STI
KNOWLEDGE

"Business Metrics"

Business Intelligence that Positively Impacts Your Business

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In today's contact center environment, leaders are always trying to determine what reports they need in order to effectively measure their business. Contact centers have matured over the last decade to where they understand the value of reporting and its importance on their business. Contact center leaders also recognize that the value in reporting lies in its ability to "tell a story" or deliver information to all arms of the organization. Basic call stats and measures are no longer the standard for reporting. Instead, Business Impact reporting, Morning Reports, Executive Summaries, and Balanced Scorecard reporting are the essential reporting tools necessary for contact center leaders to position their organization as centric to the entire enterprise.

So why do we need effective Business Metrics? Why do we need to provide data and reports to our team, and the organization in general? Below are four major reasons for providing effective business metrics:

Performance
- Team
- Individual

Benchmarking
- Industry
- Continuous Improvement

Financial
- Budgeting
- Incentive Programs

Marketing
- Within the organization
- Self promotion

Another commonly asked question is "What should I measure?" Contact Center leaders are always looking for that "silver bullet" report that provides them the information they need to manage and lead their business. "If we could find that one report that provides us all the key measurements to run our business and measure success, our lives would be great!" The reality of it is there is no single report, no compilation of data on a single sheet of paper that will provide you as a leader, the information necessary to successfully run your business. It would certainly be nice, but not realistic! So what do we do? How do we run our business effectively, without creating a multitude of reports that on their own only provide pieces of information to act on? The answer to this, as well as what the contents of your report will have, lies in the first step of any process based methodology, **Assessment**.

Assessment

Assessment is one of the most overlooked factors in reporting. Most reporting is reactionary in nature. You have a problem; you need a report to tell you how bad the problem is! You get information on a report that shows you a trend, but you need further reporting to understand the problem. You want general information in a report, and realize you actually need more information to make a decision on how to act. These scenarios are very common today because contact center leaders do not take the time to assess what they are actually looking for. Before creating any report,

ask yourself this;

- What is in the number that I will get back?
- Why am I looking for a specific number?
- What am I going to do with that number when I get it?
- Who is going to take action on the number I receive?
- How often do I need the number?
- Will that number ultimately lead to better business decisions?
- If the number is for someone else (supervisor, management), what are his or her intentions?

In order to maximize your time and energy related to your business metrics, it is important to ask these questions prior to the creation of reports. Answering these questions will allow you to build reports and compile metrics that have deep, longer lasting value to the organization.

What's in a number?

Most contact center leaders often ask, "What metrics are important?" While there is no single answer to which business metrics are the most important there are general best practice principles that can be applied to determine an effective balanced scorecard of business metrics.

1. **Do your Business Metrics help reduce costs?**
When building reports and the metrics contained within them, take the time to look at the big picture strategy of your contact center. If you have been tasked with reducing costs, short or long term, then some of your reporting should provide business metrics to achieve that goal.

2. **Do your Business Metrics provide productivity analysis?** When you are creating reports you always want to look at how to consistently improve productivity within your organization. Productivity relates not just to your contact center but rather the entire company as a whole. How impressed will your supervisor's be if you were able to provide a report that shows them an increase in organizational productivity? The business metrics associated with this measurement are in your contact center. It is a matter of assessing where they are and how to capture and report them.

3. **Are you enabling your organization to sell more?** Any executive will tell you that you add value to the organization exponentially when you enable the organization to sell more. Most contact center leaders view their role from a cost basis perspective, and subsequently provide business metrics that only focus on the cost side of the business. Those contact center leaders who can show tangible value in their ability to aid their company in selling more will position themselves as leaders within the entire enterprise.

4. **Are you improving the customer experience?** Whether you are reporting business metrics that measure internal or external customer satisfaction, you are providing details on why your customers should continue to take advantage of the products and services your company sells. Business metrics associated with this type of measurement tend to be "Customer Satisfaction Survey's." While they are good, and time proven, there are other Business Metrics that support improved, and industry leading customer experiences. One example may be

average talk time, or mean time to resolve.

5. **Do your reports market you and your team to the organization?** Critical to any long-term success in a contact center, is a contact center leader's ability to "sell" themselves and their team to the other parts of the organization. Remaining a centralized strategic partner within the organization requires outbound marketing, and providing business metrics associated with your success. These Business metrics can range from First Contact Resolution to Knowledge Management utilization.

Getting Started

Once the assessment has been completed you are ready to build your reports. Often times contact center leaders view reports as just data on a page. That approach can lead to diminished value in the product you are producing… Your report. Your report says a lot about you and your contact center. If confusing to read, or requires an understanding of your work environment to interpret, then it will likely not be utilized or valued. Spend time on the asectics of your report, work with someone in your marketing department if necessary, to ensure a good look to your report. Ultimately, the report is a representation of you and your contact center. You would want that representation to be as professional as you and your contact center team!

After the design is complete, you are ready to produce the reports. After the reports are generated validate the data. This is also an area where managers overlook easily. They are so interested in showing the data to anyone that comes along they forget that the data itself may be flawed. Always spend time after a report is created validating the data against new information, and any sub-reports that contain a subset of data. There is nothing worse than providing a business report that has flawed data. Again, reporting is a representation of you and your team. If the data is incorrect the perception is now that the work you and your team does is sloppy.

Setting the Bar

When contact center leaders create Business Metrics theyare often asked how to compare, and what to compare their metrics to. They should recognize that there are three primary areas of comparison:

Industry Comparison: Your business metrics should tell a story about your business, but it is important to be able to compare that "story" to industry standards. When creating your business metrics review what the industry measures. If possible, compare how other contact centers in your vertical are measuring their business and what world class Business Metrics have been established specifically for your industry.

World Class Comparison: When developing your business metrics take the time to review white papers, organizations such as Gartner, as well as your partners to ensure you can compare your business metrics against what is considered World Class. While you may not intend to set goals to achieve the world-class metrics, it is important to understand where your organization is compared

to such high standard metrics.

Your own Comparison: As you develop business metrics for your organization it is important that you completely understand what you are trying to achieve organizationally. While we have discussed the reasons for creating business metrics, you should compare and benchmark your metrics against what your goals and objectives are for the organization. Creating Business Metrics that don't allow comparison to what the business is trying to achieve is counterproductive.

Who is your audience for Business Metrics?

After you have spent the time and resources necessary to create the business metrics you need to enable your organization to be successful you have to market the results. So who is your audience for your business metrics? Your audience is broken up into four groups:

- Executives (CEO/CIO/CFO)
- Department Leaders
- Contact Center Team
- Users

The executives of your organization should see your business metrics on a regular basis. The business metrics that you provide them with should focus on their contribution to your success, as well as the organizations success. Providing your CEO with ACD statistics for a low call volume day probably will have little impact on their ability to understand the value you and your team provide the organization. A Business metric that shows you saved the organization hundreds of thousands of dollars by implementing a voice-automated technology though is great marketing material. This also demonstrates to the CEO your focus on costs and the company's bottom line!

Your department leaders, or in some cases your peers, need information regarding their relationship with your contact center. Invest the time to interview your department leaders to determine what business metrics they need to make them more successful. Once you have developed the reports, share them with those leaders and work to ensure that they are more successful because of the Business Metrics you deliver.

Your contact center team typically sees many reports for any given time period, but what means the most to them is success. Success in your team should be both individual and team oriented. Your business metrics should align themselves with that strategy. Creating business metrics just to determine who is not performing is a narrow approach to solving problems and becoming a leader. Creating reports that show improvement, successful deployment of technology, and team success are all methods of reporting that should be utilized.

Your users are the most important external asset to your company. Don't underestimate their need for Business Metrics. Contact center leaders can sometimes be apprehensive about providing reports and business metrics that show performance. That apprehension typically leaves your users questioning how you do business and how they are being supported. Create business metrics for your users that are relevant to them being successful, regardless of whether or not the data itself is positive or negative. Your Business Metrics tell a story that your users want to hear, good or bad. Provide them the information, and if the information is not positive, provide the leadership to improve the service you are providing.

The single most important aspect of delivering your business metrics is to know your audience. Make sure the data and reports you provide are relevant to their cause, not yours. Once you deliver your business metrics, ask how they were received and if they provided the business impact that you intended.

Benchmarking and Business Metrics

So why do we need to benchmark our business metrics? Simply put, all roadmaps have a starting point, and as a leader that starting point is the geneses for the direction and actions you will take.

Determining what to benchmark for your Service Desk is more important than the action you will take with the results. Pertinent metrics are central to increasing the value of your Service Desk and should be benchmarked. The end result of benchmarking should always be to objectively analyze your Service Desk and determine areas of improvement. Organizations sometimes make the mistake of benchmarking those functional areas where they believe they are strong. Consequently when Contact Centers benchmark "easy" functional areas within their service environment they sometimes ignore areas of weakness. Ultimately, objectivity is sacrificed for "comfort" in the numbers. End result is little or no improvement in support because of a narrowly outlined benchmarking effort.

Best Practice Reporting

Business metrics are essentially about reports and the data contained within them. Most contact center leaders are looking for starting points as it relates to reports. What data points should I collect, what

systems should I be looking for data in. Because every contact center is unique, it is virtually impossible to say that you will need these exact reports with these exact data points. As a best practice approach reports, subsequent data points and technology should be utilized to create the desired business metrics you require.

Top 10 Best Practice Reports

1. First Contact Resolution
2. First Level Resolution
3. Average Time To Resolve
4. Aged Trending Case Reports
5. Average Speed to Answer
6. Abandonment Rate
7. Contacts per Professional (Utilization Rate)
8. Average Talk Time
9. Knowledge Management Utilization
10. Customer Satisfaction

Date Points within your problem management application, with subsequent reporting:

Problem Management Application — Report

Case Categorization —   Root Cause Analysis

Case Assignment   — Total Contact Ownership

Date & Time stamp   — Aged Trending of Cases

Case Information   — Customer Satisfaction

Case Details   — Quality Assurance

Knowledge Capture — Knowledge Utilization

Case Work Effort   — Mean Time To Resolve

Customer Detail   — Root Cause Analysis

Summary

The contact center industry has evolved over the last decade and most contact centers know that they bring value to their company. Contact center leaders today need to illustrate that value to their company effectively. In order to do this they must have Business Metrics that provide positive impact to the business. Whether the positive business impact is through providing detailed analysis of the business, or simply marketing the success of a project, contact center leaders have this obligation. And when they create and utilize business metrics they should always be asking these questions:

• Are my Business metrics helping to determine the success/failure of my organization?

• Do my business metrics tell a story, or "paint a picture?"

• Are my business metrics validating a belief or assumption?

• Do my business metrics measure individual and team performance?

• Do my business metrics determine my organizational worth, and that of my team?

• Can my business metrics provide benchmarking and trend analysis?

Sample Reports

• MorningReport

• FCR Report

• Business Impact Report

• Open Ticket Report

About the Author

Tim Dewey, Vice President, Enterprise &
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As Vice President of Operations for STI's Enterprise and Government solutions and services, Tim is responsible for comprehensive account lifecycle management for all customers in these industry sectors. Tim focuses on delivering service desk and call center business processes that consistently exceed service level agreements and provide short- and long-term cost savings for STI's customers. In addition, Tim strategically identifies new solution opportunities with partners that will expand the BPO services STI is able to deliver to its customers.

Tim has been with STI Knowledge since 1999 and has managed virtually every aspect of the company's service desk solutions. He has implemented customer quality of service programs, deployed state-of-the-art VOIP technology for multi-customer centers, and successfully utilized STI's Knowledge Center Best Practices to set industry standards for service levels. Prior to joining STI, Tim was Operations Manager at CHS, Inc. in Georgia, and was Operations Director for Connecticut-based Central Communications where he was responsible for day-to-day operations of the company's call center.

About STI Knowledge

STI Knowledge provides BPO and Enterprise Support solutions and services for the healthcare, insurance, government, and commercial enterprises industries. STI helps its customers reduce costs, increase productivity, and improve service quality through business process re-engineering, technology enabled automation, and global delivery centers.

STI was founded in 1995 and is headquartered in Atlanta, Georgia and employs approximately 350 professionals throughout the United States.

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Morning Report ™

Overview

Customer Name

Calls Received and Incidents Created For 3/1/2004 through 3/31/2004

Calls For 3/1/2004 through 3/31/2004

SLA Answer/Abandon Rate

Total Calls Received		**1,729**
Metric	**Total**	**%**
Answered	1,660	96
SLA Abandoned	25	1
Non-SLA Abandoned	38	2
Voicemail	6	0
Average Talk Time	5:40	mm:ss

SLA Answer Time

Total Calls Answered		**1,660**
Metric	**Total**	**%**
Avg Speed to Answer	0:22	mm:ss
In 30 Seconds or Less	1,497	90
31 to 45 Seconds	41	2
46 to 60 Seconds	24	1
Total Talk Time	9,401	Minutes

SLA Abandon Time

| Total Calls Abandoned		**63**
Metric	**Total**	**%**
Average Abandon	1:10	mm:ss
15 Seconds or Less	34	54
16 to 30 Seconds	4	6
31 to 60 Seconds	7	11
61 Seconds or More	18	29

SLA Abandon = Abandon after 30.00 secs

Incidents For 3/1/2004 through 3/31/2004

SLA Call Logging Ratio

Total Calls Answered		**1,660**
Metric	**Total**	**%**
Total Cases Created	**1,990**	**120**
ACKNOWLEDGED	65	3
CLOSED	1,896	95
OPEN	6	0
TRANSFERRED	23	1
Closed Same Day	**1,108**	**80**
First Contact Resolution	**1,097**	**76**

Incident Status as of 4/7/2004 only.
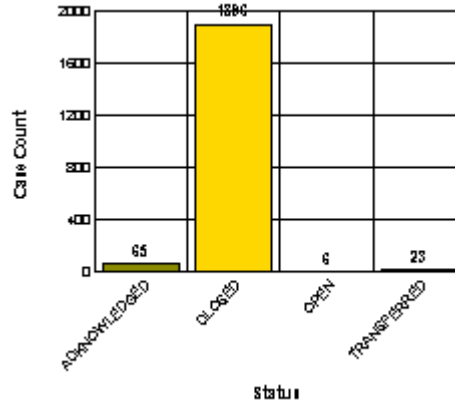
Incident Origination & SLA Compliance

Total Incidents Created		**1,990**
Metric	**Total**	**%**
Incoming Email	**128**	**6**
0 to 15 minutes	42	33
16 to 30 mintues	17	13
31 to 60 minutes	15	12
61+ minutes	54	42
Average	499.29	Minutes
Incoming Vmail	**3**	**0**
0 to 15 minutes	2	67
31 to 60 minutes	1	33
Average	16.98	Minutes
Web Initiated	**304**	**15**
Incoming Call	**1,555**	**78**

Snapshots

Incident Aging

Total Open Status Incidents		**185**
Metric	**Total**	**%**
< 24 Hours	37	20
24 - < 72 Hours	20	11
72 Hours - < 1 Week	57	31
> 1 Week	71	38

All Cases as of 4/7/2004 only.

Cases Created 1990

Metric	**Total**	**%**
Transfer to Technician		53.32
Average Transfer Time*	1:46:13	hh:mm:ss

* Average Time between incident creation and transfer.

First Contact Resolution - Classification Summary

Overview

Customer Name

All Incidents from 4/1/2004 to 4/5/2004

SCIM TOTAL = 309

Incident Classification	Count	FCR Count	FCR%
System: CONCERT	306	165	53.9
Component: HANG UP	5	5	100.0
Item: HANG UP	5	5	100.0
Module:	5	5	100.0
Component: HARDWARE	21	4	19.0
Item: DESKTOP HW	4	0	0.0
Module:	3	0	0.0
Module: MODEM	1	0	0.0
Item: LAPTOP HW	13	2	15.4
Module:	9	1	11.1
Module: HARD DRIVE	1	1	100.0
Module: LCD SCREEN	1	0	0.0
Module: OTHER	2	0	0.0
Item: NT SERVER HW	1	1	100.0
Module:	1	1	100.0
Item: PRINTER HW	3	1	33.3
Module: CONNECTIVITY	3	1	33.3
Component: IMAC	10	1	10.0
Item: ADD	1	0	0.0
Module:	1	0	0.0
Item: CHANGE	2	1	50.0
Module:	2	1	50.0
Item: INSTALL	7	0	0.0
Module: Desktop	1	0	0.0
Module: Laptop	3	0	0.0
Module: Other Equipment	3	0	0.0
Component: NETWORK RELATED	154	99	64.3
Item: INTERNET	2	0	0.0
Module:	1	0	0.0
Module: INTERNET EXPLOR	1	0	0.0
Item: INTRANET	10	9	90.0
Module:	10	9	90.0
Item: LAN/WAN	80	46	57.5

Business Impact Report

Overview

Customer Name

Current week consists of dates 3/28/2004 through 4/3/2004

Previous week consists of dates 3/21/2004 through 3/27/2004.

SLA Answer/Abandon Rat	Current	Previous	% Change
Total Calls Received	399	306	30.39
Total Calls Answered	387	294	31.63
% Calls Answered	97	96	0.95
Non-SLA Abandoned	6	8	-25.00
% Non-SLA Abandoned	2	3	-42.48
SLA Abandoned	6	4	50.00
% SLA Abandoned	2	1	15.04

SLA Answer Time			
In 30 Seconds or Less	351	273	28.57
% In 30 Seconds or Less	91	93	-2.33
31 to 45 Seconds	8	3	166.67
% 31 to 45 Seconds	2	1	102.58
46 to 60 Seconds	4	4	N/A
% 46 to 60 Seconds	1	1	-24.03
Avg Speed to Answer	0:18	0:17	4.99
Voicemail	0	0	N/A
Average Talk Time	5:44	5:46	-0.79
Total Talk Time	2,216	1,697	30.59

SLA Abandon Time			
Total Calls Abandoned	12	12	N/A
Average Abandon	1:25	0:49	74.40
15 Seconds or Less	5	8	-37.50
% 15 Seconds or Less	42	67	-37.50
16 to 30 Seconds	1	0	N/A
% 16 to 30 Seconds	8	0	-100.00
31 to 60 Seconds	0	1	-100.00
% 31 to 60 Seconds	0	8	-100.00
61 Seconds or More	6	3	100.00
% 61 Seconds or More	50	25	100.00

Current week top classification

CONCERT, NETWORK RELATED, LAN/WAN	126
CONCERT, NETWORK RELATED, SECURITY & PWS	74
CONCERT, SOFTWARE, MS OUTLOOK	50
CONCERT, WRONG NUMBER, WRONG NUMBER	31
CONCERT, REMOTE ACCESS, SECURE ID	31

Previous week top classification

CONCERT, NETWORK RELATED, SECURITY & PWS	82
CONCERT, NETWORK RELATED, LAN/WAN	75
CONCERT, SOFTWARE, MS OUTLOOK	36
CONCERT, HARDWARE, LAPTOP HW	26
CONCERT, WRONG NUMBER, WRONG NUMBER	25

Open Incident Report

Overview

Customer Name

All Open Incidents for CHDP bsmeade

Technician/CHDP ID: bsmeade

Ticket:	STI-00892707	**Description:**	
Status:	TRANSFERRED		
CHDP:	bsmeade		
Severity:	3		

Description:

> User is calling in to report that his BTRA dialer is not working. It keeps giving him a port is in use when he tries to dial outside of his docking station. When his laptop is docked it works fine. He has uninstalled and reinstalled the BTRA dialer outside of the docking station to see if it would fix the problem. It still isn't working. He would like for someone to come up and see if they can get it to work outside of the docking station. He is sitting in cube14A47.

Contact Name:	Mary Smith
Phone:	(770) 123-2345
Department:	ATL
Opened:	4/7/2004 7:59:28AM

Result:

> Desktop Technician has reported the users problem has been corrected. He had modified the dialer settings to allow access. Contacted the user to confirm problem has been resolved and that he is actively working.
>
> Desktop will forward documentation to add to the Knowledge Base related to dialer settings.

bsmeade	1
Grand Total:	1