Effective Reporting

White Paper

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The Nuts and Bolts of "Best Practice" Reporting for the Contact Center

What Is Effective Reporting?

What is your definition of effective reporting? Effective reporting is only defined by the results obtained by reviewing the report data and making changes to improve performance of the team or individual. Producing contact center "Best Practice" reports is only accomplishing 50% of the battle. Understanding and interpreting the data provided in the reports accounts for an additional 25%. Taking appropriate action to improve performance or change staff behavior accounts for the remaining 25%. Too often contact center managers feel they have won the battle by developing and producing "Best Practice" reports on a regular basis. Some managers understand and interpret the data, but only a few actually are able to use the data to improve performance and deliver a higher quality of service.

Effective reporting is defined by the results obtained by reviewing the report data and making changes to improve performance.

There is an old adage that says, "For the highest level of success, you must consistently inspect what you expect." The contact center that is well monitored and measured understands the value of meeting and exceeding service level expectations. A consistent measurement and reporting methodology creates an environment of achievement and success that benefits the entire organization.

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Top Six Standard Reporting Rules

1. Develop reports for which accurate and complete data can be collected.

2. Develop reports that measure the right thing and that drive you and your team to perform at the appropriate, advertised levels.

3. Develop only enough reports necessary to adequately track success and gauge performance. Too many reports can create unnecessary expenses and paperwork.

4. Develop reports that are simple and easy to explain. If a report cannot be explained in less than ten or fifteen words it may be too complex or irrelevant.

5. Reports should always pass the SMART test. This means that the metrics will be Specific, Measurable, Actionable, Relevant, and Timely.

6. Reports should be generated daily, weekly, and monthly based upon operational and business needs.

Let's start with documenting the "Best Practice" contact center reports so we have a common ground of understanding. Contact center reporting can be broken down into three major categories, Operational, Management and Individual/Team Performance.

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Not meeting established service levels one week of the month typically takes two weeks of above average performance to correct and overcome the deficit.

Operational Reports

Operational reports provide a graphical view of the level of service provided by the contact center that are typically produced on a daily, weekly, monthly, quarterly or annual basis. The purpose of Operational Reports is to measure the success of the contact center as compared to established service levels. Operational reports measure the health of the contact center and when viewed on a regular basis, show performance trends in the service levels.

It is important to understand that not meeting established service levels one week of the month typically takes two weeks of above average performance to correct and overcome the deficit. Effective reporting requires service levels to be reviewed on a daily basis to identify trends and ensure adequate time to correct. Failure to meet established service levels can be a result of poor performance of an agent(s), a new application or service, scheduled training, absenteeism, failure to follow documented processes or application and system outages. Investigate to determine the known reason or reasons for not meeting the stated service levels each day, looking for trends. Look at the top 10 problems over the last couple of days to understand the types of problems that were reported. Compare this list of top 10 problems to a top 10 report from the last couple of weeks. Look at the staffing levels and ACD reports to see if the contact center was fully staffed.

Effective Operational Reporting is using the data provided to analyze the performance of the team and make the required improvements. Look at the data and continue to search until the reason for missing

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the service level is known. Take corrective action if possible and communicate to the staff and key management personnel. The key is to know why the service level was missed and correct or prevent the situation from reoccurring, if possible. Taking these actions defines your level of effective reporting.

A Morning Report is generated by merging the data from the case management system and the ACD system.

MorningReport™

A MorningReport can be used to supply daily statistics to all members of the contact center. It combines the ACD statistics with case management system statistics to give management the ability to understand how the call volume fluctuates from day-to-day, how the contact center agents are performing and how the customers are being serviced. This is normally one report that is generated by merging the data from the case management system and the ACD system. If an ACD data collection software package has not been purchased and integrated with the ACD, two separate reports will suffice. A typical MorningReport provides the following statistics:

- Answer/Abandon Rate
- Answer Time
- Abandon Time
- Call Logging Ratio
- Calls by Status
- Escalation Ratio
- First Contact Resolution

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The MorningReport could also provide statistics on service escalation, email responses, and voice mail/fax response from the previous day, which may be included in the stated service levels.

A high quality MorningReport provides the contact center with a snapshot of the previous day's activities. When reviewed over time, the MorningReport provides insights into trends, when business units make changes, or when there are unexpected infrastructure problems.

Manager's Daily Status Log

The Manager's Daily Status Log provides a dashboard of graphs displaying key service level statistics and trends.

The Manager's Daily Status Log provides a dashboard of graphs displaying key service level statistics and trends. It tracks average speed of answer, abandon rate, and call volume on a daily basis, plots each against the corresponding SLA metric and also plots 30 day trend lines to provide a performance forecast. Using the log, the manager sees daily performance, is able to spot unhealthy trends before they become apparent to the customers, and can take corrective action to preserve service level performance.

Management Reports

Management reports are used to drive business decisions and show the value the contact center is delivering to the bottom line of the business. Management reports include overall service level performance, customer satisfaction, ACD statistics, top 10 problems, cost reports and ROI for technology or process changes. Trend reports

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should be created each month to highlight unusual events or identify recurring issues.

Management reports are viewed on a monthly basis to gain insight into the overall performance of the contact center. Contact center management is responsible for reviewing the SLA report to track the service level delivered to the customers and track trends. The monthly management reports provide management with a monthly synopsis of the performance of the contact center. The data from these different reports can validate to management the value add service provided by the contact center or point out their deficiencies.

If call volume rises by over 10% then focus on the top 10 problem report to understand what is causing the increase in calls.

Management reports should be used to ensure "truth and balance" within the contact center. For instance, the SLA report shows all measurements that are being met on a monthly basis. The customer satisfaction survey scores should also indicate the customers are receiving the stated level of service. If the customer satisfaction survey scores start to drop and the SLA measurements remain consistent then you may have a agent in the contact center that is directly affecting customer satisfaction.

If call volume rises by over 10% then focus on the top 10 problem report to understand what is causing the increase in calls. In most cases it is the implementation of a new software package or new service. Cost reports can help identify the impact of technical training, utilization of new tools or staffing changes. Implementing technical

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training or new tools should have a positive impact on the cost of providing support. Scheduling technical training or implementing new tools such as remote control or a password reset tool should increase First Contact Resolution, reduce Average Talk Time and eliminate After Call Work.

SLA / Customer Reports

The contact center should establish service levels with its customers that are monitored and reported each month as identified in the Service Level Agreement. Possible service levels that could be established within the SLA are: Abandonment Rate, Average Speed of Answer, First Contact Resolution, Email Responses, and Voice Mail/Fax Responses. The contact center and its extended resources must be measured and managed to consistently achieve these defined service levels. The SLA/Customer reports are monthly reports. Listed below are the possible service levels that could be included in a Service Level Agreement:

Best practice for Abandonment Rate is to not exceed 3%.

Abandonment Rate

The contact center's abandonment rate service level is the number of calls abandoned after being presented to one of the contact center queues and remaining in the queue for a minimum of 10 seconds after passing through the ACD and VRU, divided by the total number of calls offered to all queues. Best practice is to not exceed 3%.

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Best practice for First Contact Resolution is 85% of all contacts logged.

Average Speed of Answer (ASA)

The contact center's ASA service level is the total number of calls answered in less than 30 seconds divided by the total number of calls answered. Best practice ASA is 90% of all calls answered in less than 30 seconds.

First Contact Resolution

The contact center's First Contact Resolution service level is the total number of contacts logged in the case management system that are successfully resolved with the customer on the first contact (i.e. phone, email, chat, etc…) divided by the total number of contacts logged. Best practice First Contact Resolution is 85% of all contacts logged.

Email Response

The contact center's Email Response service level is the average response time of all emails presented to the contact center. Best practice Email Response is all emails responded to in less than two business hours on average.

Voice Mail/Fax Response

The contact center's Voice Mail/Fax Response service level is the average response time of all voice mails and faxes presented to the contact ce

. Best practice Voice Mail/Fax Response is all voice

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mails and faxes responded to in less than two business hours on average.

Average Talk Time is a measure of each agent's efficiency.

Additional Management Reports

There are many additional key measurements that must be managed and reported on each month to ensure the overall success of the contact center. The measurements listed below should be used to gauge progress and performance. These measurements are primarily targeted at inbound telephone calls, but as email and eventually web submitted contacts steadily increase, they must also be measured. For example, as email becomes a more important contact method, measurements of performance will be needed such as email volume, length of time in queue, amount of time composing a response and quality/accuracy of responses. Incorporation of eSupport methods into the contact center will require measurement methods to ensure its use, accuracy and benefit.

Average Talk Time

Average Talk Time is an internal measure of the contact center's efficiency in servicing its customers within the least amount of time without compromising quality and customer satisfaction. More importantly, Average Talk Time is a measure of each agent's efficiency. This measurement should be one of the measures used to assess an agent's performance. New hire agents should be given an objective higher than those of seasoned veterans. The contact center manager should discuss Average Talk Time during each

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Email Response

The contact center's Email Response service level is the average response time of all emails presented to the contact center. Best practice Email Response is all emails responded to in less than two business hours on average.

Voice Mail/Fax Response

The contact center's Voice Mail/Fax Response service level is the average response time of all voice mails and faxes presented to the contact center. Best practice Voice Mail/Fax Response is all voice

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ratio changes sharply or indicates a trend, this is an indication that something either external to or within the contact center has changed. The contact center manager should be able to explain any changes; however, some may require more research than others. Once root cause is determined, an appropriate action can be taken to counteract or compensate for the change.

Total Number of Customers

Number of customers must be tracked in order to measure contact center workload. It can be used to forecast trends and determine staffing requirements. As new customers come on board, the contact center needs to be aware of this change. Management uses this information to forecast staffing levels on the contact center.

Contacts/Customer/Month

Contacts per Customer per Month can be used to forecast trends and determine staffing requirements.

Contacts/Customer/Month must be tracked in order to measure variances in customer usage. It can be used to forecast trends and determine staffing requirements. Contacts/Customer/Month is an important internal measure because it normalizes the variable in the call volume and number of customers. Many factors cause this measure to increase or decrease. The contact center manager will measure this monthly and look for changes. Significant changes indicate a need for root cause analysis to determine the factors causing the change and the need, if any, for counteractive or corrective action.

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The recommended Customer Satisfaction Survey uses a four-point scale corresponding to the four possible choices for each question.

Cost per Contact

Cost per Contact must be tracked to ensure that the contact center is returning optimum value to the company. However, that does not mean driving down to the lowest cost possible. Industry statistics indicate that well run contact center that are delivering consistent performance against aggressive SLAs with optimum return to their customers cost between $13.00 and $22.00 per contact. Of course, many variables and many different environments have been incorporated into this overall range. It will be necessary for the contact center to analyze its particular situation to determine its optimal Cost per Contact.

Customer Satisfaction

Customer Satisfaction is a key measurement that must be taken consistently and frequently. Consistency is a key factor in determining long term improvements. Frequency is key to gaining familiarity by both the customers as well as the agents. And, frequency shows the customers that the contact center really cares about their feedback. Good customer satisfaction is an excellent marketing tool when reported to the customers and management. It also creates pride and commitment among the agents. The recommended Customer Satisfaction Survey uses a four-point scale corresponding to the four possible choices for each question. Choices are converted to numbers by assigning a score of 1 to the lowest satisfaction choice, 2 to the next choice, 3 to the next, and 4 to the highest choice.

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Performance reports should be produced each month to show the individual statistics of each agent, and within the report, the overall team statistics.

Individual/Team Performance Reports

A critical component of the contact center is managing and reporting on the individual performance of each agent and the overall performance of the team. Operational excellence of the contact center has to be achieved from the inside out. Establishing individual and team performance goals help improve the overall performance of the contact center. Ultimately this will lead to a higher customer satisfaction rating and improve the performance of each agent. In turn this will help improve the return on investment for the contact center.

Reviewing individual and team performance reports on a monthly basis provides contact center management with a precise picture of the individual performance of each contact center agent. Each agent can be compared to the overall team performance to identify training, mentoring or coaching opportunities. Reports should be produced each month to show the individual statistics of each agent, and within the report, the overall team statistics should be shown. Each agent can compare their statistics to the overall team statistics and use this as motivation to improve their own performance.

Quality monitoring of calls and contact management data is critical to the success of the contact center. Reviewing the quality of calls and data quality ensures a consistent level of service is provided each customer. If discrepancies are identified during call or quality monitoring the agent can be coached immediately

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and be provided with timely feedback to correct the inconsistency. Occupancy rate is a key performance indicator that is one of the least used individual performance measurements. Determining the occupancy rate of each agent determines the amount of time they are actually engaged in supporting customers. Occupancy rate is a key measurement for justifying staffing level increases or identifying a agent who is not utilizing their time effectively while logged in the ACD. An increased Average Handling Time usually indicates an individual is struggling with their problem isolation skills or is having trouble capturing all the necessary data in the call. Listed below are the typical individual/team performance measurements.

When Call Monitoring, three to five calls per month should be selected randomly and reviewed.

Call Monitoring

Call Monitoring is used to measure the quality of a live conversation, to ensure compliance with call scripts and to ensure the required level of customer service is delivered for each telephone interaction. Three to five calls per month should be selected randomly and reviewed based on completing all parts of the interaction according to contact center best practice and policy. Create a Call Monitoring Form that list the components of a quality call and provide a rating scale to evaluate each component. Areas of accomplishment as well as areas for improvement are discussed with the agent. Call monitoring results should also be a component of the agent's annual performance review.

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Establishing an objective of high contact quality will improve resolution rates and overall customer satisfaction.

Quality Monitoring

Three to five calls or contacts logged each month by the contact center agent should be selected randomly and audited for quality assurance. This audit process verifies the quality of work of each agent in the calls or contacts he/she logs. Establishing an objective of high contact quality will improve resolution rates and overall customer satisfaction. Whether perception or reality, the lack of a quality monitoring process prevents the contact center from assuring that agents are handling and processing calls according to contact center standards. Lack of quality monitoring creates several performance issues, both inside and outside the contact center. Primarily, low-quality contacts slow the resolution process and caus managers or escaltion team members to duplicated the contact with the customer, which leads to lower customer satisfaction and other departments within the enterprise to develop a lack of faith in the quality of work of the contact center.

Create a Quality Monitoring Form to rate the randomly selected calls/ contacts to determine the agent's audit score. Areas of accomplishment as well as areas for improvement are discussed with the agent. Quality monitoring results should also be a component of the agent's annual performance review.

Occupancy Rate

Occupancy rate determines the amount of time the agent is helping customers. To determine the overall Occupancy Rate of

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After Call Work (ACW) becomes an accurate measure of the agent's use of screen/human harmony.

the contact center, the following calculation will need to be performed at the end of each month. The Occupancy Rate is determined by taking the total time agents were providing service for the customers (Talk Time plus After Call Work (ACW) time plus Available Time) divided by Login to Logout (Staffed) time. The "Best Practice" Occupancy Rate is 85%. Occupancy Rate should be a component of the agent's annual performance review.

Expressed as a formula, Occupancy Rate is calculated as follows:

$$\text{Occupancy Rate \%} = \frac{\text{Total Talk Time} + \text{Total ACW time} + \text{Available Time}}{\text{Login to Logout Time}}$$

Establishing an Occupancy Rate requires training each agent on the purpose of ACW and the proper use of ACW versus Not Available. The primary use of ACW is to allow agents to hang up from the current customer call without allowing the ACD to route another call immediately to his/her phone. Requiring the agent to use ACW if they require additional time to complete the contact will distinguish this amount of actual work time from Not Available which can be used for breaks or any other activities not associated with helping the customers. ACW becomes an accurate measure of the agent's use of screen/human harmony.

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The exercise of creating new reports or modifying existing reports can be a valuable initiative with many payoffs.

Average Handling Time (AHT)

Average Handling Time is similar to Average Talk Time but also includes After Call Work (ACW). Average Handling Time is a measure of each agent's efficiency in completing all the work associated with handling each call (the call itself and completing the ACW). New hire agents should be given an objective higher than those of seasoned veterans. This measurement should be one of the measures used to assess a agent's performance.

Conclusion

Reports exist in every IT organization. The challenge most contact centers face is being able to use the data provided in the reports to justify making changes in the performance of the contact center. Review the reports currently being produced by the ACD and case management system. Compare to the reports or measurements listed in this article and determine if changes or additional reports need to be developed. The exercise of creating new reports or modifying existing reports can be a valuable initiative with many payoffs. The peace of mind of knowing you are capturing all the key measurements within the contact center is worth the investment!

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About Zavata, Inc.

Zavata, formerly STI Knowledge, provides BPO and IT Enterprise Support solutions and services for the healthcare, insurance, government, and commercial enterprises industries. Zavata helps its customers reduce costs, increase productivity, and improve service quality through business process re-engineering, technology enabled automation, and global delivery centers. Zavata was founded in 1995, is headquartered Atlanta, Georgia and employs approximately 350 agents throughout the United States.

About the Author

As a senior consultant for Zavata, Kelly strategically develops IT and BPO solutions for Fortune 1000 companies and government agencies based on Industry best practices. Kelly has been with Zavata since 2000 as a Senior Consultant. Prior to joining Zavata, Kelly worked for Duke Energy in Charlotte, NC for 28 years in Operations and Customer Support. Kelly is ITIL certified and a certified Help Desk Director.