ICMI®

# A WOW CUSTOMER JOURNEY!
## Actionable Data in Today's Multichannel Contact Center

*Research Report and Best Practices Guide*

Sponsored by:

white pages™ PRO

**2013 REPORT**

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# A WOW CUSTOMER JOURNEY!

Actionable Data in Today's Multichannel Contact Center Research Report and Best Practices Guide

## TABLE OF CONTENTS

To return to this page click the Table of Contents button at the top of the page.

Click on links in the table of contents to jump to a section

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# EXECUTIVE SUMMARY & KEY FINDINGS

The contact center is arguably the greatest source of metrics and data in the entire organization. As we continue to increase channels, add technology, and cater to a more connected customer base, the data generated by the contact center becomes more important than ever.

With today's always-connected customer, a WOW experience may no longer mean going 'above and beyond'. It oftentimes means simply providing a fast, anytime, and anyplace interaction. Customers want relevant and personal conversations in real-time and through their channel of choice. They also want the company and the contact center agent to be able to anticipate their needs and act proactively where possible. More and more experts are saying that the only way to truly provide WOW in the multichannel contact center is through data and analytics. It's the data that powers the best customer experience.

That experience ultimately requires the organization to understand what, where and when the customer needs assistance – it's the 360-degree view – the customer journey map.

"If you want to provide great customer service, you can't just focus on one data point in the contact center. You need to look at all the customer journeys across all their interactions. This is the power of analytics," says Yochai Rozenblat, President, Enterprise Group at NICE Systems.

> "Big data; the data is not the point, the insight you generate from it is."
>
> Yochai Rozenblat,
> President, Enterprise Group at NICE Systems

As we know, data hits the contact center from all sides. We're inundated with structured metrics and reports, as well as unstructured contacts, (emails, calls, chats, tweets), that if used correctly can bring the contact center closer to the customer, identify areas that require improvement, and help improve overall efficiencies.

But all this data comes with real challenges. Not every contact center is equipped with the right tools, processes and technology to harness all the information it receives. One must also have the knowledge of what data is really necessary and what is no longer applicable in today's multichannel contact center. And at the crux of it all, "How can a contact center turn all the big data into ACTIONABLE data?"

In order to best answer these questions, the International Customer Management Institute (ICMI) and Whitepages PRO launched the "Actionable Results: Using Big Data in the Contact Center" survey in the third quarter of 2013. "Contact centers often fail to realize how simple and impactful data can empower them to help their customers, agents, and ultimately, the businesses' bottom line," said Craig Paris, Chief Revenue Officer at WhitePages.

As Rozenblat from NICE put it, "Big data; the data is not the point, the insight you generate from it is."

This new research, along with other current ICMI data, will provide contact center professionals the materials they need to properly map their customer journey and plan their multichannel data enhancements for in 2014. To be competitive, organizations must better use customer and agent analytics and be able to react to them quickly and efficiently.

The ICMI Expert Spotlight accompaniments provide advice on two key aspects of actionable data – *Fine Tuning Your Contact Center through the Innovative Use of Metrics* and *Reporting Contact Center Activity*.

By using contact center data as a solution, rather than an output, an organization is equipped to truly make improvements across all facets of the customer journey.

## KEY FINDINGS:

- Contact centers use data to manage overall agent performance (67%) and for identifying CSAT improvement (48%)
- Over 60% of contact centers cannot provide customer information proactively to an agent
- 41% of customer contact information is still manually inputted by an agent
- Almost half (48%) of contact centers consistently collect and report on metrics they don't use
- 92% of contact centers with CTI report substantial gains in agent productivity and efficiency

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
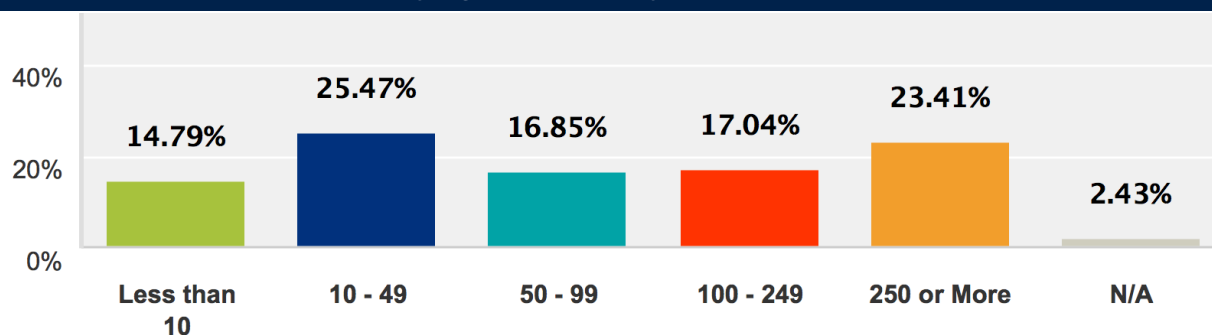*Research Report and Best Practices Guide*

# STUDY DEMOGRAPHICS

Our community consists of nearly every role and level of customer service which provides an accurate representation of the sentiments and tactics currently being demonstrated in today's contact center. The 542 respondents to this survey were primarily executives (13.1%), directors (16.1%) and managers (37.1%). Also participating were operational managers and analysts from training, product, human resources, workforce management, and QA (12.1%), contact center supervisors (5.9%), and information technology (6.3%). A few agents and consultants rounded out the respondent mix.

Participation spanned across all industries with financial services (banking, insurance and securities), healthcare, technology (hardware and software), and telecom accounting for the top verticals at 16.9%, 9.4%, 8.7% and 7.8% respectively. Both education and manufacturing represented 3.9% of the respondents. An additional 5.4% are outsourced service providers.

Although North America and the United States specifically was the most represented region, participation in the study came from all over the world.

Contact centers of every size responded for an objective sample size, with those having 10-49 agents (25.4%), and 250 or more (23.4%), representing the majority.

## How many agents work in your contact center(s)?

| | | | | | |
|---|---|---|---|---|---|
| 14.79% | 25.47% | 16.85% | 17.04% | 23.41% | 2.43% |
| Less than 10 | 10 - 49 | 50 - 99 | 100 - 249 | 250 or More | N/A |

As is typical, over half (55.4%) report customer service as their primary function, with another 24.6% offering a blend of service and sales. 12.6% are helpdesk, while 3.9% are telesales centers.

## What is your contact center's primary function?

| | |
|---|---|
| Customer Service | 55.35% |
| Help Desk | 12.57% |
| Telesales | 3.94% |
| Blended Service and Sales | 24.58% |
| N/A | 3.56% |
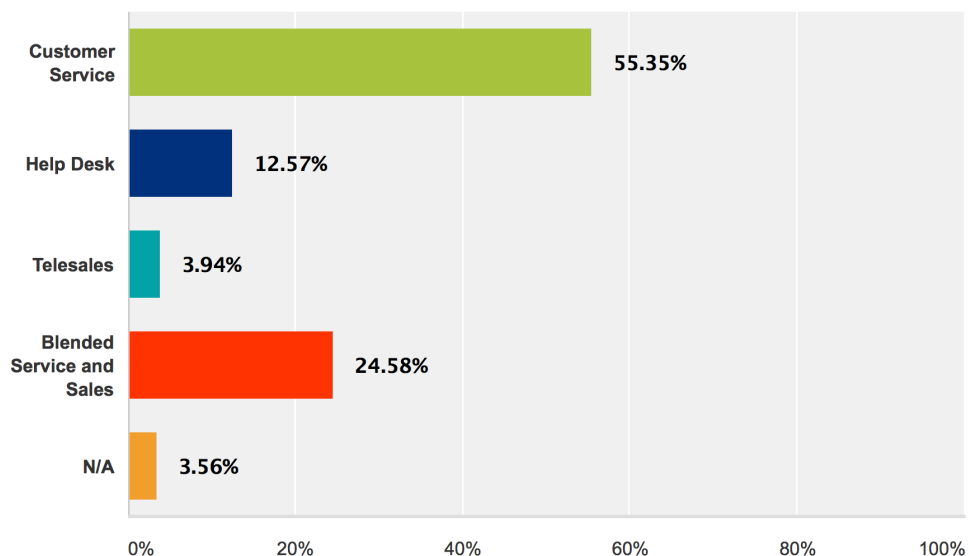
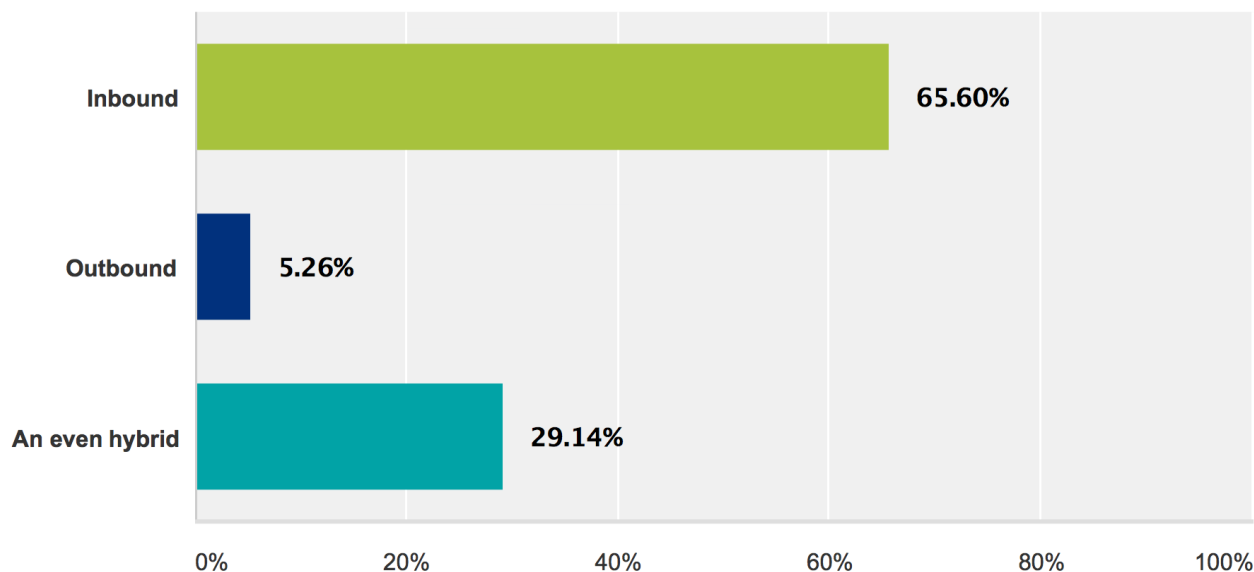The majority (65.6%) are predominantly inbound, although 29.1% report being an even hybrid of both inbound and outbound volume. Only 5.3% are pure outbound contact centers.

## Is your contact center primarily inbound or outbound?

| | |
|---|---|
| Inbound | 65.60% |
| Outbound | 5.26% |
| An even hybrid | 29.14% |

*(Horizontal bar chart: axis from 0% to 100%)*

Of the survey respondents, 49.6% are operating with a premise-based infrastructure, while only 9.8% are pure cloud. 31.6% have a blended mix of both and another 9.0% are uncertain.

## What infrastructure is your contact center built upon?

*(Donut chart)*

- Don't Know 9.02%
- A blend of both 31.58%
- Cloud 9.77%
- On-premise 49.62%

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

2013 REPORT
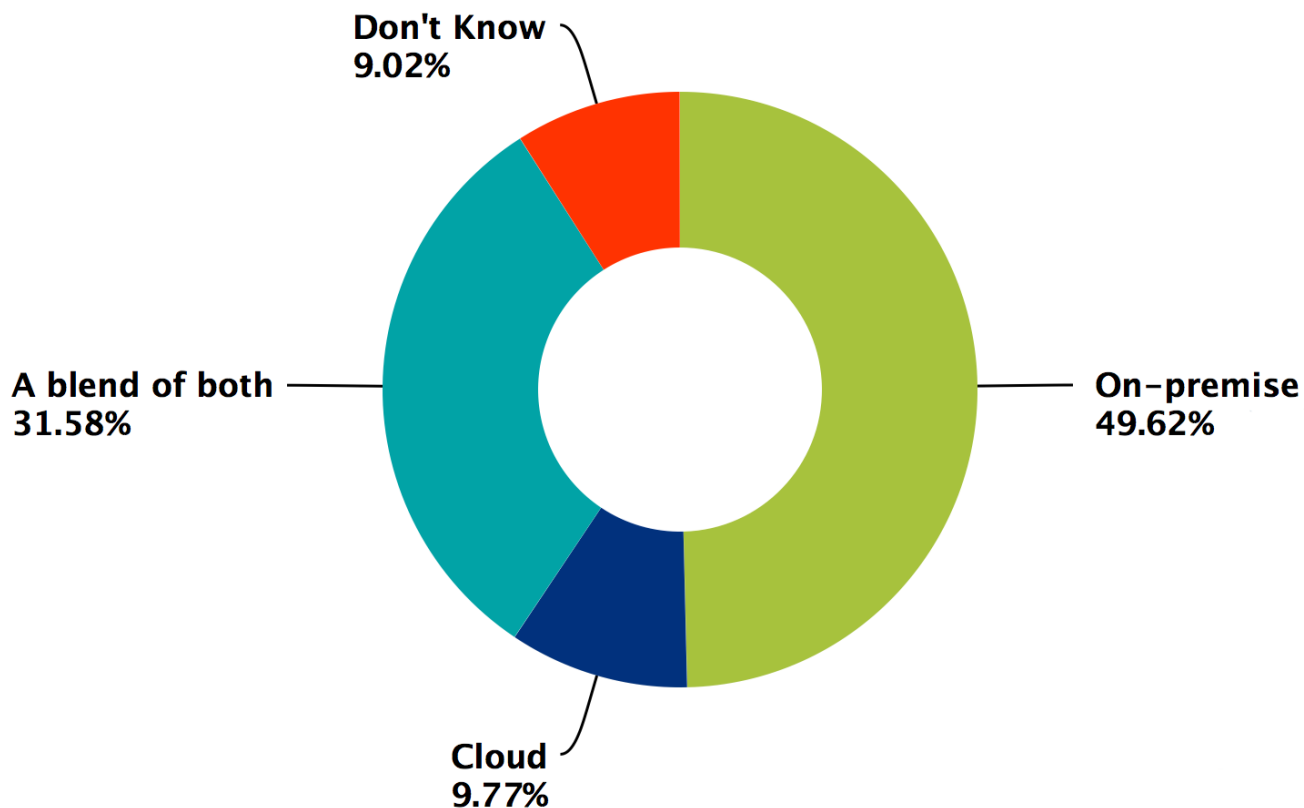
# UNDERSTANDING DATA

## Defining Unstructured Versus Structured

Contact centers collect, track and analyze customer-related data from more sources than ever before. While structured data remains the most common from a reporting standpoint, semi-structured and unstructured data is arguably more prevalent and important to the overall organization.

Structured data includes call records from the telephony switch, quality assurance scores, workforce management statistics, and reports generated from HR, CRM and ERP systems. Essentially it is any data that can fit into an excel document field.

Wikipedia defines unstructured data as, 'information that is not organized in a pre-defined manner." Its irregularities and ambiguities make it sometimes difficult to collect, understand, and score as it is not traditional data that comprises fielded forms in databases.

Unstructured sources of data include calls, pictures, emails, chats, video, completed surveys, call recordings, text-based interactions, social responses, and desktop usage.

The intention is to operationalize unstructured data which then allows contact centers to understand people - intent, sentiment and emotion, behavior and their entire journey.

"Companies are applying text and sentiment analysis to this unstructured data, and looking for patterns and trends," says Deepek Advani, Vice President of Predictive Analytics for IBM. "It allows contact centers to analyze call center agent records, identify customer concerns, highlight trends and patterns, and provide early warning capabilities."
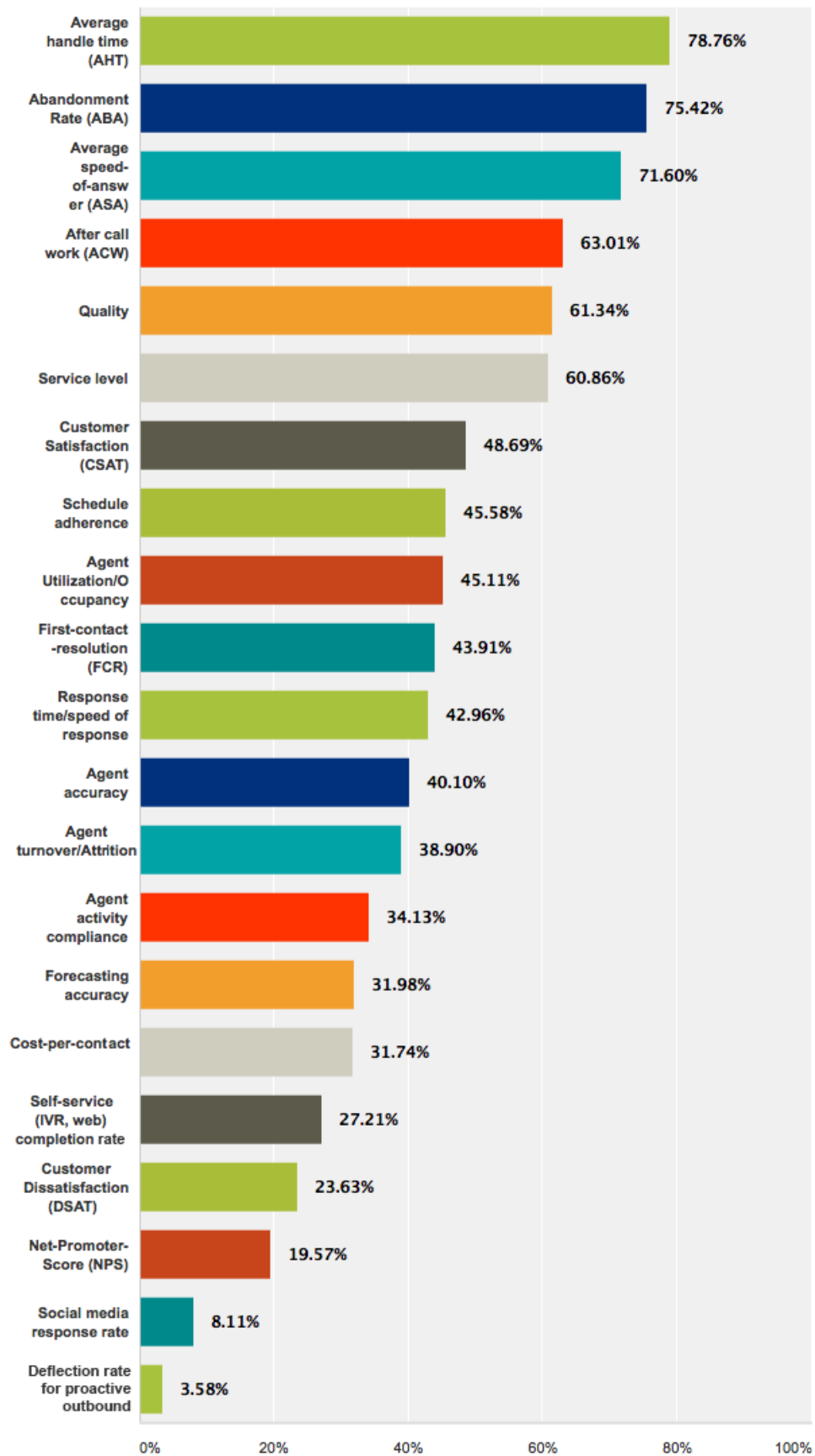
## The Right Data

If you work in the contact center, you are aware of this fact: metrics are everywhere. If it moves; it is measured. We've established systems and processes for tracking every type of contact volume, agent activity, and customer movement. Dashboards, scorecards, rankings, and analytics are generated constantly, and statistics seem to change with every interaction. What do we accomplish with this approach? More "data" than we know what to do with and the mounting desire to claim defeat.

Instead, let's step back and start with the data itself. Are you collecting and offering up the right data that enables agents to help the customer on the other end of the chat, email, phone, or tweet to the best of their advantage?

And once that customer interaction is over, are you then managing to the data and using it to make enhancements at both the agent and the customer level? Finally, is the data shared appropriately across the organization to map out the customer journey and improve the overall experience?

ICMI asked contact center leaders in this latest survey, "Which metrics are you currently collecting data for?" As expected, the list was vast. The five most collected metrics are average handle time (AHT) – 78.8%, abandonment rate (ABA) – 75.4%, average speed of answer (ASA) – 71.6%, after call work (ACW) – 63.0% and quality – 61.3%. Surprisingly, customer satisfaction (CSAT) is collected by less than half of respondents.

**2013 REPORT**

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Which metrics are you currently collecting data for?

| Metric | Percentage |
|---|---|
| Average handle time (AHT) | 78.76% |
| Abandonment Rate (ABA) | 75.42% |
| Average speed-of-answer (ASA) | 71.60% |
| After call work (ACW) | 63.01% |
| Quality | 61.34% |
| Service level | 60.86% |
| Customer Satisfaction (CSAT) | 48.69% |
| Schedule adherence | 45.58% |
| Agent Utilization/Occupancy | 45.11% |
| First-contact-resolution (FCR) | 43.91% |
| Response time/speed of response | 42.96% |
| Agent accuracy | 40.10% |
| Agent turnover/Attrition | 38.90% |
| Agent activity compliance | 34.13% |
| Forecasting accuracy | 31.98% |
| Cost-per-contact | 31.74% |
| Self-service (IVR, web) completion rate | 27.21% |
| Customer Dissatisfaction (DSAT) | 23.63% |
| Net-Promoter-Score (NPS) | 19.57% |
| Social media response rate | 8.11% |
| Deflection rate for proactive outbound | 3.58% |

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

In comparison, CSAT is considered to be the single most important metric that 22.5% collect and report on. Service level (11.6%) and quality (10.7%) were the only other metrics to garner double-digits, with FCR and ABA rounding out the top five.

Several respondents also mentioned that they are moving beyond CSAT to more advanced customer engagement metrics like net promoter score (NPS) and customer effort score (CES).

**When asked how this imperative data was measured, call monitoring (46.4%) and ACD reporting (35.7%) are the most common means, followed by:**

- Post-call email surveys – 17.7%
- Agent feedback – 16.7%
- CRM reports – 15.5%

"Organizations are data rich; they are data poor," says Barak Eilam, President of NICE Americas. "Data is accessible and it is accessible in real-time, but how do you take it from trending and reporting and push it to the day-to-day operations and the individual?"

**We asked if contact center agents needed and had access to key pieces of customer/company data and over 50% said they do for the following:**

- Historic or previous customer address information – 58.7%
- Other pertinent colleagues within the same company or location – 56.9%
- Accurate shipping contact information – 52.9%

Although not as highly available, but arguably more valuable – 42% have access to the name and address of a contact before conversing with them. Of those that don't, 18.5% said their agents need and want that information.

## EXPERT SPOTLIGHT

# Find Tuning Your Contact Center Through the Innovative Use of Metrics

*By Justin Robbins, Manager, Training & Development, ICMI*

Our quest for knowledge, our need for information, and the ability to obtain it much more easily, quickly, and frequently, has crippled our ability to use it effectively. We've forgotten (assuming we knew in the first place) what metrics deserve our time and attention and how to appropriately implement a system to keep track of them all. Our contact centers, by and large, exist to serve a customer base (internally and/or externally) and if we aren't able to identify which metrics impact that customer's experience , and in which way they do so, we engage in a destructive cycle of wasting our own time and resources. This then begs the question, how do we break the cycle? How do we implement or improve our CRM system to ensure that we're getting to the valuable information? How do we ensure that we're utilizing it to drive change and improvement?

It begins with simplicity. If we were to take a look at our reports and processes, the ways in which we communicate information and the goals that we're targeting, can we identify the waste and excess? Can we look back at all of the information we've captured and determine what we've actually used in meaningful ways and what we've done nothing more than "report on"? A great starting point is to sort out which metrics are the "must measures" for our contact centers. They are First Contact Resolution, Service Level/Response Time, Adherence to Schedule, Forecasting Accuracy, Self-Service Accessibility, Contact Quality, and Customer Satisfaction. While these are not the "only" things we should measure, these are absolute essentials and if we aren't measuring these things, it is where we need to start.

Once we've set the foundation of "what" to measure, we need to establish the parts in which the real value of metrics lie, "why" they matter and "how" we'll recognize success. As I mentioned previously, we have a ton of things that we can measure (that doesn't mean we should...) and I've since focused that list to the fundamental starting point of "what" we should measure. The "why" is all about effective communication. We need to recognize early on that not everything we measure matters to everyone and certain metrics matter in different ways to different individuals. In order to see these metrics drive success, we must share relevance with each stakeholder (whether it's an

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

agent, a supervisor, or your CEO) and explain the impact and role that they play. I seriously challenge us to consider whether it is worth sharing a statistic or metric with someone when they a) can't impact it and b) don't care about it. It is our responsibility to hold people accountable for the things in which they can impact and influence, provide the appropriate tools and resources to realistically achieve those objectives, and (and this part is crucial) make the connection between the center's (and organizations) goals or key focuses and the way in which the metrics we're measuring impact those goals. If the metrics aren't contributing to the efficiency of our contact centers and can't be correlated to our greater goals and objectives, why are we bothering to measure them? If you don't have a good answer – I do – don't bother and stop wasting your time!

The last component to seeing real success from any metric is identifying what achievement "looks like". Contrary to popular belief, just hitting a percentage or reaching a quota isn't achievement, just as the ability to mark off a check-box doesn't indicate a job well done. We are caught up in the perception that our jobs are very "task-based". We believe that we have fulfilled our responsibilities as long as the numbers "look good" and, as result, just became skilled in the art of data manipulation. I will speak for myself here, but this trend is both disturbing and unacceptable if we dare to call ourselves "customer–centric" organizations. Achievement and success through a metric only comes when we have identified the goal or objective that it impacts, identify which behaviors positively contribute to achieving the goal or objective, provide training, tools, and coaching to drive more of the desired behaviors, experience adoption of those behaviors by our staff and, in turn, see improvement in the metric. If you want your business to see future growth and sustenance, it isn't as easy as "we hit our numbers this month". You absolutely must, for every metric you measure, be able to provide this end to end insight.

By having clarity of focus, aligned objectives, and meaningful measurements, you will position yourself ahead of the competition. It may seem like a lot of effort is required to get to this point, and you're correct in that assumption. While being the "best of the best" doesn't come easily, it is worth it. From improved customer satisfaction to enhanced employee engagement, the leading contact centers have the ability to take the numbers on a page and use them to tell a story. Your numbers are already telling a story too, but whether it's a fairy tale, or a tragedy, is up to you. Are you prepared to take charge of the "what", "why", and "how" in your contact center or will you admit defeat?

While it is important for the contact center to be collecting and sharing real-time customer insight across their organization, customers and agents, it is even more important that the data be accurate.
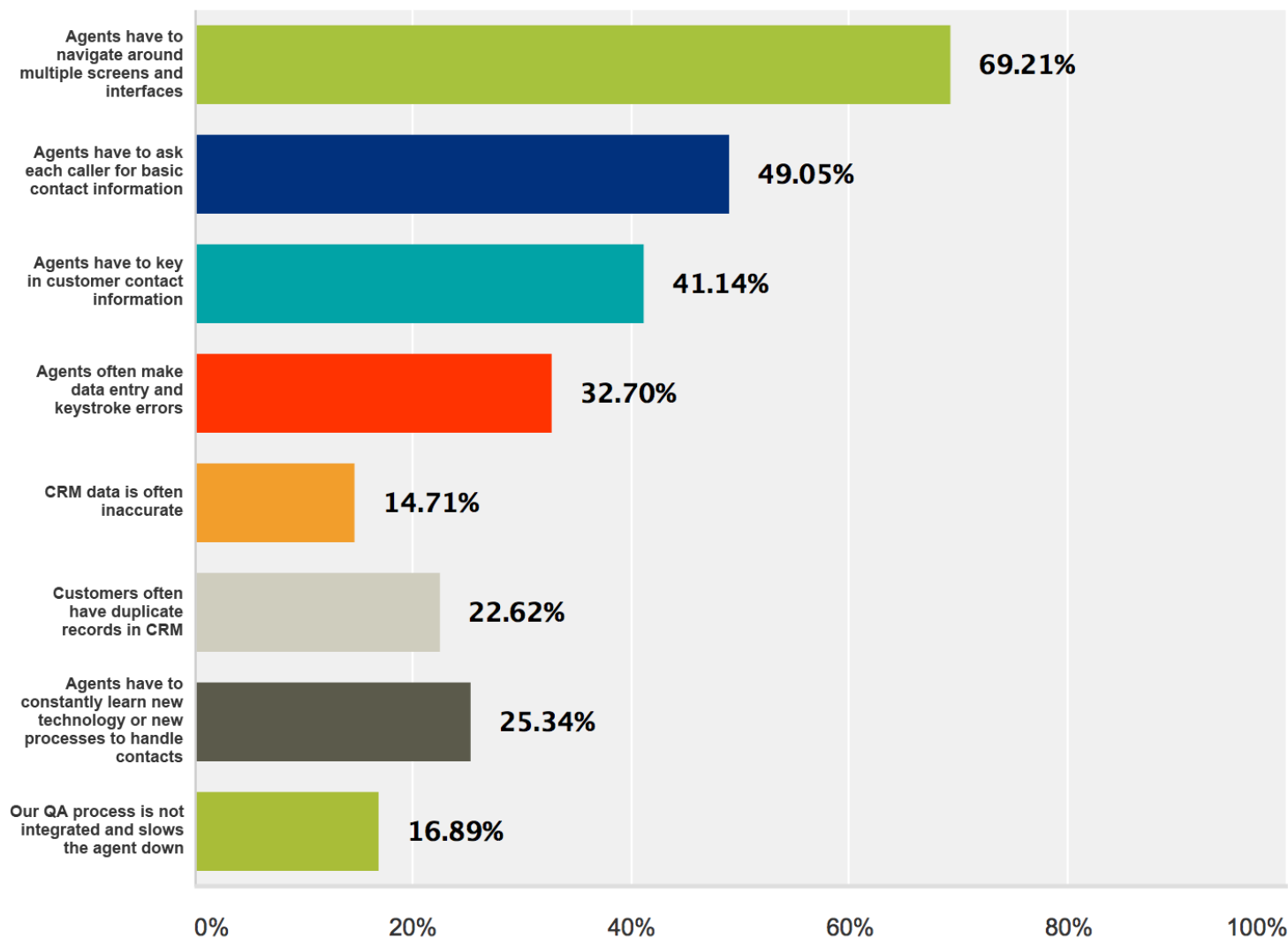
While only 5.8% said their biggest data collection challenge was too little data collected because of agent error or inconsistency, 14.7% acknowledge that their customer relationship management (CRM) data is inaccurate, 22.6% say duplicate customer records exist in their CRM, and 32.7% admit agents are frequently making data entry and keystroke errors.

"Contact centers are experiencing big data overload, and because of this, operations are not as efficient as they could be. According to the study, many agents believe they can't handle the volume of data that is in front of them, yet they're not given the right tools and guidance to extract the vital pieces of data that they need," said Paris at WhitePages.

**2013 REPORT**

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# Why is this happening?

A great many (69.1%) agents are navigating around multiple screens and interfaces in order to locate information, almost half (49.1%) are asking each caller for basic contact information, and 41.1% are manually keying in customer contact information.

## What agent productivity/efficiency challenges currently exist in your contact center?

| Challenge | Percentage |
|---|---|
| Agents have to navigate around multiple screens and interfaces | 69.21% |
| Agents have to ask each caller for basic contact information | 49.05% |
| Agents have to key in customer contact information | 41.14% |
| Agents often make data entry and keystroke errors | 32.70% |
| CRM data is often inaccurate | 14.71% |
| Customers often have duplicate records in CRM | 22.62% |
| Agents have to constantly learn new technology or new processes to handle contacts | 25.34% |
| Our QA process is not integrated and slows the agent down | 16.89% |

"The research proves that contact centers are not using customer time wisely," said John Neely, Director of Accounts at WhitePages. "When it comes to gathering basic contact information, nearly half of all agents have to ask for basic data, like phone numbers or addresses that should have already been at their fingertips. Keying in that information is a large drain on operational efficiencies and also leaves more room for data entry error. While it's not always efficient to add technologies to call center operations, there are a few simple ways they can receive data in real-time so agents can be more effective."

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# THE CUSTOMER JOURNEY
## Linking Experience and Engagement

An agent's happiness, satisfaction and engagement is influenced greatly by the daily life inside the contact center. A loss of engagement typically manifests in less than desired behaviors that are then reflected in a degradation of standard metrics - schedule adherence, quality, utilization, activity compliance, CSAT and attrition.

So in order to fully map out the customer journey, one also has to understand the agent's experience and the ultimate impact on the customer experience.

In early 2013, ICMI conducted a research study to better understand how contact centers intended to use emerging channels to improve the overall customer service experience and increase customer engagement. There was an emphasis on the activities and objectives around supporting customers in a multichannel environment, with an additional correlation of each emerging channel back to experience, efficiency and engagement.

While analyzing the statistics, ICMI kept noticing a trend threaded through the responses. And while it isn't groundbreaking, it is a fantastic reminder of what is usually at the core of customer satisfaction and engagement - the agent. To extrapolate further, it is the agent experience that genuinely impacts the customer's experience. More specifically, it is the agent experience that impacts agent happiness, which powers the customer experience, which builds customer engagement, which ultimately influences the customer's lifetime value to the brand.

So throughout the year, ICMI has been asking the customer service leader, "Does your contact center believe that happy agents make happy customers?" In this latest survey, 89.5% said they do, with another 8.8% saying that it depends and only 1.8% not agreeing to the correlation.

**Does your contact center believe that happy agents make happy customers?**

| | |
|---|---|
| Yes | 89.45% |
| No | 1.76% |
| Depends - too many variables | 8.79% |

0%   20%   40%   60%   80%   100%
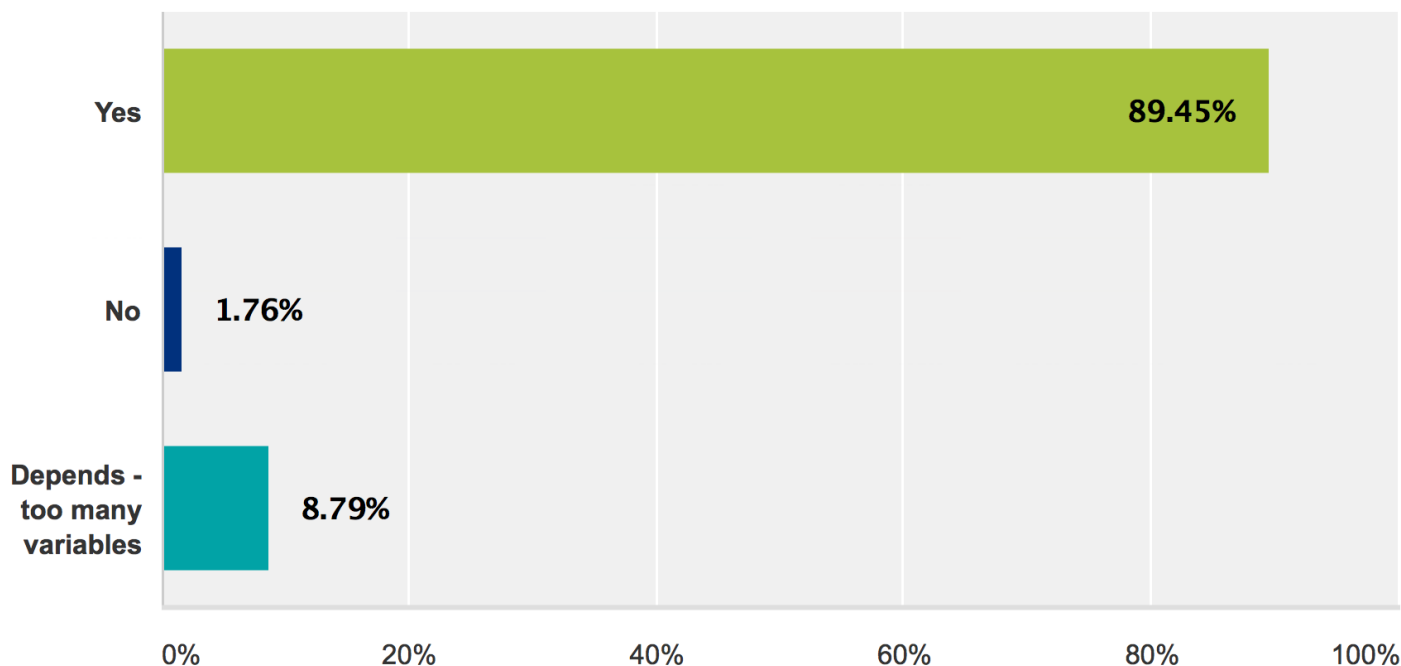
Additionally, 79.6% said their contact center has identified linkages between employee engagement/satisfaction and a better customer experience.

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Has your contact center identified linkages between employee engagement/satisfaction and a better customer experience?

No
20.35%

Yes
79.65%
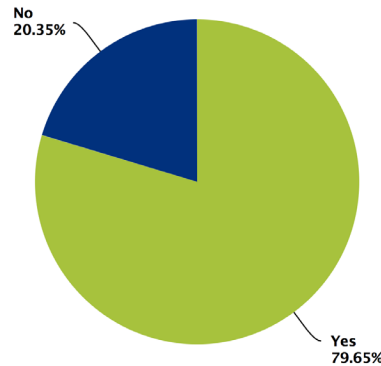
Now how does this all tie back to data?

It's obviously imperative that any multichannel strategy take into account the agent experience, and an effective way of doing so is reviewing the data that best illustrates that. Throughout this report you'll find technology and processes that lead to the metrics that provide insight into the agent experience, and likewise into that of the customer and their engagement.

# Obstructing the 360-Degree View

According to Richard Snow, VP and Research Director at Ventana Research, the biggest obstacle to mapping the customer journey is the sheer volume and variety of customer data. "A sometimes bewildering number of data sources contribute to the typical enterprise's customer data stores," he says. Snow goes on to say that it's primarily the unstructured sources of data that cloud the contact center's view.

When ICMI asked, "What is the top data collection challenge facing your contact center today?" we essentially heard the same lamentations. The top response was too much data being collected from too many disparate sources and no good way to consolidate it, while the second was too much data and no time to manually parse it and report on it.

In other cases, the collection of data is inhibited by the channel itself. Modern customer data ranges from transaction data, to emotional gauges, to satisfaction, and to predictive indicators such as the intent to attrite or willingness to recommend. Organizations need to access all this data and across all channels, particularly those with the largest reach and influence like social and community forums.

ICMI acknowledges that it can be challenging to establish the proper data and metrics (speed-of-answer, need-to-answer, containment) for channels like social media and portal/community moderation. This is where tools that utilize text analytics to analyze written communication channels can be helpful. These applications are not yet commonplace, but we anticipate an uptick in 2014 as more self-help and social mediums are adopted for customer service.

Right now only 20.3% of contact centers are using text analytics, with another 17.9% either in the implementation or planning phases.

As with any added channel, organizations need to invest in tools and agent knowledge so that consumers receive a consistent experience. With social in particular, technology can greatly assist with sifting through the massive volume of interactions to identify the most relevant postings that require attention and personalized responses.

As Lauren Ziskie, the Customer Engagement Officer at Dialogue Marketing said in an ICMI webinar, "There's a lot of noise in the social media landscape. Not all conversations are going to be relevant or add value. "Your challenge," she continues, "is to find the actionable posts and prioritize them in order of relevancy, recency, influence, brand risk and value."

All sources of customer information should be shared across the organization quickly and in whatever method is most useful for that department and team. Many activities that deal with customers require the information to be available in real time or near real time.

**2013 REPORT**

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# Partnering on the Customer Journey

The customer journey doesn't always take place within the confines of the contact center's prevue, which is why it's important to look at all facets of their relationship with you.

"Analyzing data is great. Understanding the customer journey is amazing," iterates Rozenblat from NICE. "But we need more. We need to eliminate unnecessary contacts and improve the customer experience. That requires marketing, product, technology, sales, and every other department to be involved."

As one survey respondent said, "Some of our most actionable data comes from outside of the call center, and is focused around how and why customers are using the call center in general. Huge insights gained in this area help change what questions come through and help agents be prepared for the contacts."

So while this document focuses primarily on the contact center's role along the customer journey, this information is more impactful when used as a component of an organizational customer strategy.

**EXPERT SPOTLIGHT**

# Reporting Contact Center Activity

*By Brad Cleveland, Senior Advisor and Founding Partner, ICMI*

Reporting contact center activity to senior level management and others in the organization can seem a daunting task. The wide variety of activities in a typical center, the reality of senior management not having the time to pour over detailed reports, and the fact that summary reports often gloss over important information, all contribute to the challenge. Consequently, many diligently prepared reports either go unread or, worse, are misunderstood.

Clearly, good communication doesn't happen just because detailed information is available. Any manager buried in system reports yet struggling to convey basic realities can testify to that fact. As with budgets, the process you establish to communicate ongoing contact center activity is as important as the information itself. The following steps can help you identify and prepare meaningful reports and ensure that they are understood.

## 1. DETERMINE YOUR OBJECTIVES

What are the objectives for the reports? In other words, what should other managers know about the contact center or the information it has acquired, and why? To find the answers, assemble a team for a working discussion. A cross-section of managers from across the organization, contact center managers, supervisors and agents should be involved.

**General areas of concern usually include:**

- Customer satisfaction and sentiment analysis
- Quality measurements
- Contributions to other business units
- Access alternatives and workload trends
- Costs and revenues
- Queue reports (such as service level and abandonment)
- Resource utilization and requirements (e.g., staffing and scheduling needs)

From these major categories, important measurements will emerge. It's often useful to preface this exercise with a question like, "If we could wave a magic wand, what would we really want to know about our contact center?" At this stage, don't be concerned about whether or not you have the reports to support the objectives you identify. Your objectives — not the reports you happen to have — should drive this process.

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## 2. IDENTIFY SUPPORTING INFORMATION

List the possible reporting alternatives under each of the objectives you identified in the first step. Include information from systems, databases, surveys, other departments and external information.

The challenge now becomes one of selection. Stephanie Winston, author of the classic book, The Organized Executive, advises that a report should not simply collect facts, but serve as a judgment tool for management. To pare down the lists, Winston suggests asking a variety of questions: Is the report really necessary? What questions does it answer? Which reports would you dispense with if you had to pay for them? Could several reports be combined? Will you act on the information to affect change?

## 3. PUT THE INFORMATION IN A USER-FRIENDLY FORMAT

Once you have a list of desired reports, the next step is to compile them into a simple, understandable format. This often means creating graphs of the information. For example, simple line charts can illustrate trends that would otherwise appear as hard-to-decipher numbers. Reports that rely on graphs may take more pages, but a 10-page report consisting primarily of graphs is often quicker to read and easier to comprehend than two pages of detailed numbers in rows and columns. Look for data that can be combined or contrasted to provide a more complete story.

## 4. CLARIFY INFORMATION THAT COULD BE MISLEADING

As any seasoned contact center manager has learned, you can make reports show whatever you want. For example, you can prop up service level by overflowing calls to other groups, changing distribution priorities, or taking messages for later callbacks. Or you can provide overall reports or select timeframes that combine data and conceal problematic intervals. Clearly, simply providing a high-level report on service level or quality can be misleading. The reader needs more information.

## 5. ANNOTATE EXCEPTIONS

There will be points that are clearly out of the norm. Don't leave your audience guessing. Explain deviations, both what happened and why. Why did wait times go through the roof in early February? A simple footnote can provide the answer: "Power outage in Northeast; workload 40 percent higher than normal."

## 6. AUGMENT REPORTS WITH PRACTICAL EXPERIENCES

Giving recipients a report to read on what happens on Monday mornings versus bringing them into the center to observe what happens is the difference between night and day. You need to do both. Teaching key contact center dynamics to managers outside the center is necessary to create a clear understanding of how cross-functional decisions and actions link with the center's overall effectiveness. And contact center executives need a solid understanding of the concerns, challenges and objectives in other areas of the organization. This mutual understanding forms a strong and essential foundation for effective reporting and communication.

## 7. ORGANIZE AN ONGOING FORUM FOR DISCUSSING AND ACTING ON THE INFORMATION

Presenting data in a clear, concise and actionable format is a start. But reports must be followed with a forum for discussing and acting on the information. This becomes the primary opportunity to turn information into sound business decisions. If there's one overall message, it's this: Effective reporting is an ongoing communication process. It's not an end result.

## THE REPORTING PROCESS

- Determine reporting objectives
- Identify supporting information
- Put information into user-friendly format
- Clarify information that could be misleading
- Annotate expectations
- Augment reports with practical experiences
- Organize a forum for discussion and decision

## YOU'RE LOOKIN' (TOO?) GOOD…

Reporting the contact center in the best possible light can undermine success. There are a lot of ways to produce reports so that the center looks as productive as possible to senior management. However, if you mask serious resource deficiencies or process problems, the center is less likely to get the resources and support it needs. That, in turn, will undermine the center's ability to perform. There's also the related issue of psychology — when upper-level managers see room for improvement, they tend to feel more assured they are getting the whole story.

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

2013 REPORT

# THE VALUE OF BETTER DATA

## 1. Better Data and Agent Productivity and Efficiency

Contact centers are measuring agent productivity primarily through five ways, with metrics (utilization, FCR) being the most common for 64.5%. Other indicators include one-on-one sessions with contact center management (37.9%), agent satisfaction and engagement surveys (36.3%), focus groups (21.1%) and desktop time-trials (16.5%).

### How have you measured agent productivity?

| Category | Value |
|---|---|
| Desktop time-trials | 20.05% |
| Agent satisfaction/engagement surveys | 36.31% |
| Focus groups | 21.14% |
| One-on-one sessions with contact center management | 37.94% |
| Metrics (utilization, FCR) | 64.50% |
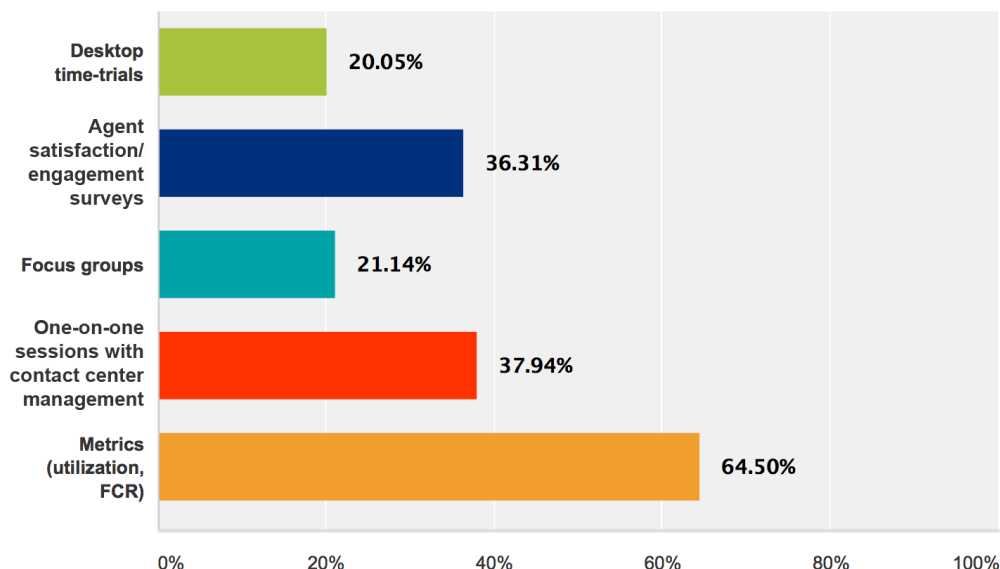
Most agree that productivity and efficiency challenges do exist and the most prevalent response by 69.2% was that agents have to navigate around multiple screens and interfaces.

In fact, when we specifically asked about CRM systems, those without one openly declared that agent productivity and efficiency was being somewhat (41.0%) or extremely (18.0%) affected in a negative fashion.

Navigation without a CRM to tie data together was the biggest (58.7%) impact to productivity and efficiency. Over half also say that agents are taking longer than needed to find contact information and that is resulting in higher AHT (36.5%) and ACW (33.3%).

Even those with CRM are somewhat affected (39.0%) by productivity drains if their systems are antiquated or no longer integrated.

Similarly when we asked about simplifying the agent desktop system earlier in 2013, 72.8% responded that agents still toggle between multiple applications.

**In fact, the average number of applications that an agent uses to manage all customer service channels is five, and the complete breakdown is as follows:**

- 2-3 applications – 39.7%
- 4-6 applications – 37.7%
- 7-9 applications – 12.5%
- 10-15 applications- 3.2%
- >15 applications – 6.8%

## 2013 REPORT

## A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

The argument for a simplified agent desktop system is strong, and when ICMI asked the community to select their primary reasons for implementing one, those that rose to the top all circled back to agent and customer experience. It's clear that this technology investment is recognized as a tool to extreme engagement and productivity.

**"What are the 3 primary reasons your company was motivated to implement a unified desktop system?"**
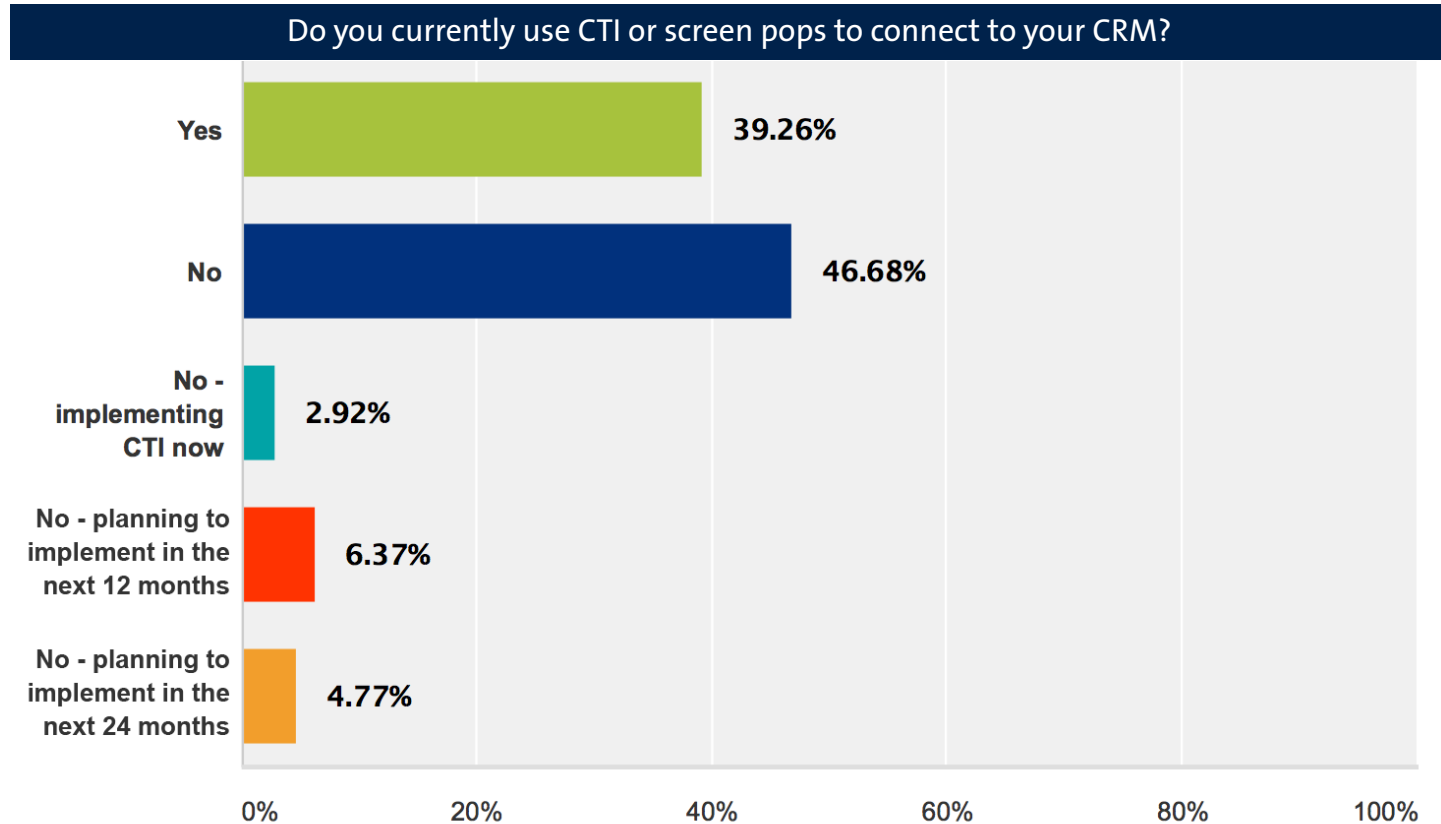
1. To improve the overall agent experience – 56.9%

2. To improve customer satisfaction – 51.4%

3. To improve first-contact-resolution (FCR) – 48.6%

Computer telephony integration (CTI) or screen pops built into the CRM can also assist with productivity and efficiency. Although the CTI terminology may now seem outdated, the concept of proactively supplying information prior to a connection is possibly now more relevant than ever.

**Inbound CTI applications typically provide the ability to do one or more of the following:**
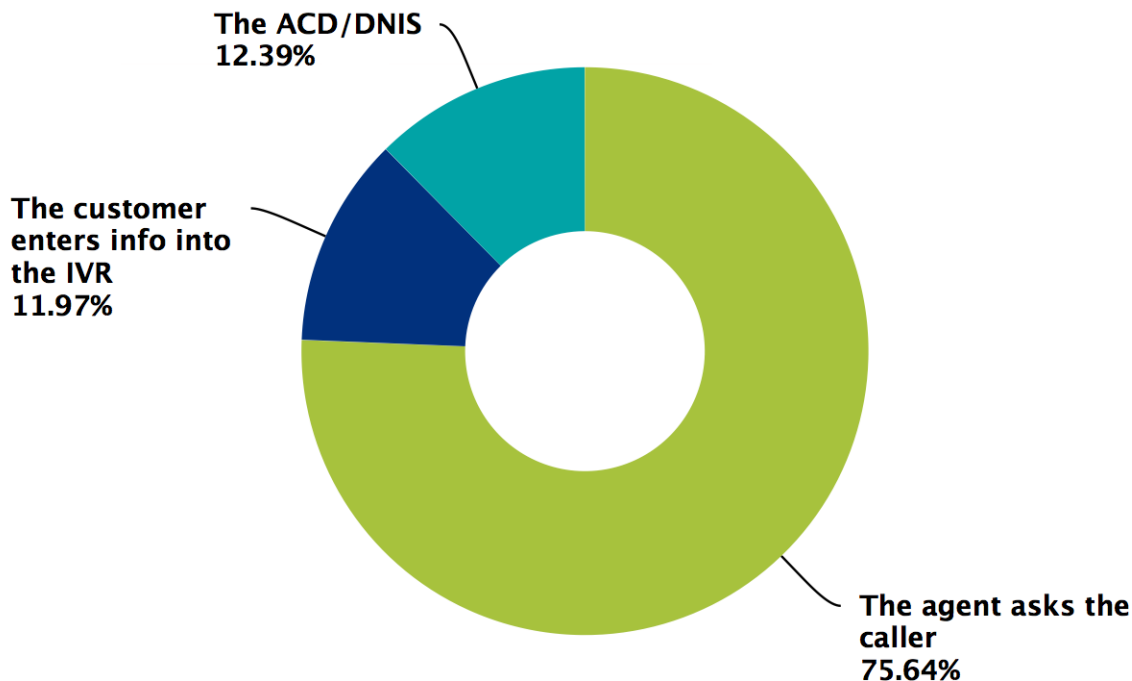
• Recognize a number, touch-tone entered input, or voice for authentication or call routing

• Provide interactive voice response (IVR) to callers

• Match the number of a caller with a customer record and display it for the agent as a 'screen pop' reference prior to talking to the caller

• Automate a smart agent application to provide help with the caller's request

Even though CTI applications debuted in the late 1980s, only 39.3% of responding contact centers presently have such technology in place and just 14.1% are implementing or planning to do so within the next 12-24 months.

### Do you currently use CTI or screen pops to connect to your CRM?

| | |
|---|---|
| Yes | 39.26% |
| No | 46.68% |
| No - implementing CTI now | 2.92% |
| No - planning to implement in the next 12 months | 6.37% |
| No - planning to implement in the next 24 months | 4.77% |

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
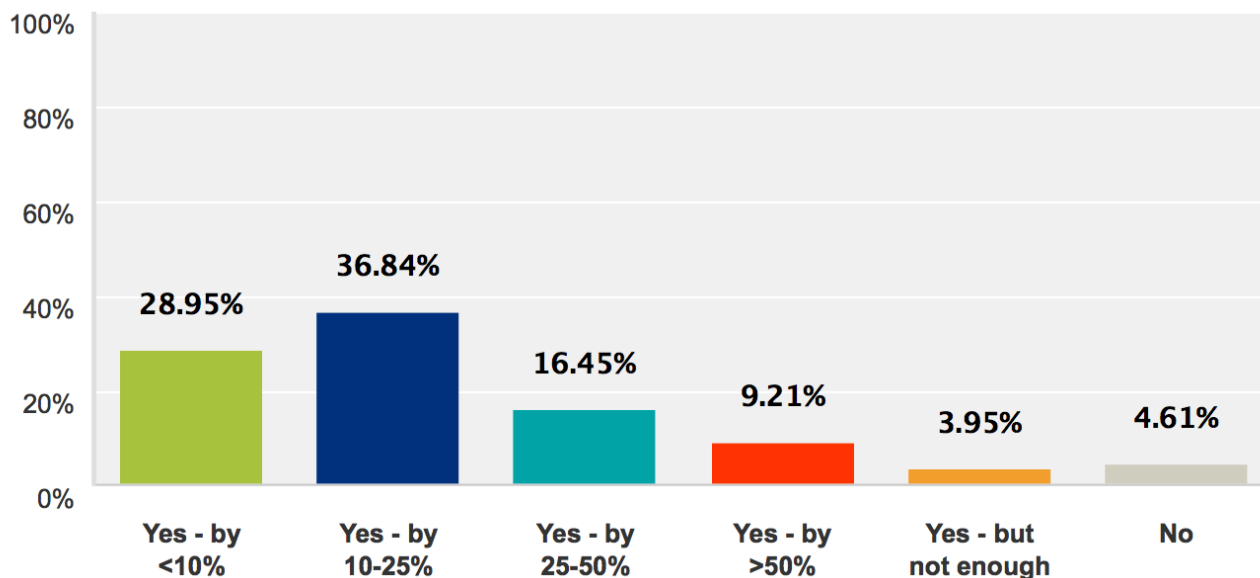*Research Report and Best Practices Guide*

For the almost half of respondents (46.7%) that neither have nor are planning CTI, over three-quarters (75.6%) still have agents manually asking for customer identification. Another 12.4% identify callers through their ACD/DNIS and 12.0% do so when the customer speaks or keys information into an IVR.

## How do you identify people who call in?



**The ACD/DNIS**
**12.39%**

**The customer enters info into the IVR**
**11.97%**

**The agent asks the caller**
**75.64%**

The value CTI provides is rather evident! A mere 4.6% of contact center leaders that have CTI said that it does not increase agent output, and just 4% said that the gains weren't worthy of the investment. Of the 91.5% that do see the value, they report substantial gains in agent productivity and efficiency. 36.8% show a 10-25% improvement, 16.45% by 25-50%, and 9.2% by greater than 50%! Another 29.0% say the improvement is less than 10% but still worthy of the technology investment.

## Do CTI (screen pops) increase overall agent productivity and efficiency?



| | | | | | |
|---|---|---|---|---|---|
| 28.95% | 36.84% | 16.45% | 9.21% | 3.95% | 4.61% |
| Yes - by <10% | Yes - by 10-25% | Yes - by 25-50% | Yes - by >50% | Yes - but not enough | No |

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

Furthermore, the impact of CTI is evidenced in productivity and efficiency KPIs. 68.5% saw a positive improvement in average handle time (AHT) and 27.5% in agent utilization.

What is possibly the most important outcome of understanding the drivers of agent efficiency and productivity? It's the linkage between operational productivity and efficiency, agent engagement (AE) and agent satisfaction (ASAT). This was indeed confirmed by 79.7% of survey respondents, and it's a 14% jump from when ICMI asked this same question earlier in 2013.



**Has your contact center identified linkages between employee engagement/satisfaction and operational efficiency?**
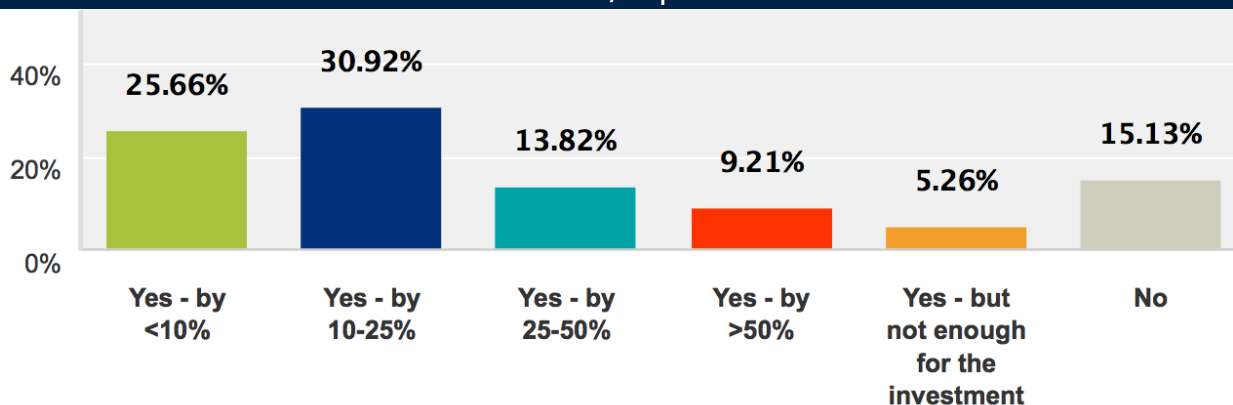
No 20.31%
Yes 79.69%
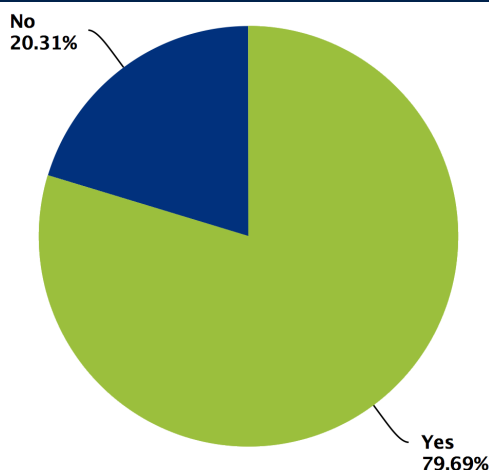
## 2. Better Data and Agent Accuracy

While 15.1% of those with CTI say that having customer contact info immediately available to an agent would not reduce redundant/duplicated CRM records, an impressive 84.9% say that it does. Of those, only 5.3% said the reduction wasn't worth the investment.

**The reduction in duplicate CRM records is reported to be improved by:**

• Less than 10% - 25.7%

• 10-25% - 30.9%

• 25-50% - 13.8%

• Greater than 50% - 9.2%



**Does having customer contact info immediately available to an agent reduce redundant/duplicate CRM records?**

| Yes - by <10% | Yes - by 10-25% | Yes - by 25-50% | Yes - by >50% | Yes - but not enough for the investment | No |
|---|---|---|---|---|---|
| 25.66% | 30.92% | 13.82% | 9.21% | 5.26% | 15.13% |

A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

2013 REPORT

Agents themselves agree, as their contact center leaders report them wanting fewer redundant and duplicate customer records within the CRM (26.9%) and more accurate customer information (25.5%).

Similarly, CTI's ability to provide customer contact information proactively to an agent is shown to reduce agent keystroke errors by 94.6% of responding contact centers. Only 8.2% of that group said the value wasn't enough, while 12.9% said it reduced errors by greater than 50%, 17.0% by 25-50%, 25.9% by 10-25%, and 30.6% saw a less than 10% improvement but still considered CTI worth the time and money.

It is here within agent accuracy where CTI really proves an impact on metrics. Contact center leaders reported a positive effect of the application on quality (51.7%), transfers and escalations (29.5%), first-contact-resolution (28.9%) and errors/rework (25.5%).

It's important to remember that over 60% of contact centers do not have the capability to provide customer contact information proactively to an agent prior to an interaction.

# 3. Better Data and Agent Performance

Gone are the days when simple performance metrics like average handle time, agent utilization, quality, and other efficiency-related metrics are good enough. Companies need metrics that show what impact agent behavior has on business outcomes. The challenge has been, and remains, that no one source of data is enough.

In a recent Ventana Research study on next-generation workforce optimization, Snow disclosed that 78% of organizations said it is very important to improve agent performance and that the top two drivers of such efforts relate to customers: improve the customer experience (86%) and improve customer satisfaction (72%).
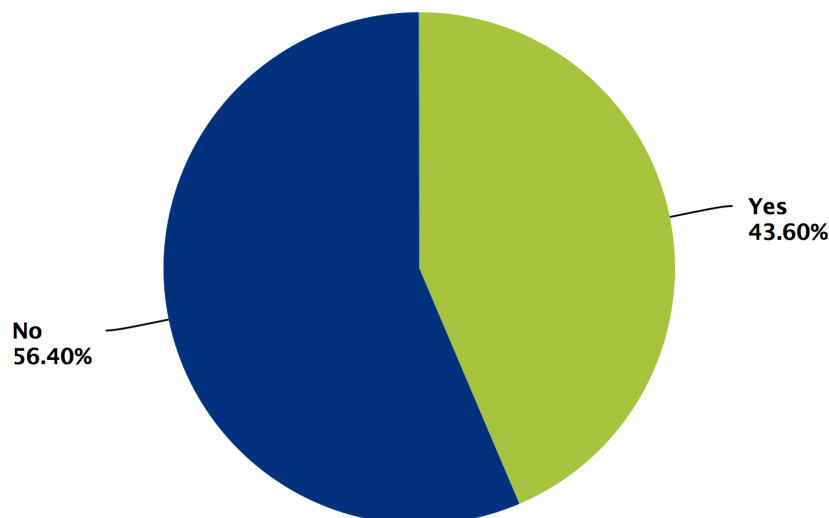
Our own research mirrors this, as our contact center community said that the two primary ways they use data is in managing overall agent performance (67.1%), and for identifying areas for customer satisfaction improvement (47.8%).

The importance of agent performance is clear in the 360-degree view of the customer. As we know, every interaction with an agent impacts the customer experience and their engagement.

Without proper measurements and guidelines, agents will inherently become frustrated, lose focus and engagement, and adopt behaviors that lead to errors, increased escalations, and lower schedule adherence.

For example, 43.6% report using data to identify agents who drive repeat calls. "Every team performs a repeat calls analysis on a daily basis to identify the repeat callers and the underlying agent reasons," said one contact center leader.

## Do you use data to identify agents who drive repeat calls?



Yes
43.60%

No
56.40%

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

Equally as important, is empowering the contact center management to have access to agent activity in near real-time, as 71.8% do.

### Do you use data to empower contact center managers with real-time key performance metrics?

No
28.25%

Yes
71.75%
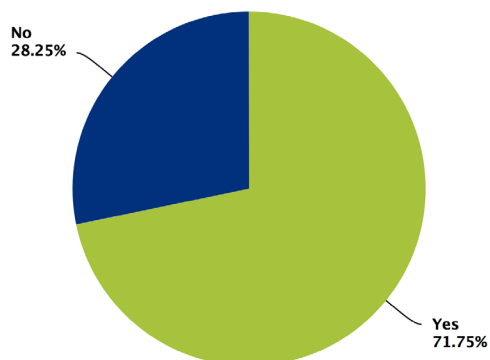
Once that performance data is collected, it is necessary for the contact center to take action on it. It is encouraging to see that a preponderance (93.3%) use metrics collected to take instructional actions with agents such as training and personalized coaching.

### Do you use this data to take corrective action on the agent, such as personalized training or coaching?

No
6.74%

Yes
93.26%
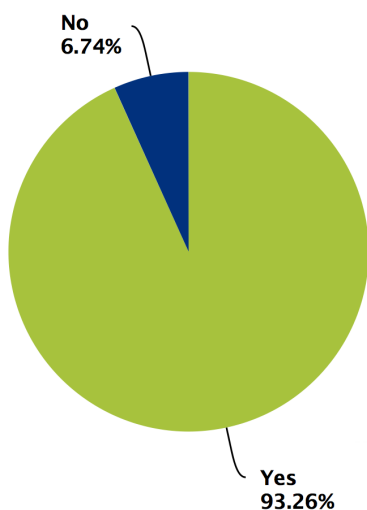
Customer feedback is also used by 76.5% to enhance agent training, primarily to improve an agent's ability to diagnosis and quickly reach issue resolution.

### Do you use customer feedback data to enhance agent training to improve diagnosis and issue resolution?

No
23.52%

Yes
76.48%
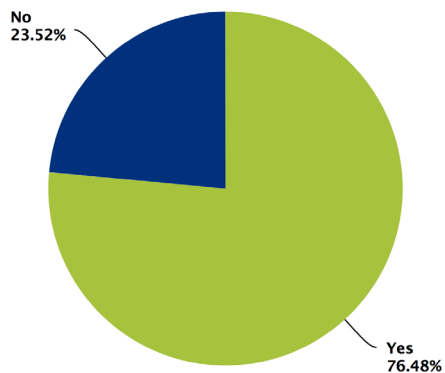
Tightened metric alignment between leadership and agents is more important than ever in the multichannel contact center. There can often be a misunderstanding between what the contact center is reporting, what their unspoken KPIs are, and what the agent is being measured on. Agents operate at a higher efficiency and productivity, and with greater concern for customer satisfaction, when they believe metrics are understandable and attainable.

# 4. Better Data and Customer Engagement

"Today's customers are more engaged and informed than ever before. This means that organizations must also become better educated about their customers. By employing big data insights from customer interactions and transactions, organizations can build a detailed picture of the customer journey, bringing them closer to their customers than ever before," says Barak Eilam, President of NICE Americas.

Companies can take the concept of data-driven customer interactions one step further by applying those insights to customer experiences in real-time. We talked earlier about how data can improve the efficiency and effectiveness of customer service agents, but data also helps improve customer engagement. It gives the impression that the customer is more than a transaction and that the brand is invested in the relationship with the customer.

While 65.3% of contact centers surveyed said their customers are moderately engaged with their company, only 26.3% consider customers extremely engaged with the brand.

## How actively engaged do you consider your customers to be with your company?
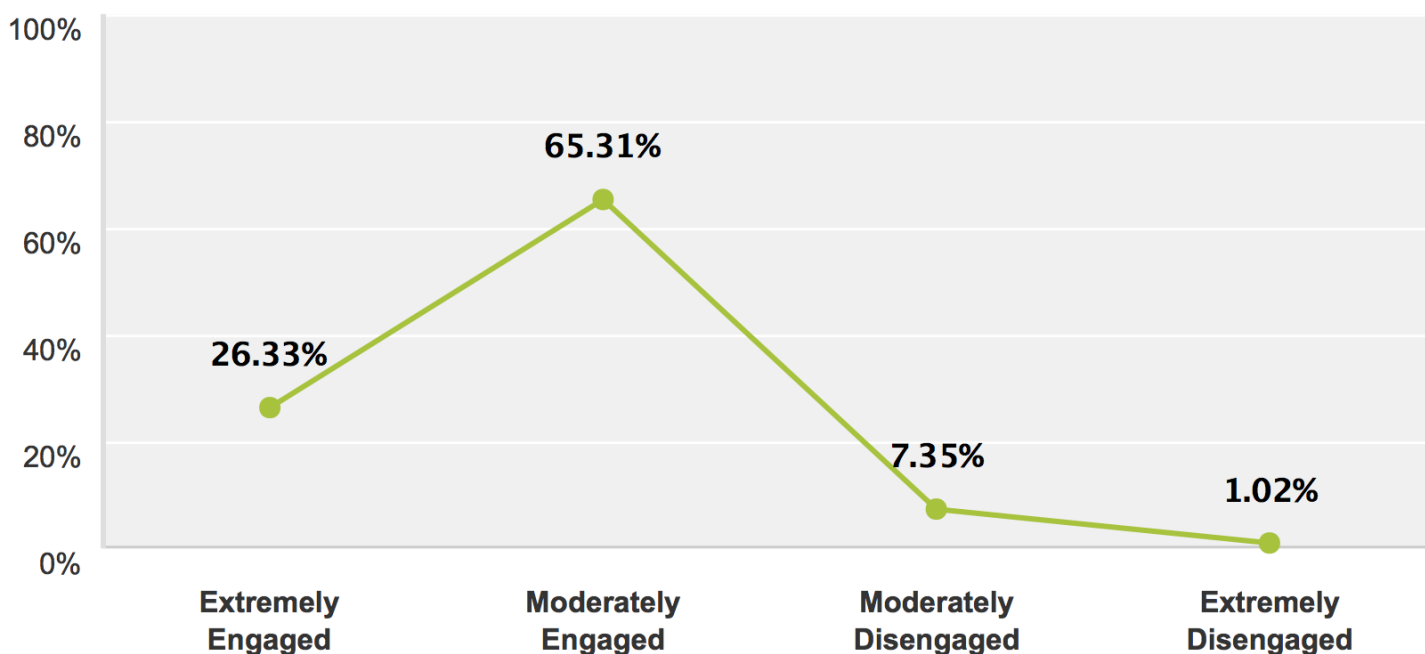


The question is then, "What do you need to do? What do you need to be asking? What data do you need to collect in order to increase that customer engagement?" As Jim Maloney, the General Director, Customer & Relationship Services (CARS) at General Motors says, "Data helps predict when there is an opportunity to change the customer engagement."

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

While only 29.9% collect and use engagement data, 62.3% feel that it helps create and improve engagement between the customers and agents.

**That valuable customer data consists of:**

- Average satisfaction of a contact
- Customer mood after an agent interaction
- Customer likes and dislikes
- Customer channel preferences
- Geographic location information of customer (weather, landmarks, news)
- Customer birthday
- Customer anniversary with the company
- Other personal customer information (pets, children, spouse)

## Does the above data help create engagement between your customers and your agents?

| | |
|---|---|
| Yes | 62.32% |
| No | 17.31% |
| N/A | 20.37% |
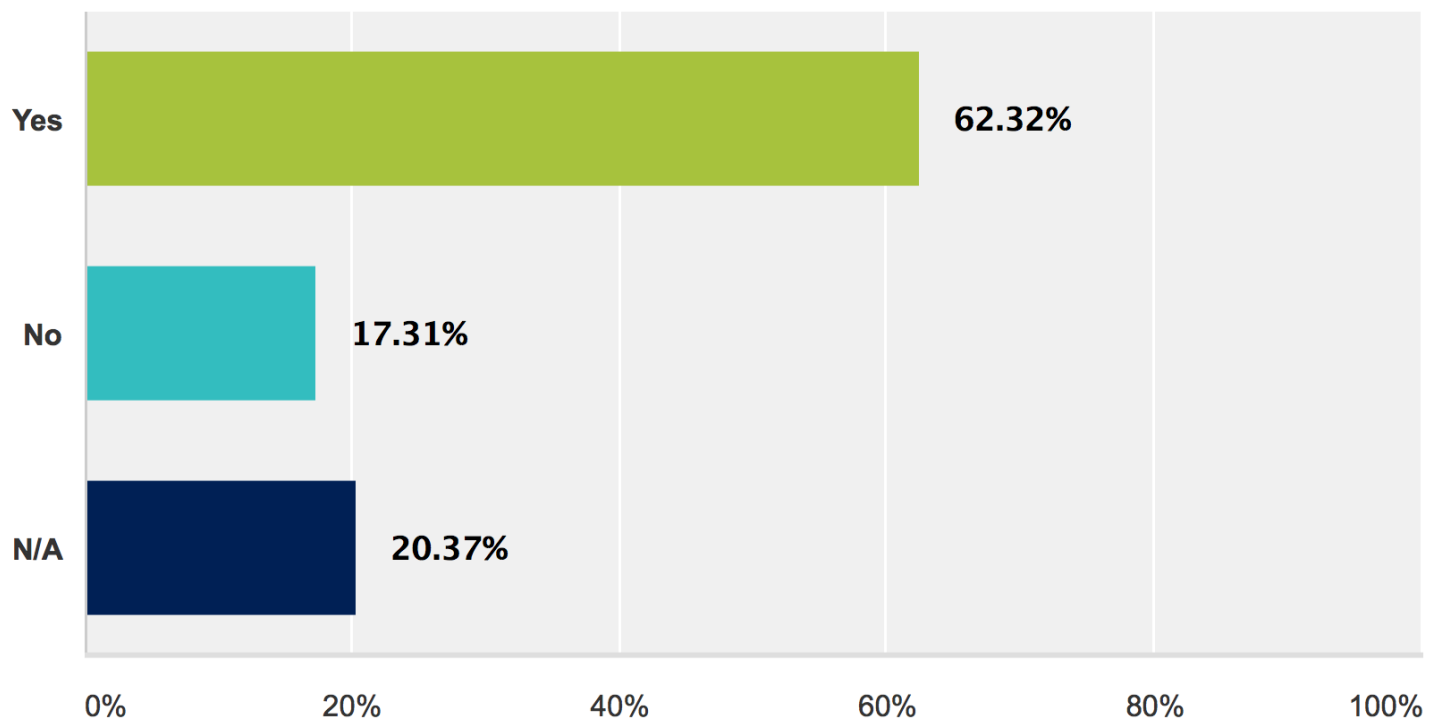
Unfortunately, another 20% collect the above information, yet do not leverage it.

Having a good customer relationship management (CRM) system is imperative in collecting and using engagement data, and one that we will talk about later in this report.

This is also where applications like CTI can benefit customer engagement, as 28.9% of contact centers saw correlated improvement to customer satisfaction with the technology.

Engagement can also be increased by using customer preference data to proactively move the interaction through the best channel and to the most adapt agent.

41.1% of organizations are using this data to direct customers to the best channel to handle their issue and likewise 42.3% are routing to specific agents

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Do you use customer preference data to determine and direct customers to the best channel(s) to handle their issue?

Yes
41.14%

No
58.86%
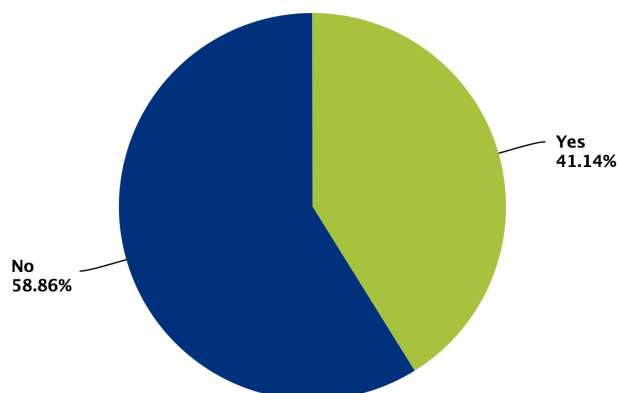
## Do you use customer preference data to determine and direct customers to the best agent(s) to handle their issue?

Yes
42.27%

No
57.73%
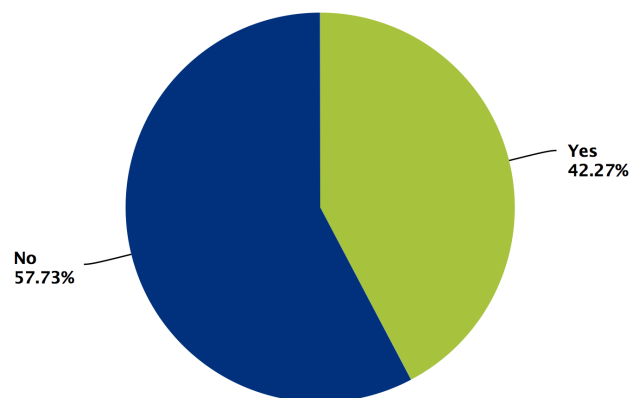
Another 71.6% are taking customer feedback and improving their escalation procedures. This is a perfect example of improving the journey as a customer is moved through an organization. As one respondent said, "It's vital that we let management know what the struggles of our customers are, where they are encountering these issues, and what we need to do to rectify them."

## Do you use customer feedback data to improve escalation procedures in your contact center?

No
28.41%

Yes
71.59%

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*
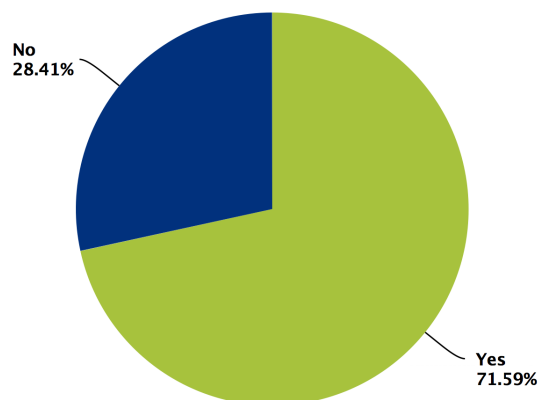
Finally, better data can help agents improve engagement with customers that have suffered through comprehension issues in the past. 76.2% of contact centers say their agents sometimes struggle with understanding customers due to accents or language barriers. (It's a substantial concern for over a quarter of respondents.) These centers could consider having the customer's name and country available to the agent before the connection to the customer is made. 15.6% are already doing so, and have seen an improvement in communication. Another 39.1% haven't considered it, but are open to trying.

# CREATE THE WOW CUSTOMER JOURNEY
## Analytics to Assist

Data review or analytics tools come in many formats. The most common for the contact center are text, speech, predicative and desktop.

While it is possible to use manual methods like time-trials and agent shadowing to understand the drivers behind productivity and efficiency decreases – navigation, engagement, confidence, technology, distractions – ICMI recommends utilizing agent desktop analytics tools to better measure activity. While only 35.2% of the call center community that responded to the survey currently uses desktop analytics, those that do are seeing the value in improving agent activities.

**"What ways are you using agent desktop analytics?"**

- To measure start and stop of agent desktop activities – 56.3%
- To trigger audio or screen recordings based on desktop events – 55.7%
- To track information such as account number or transaction value from the agent desktop onto a call recording – 41.4%

Snow from Ventana Research recommends using agent desktop analytics to close the loop between agent activity and the action needed to improve outcomes in the future. With this best practice, patterns can be identified in the data to determine how employees actually spend their time. One can see what applications they access, what data they enter, how much time they spend in each application, and how much time an agent is idle.

Budget limitations and the perceived inability to prove the value of analytics is what holds many back from making the investment. As one respondent stated, "This is dependent on budget and organizational financial changes. We have certainly looked into this but the ROI can be tough to justify. Desktop tools for customer service must clearly translate to more money and better organizational health."

29.2% say they are in the consideration or implementation phase of agent desktop analytics.

Of all the data review tools, those that analyze speech patterns and language have debatably been more utilized than desktop activity and text in recent years. Modern QA and recording systems often have them built in as features.

**The most common usage of speech analytics are:**

- After-the-call business analysis – 54.2%
- Tool to decide what calls should go through quality management – 43.1%
- Real-time agent guidance (real-time analytics during call) – 34.7%
- Real-time supervisor alerts (real-time analytics during call) – 30.6%
- Automated Quality / Compliance checks – 26.0%

While 75.6% have call recording in place and over half (51.7%) are utilizing the screen capture function of the software, only 21.0% are currently taking advantage of the speech analytics engine.

## 2013 REPORT

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Do you currently use any type of speech analytics?

Yes
21.04%

No – we are in the implementation stage
7.79%

No – we have no plans to add speech analytics
58.70%

No – we are planning to add in the next 12 months
12.47%
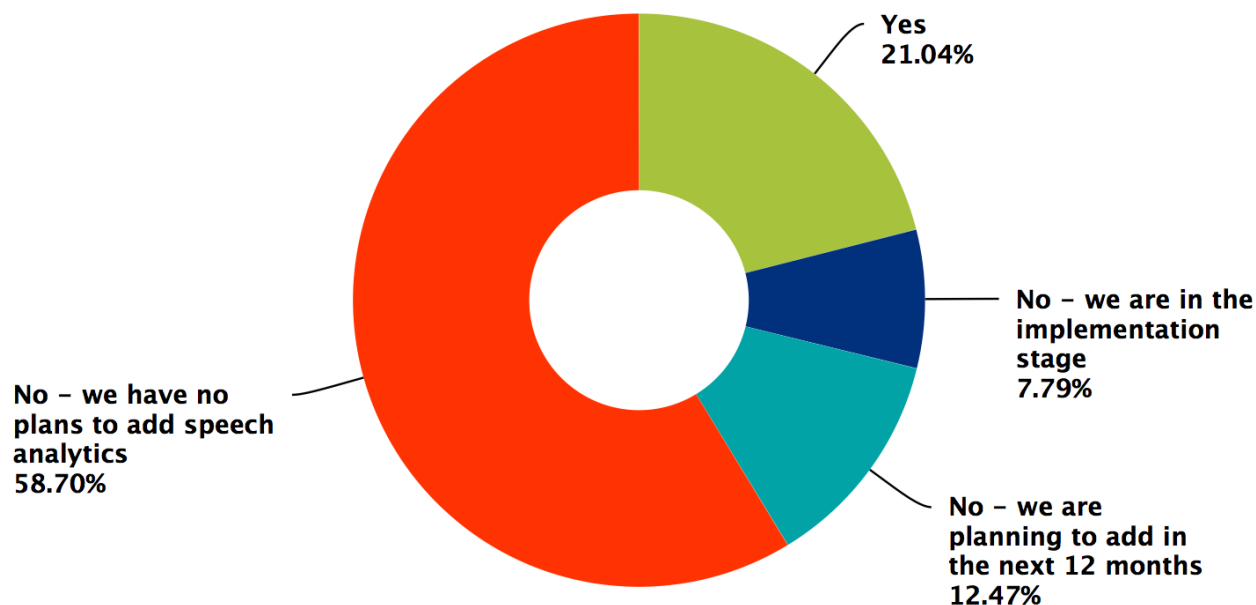
# Eliminate Unnecessary Data

It's just as important to know what data not to report on as it is to know what you should be considering.

"Do you consistently collect and report on metrics that you don't regularly use?" ICMI asked the community. Almost half (48.1%) said yes!

## Do you consistently collect and report on metrics that you don't regularly use?

No
51.90%

Yes
48.10%
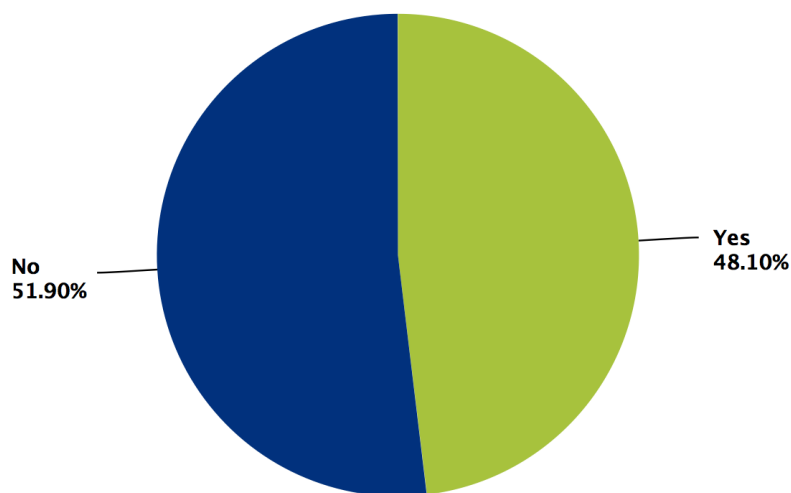
While the list of "unused" measurements was long, a few stood out as potentially less needed than others.

- Average speed of answer (ASA)
- After call work (ACW)
- Average handle time (AHT)
- Agent occupancy
- Cost-per-contact

**2013 REPORT**
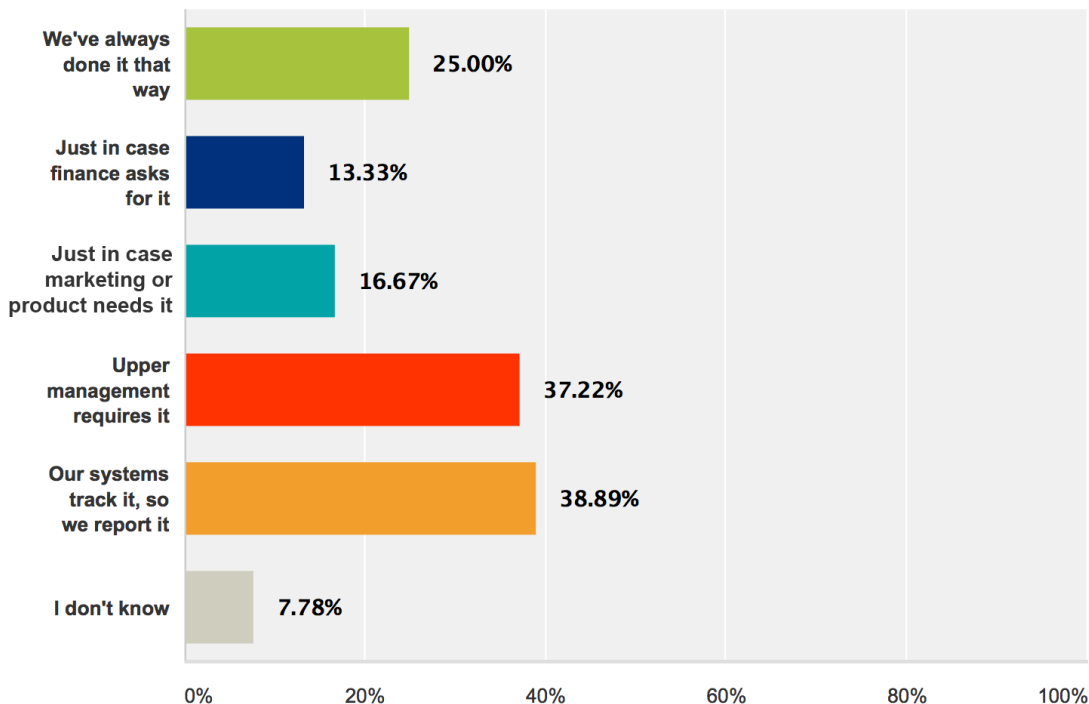
A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

When asked why the contact center was still collecting and reporting on data that they don't regularly use, 38.9% said it is because their systems track it, so they report on it, 37.2% said management requires it, 16.7% said it was in case marketing or product needed it, and 13.3% have it on-the-ready for finance. A quarter of respondents said it was because, "we've always done it that way," and 7.8% simply didn't know.

## Why do you collect and report on data you don't regularly need or use?

| Category | Percentage |
|---|---|
| We've always done it that way | 25.00% |
| Just in case finance asks for it | 13.33% |
| Just in case marketing or product needs it | 16.67% |
| Upper management requires it | 37.22% |
| Our systems track it, so we report it | 38.89% |
| I don't know | 7.78% |

Additionally, while you may be collecting every channel nuance, you shouldn't share or create KPIs around those that do not provide management insight or aid in business strategy decisions. For example, only 19.9% said that wasted time would be reduced if they knew if an inbound call was from an auto-dialer. 57.8% said that auto-dialer calls are not an issue and 22.3% said that they get them, but that the impact is irrelevant. In this scenario, it's not necessary to report on this data point unless the volume or impact becomes relevant in the future.

## Does knowing if an inbound call was from an auto-dialer reduce wasted time?
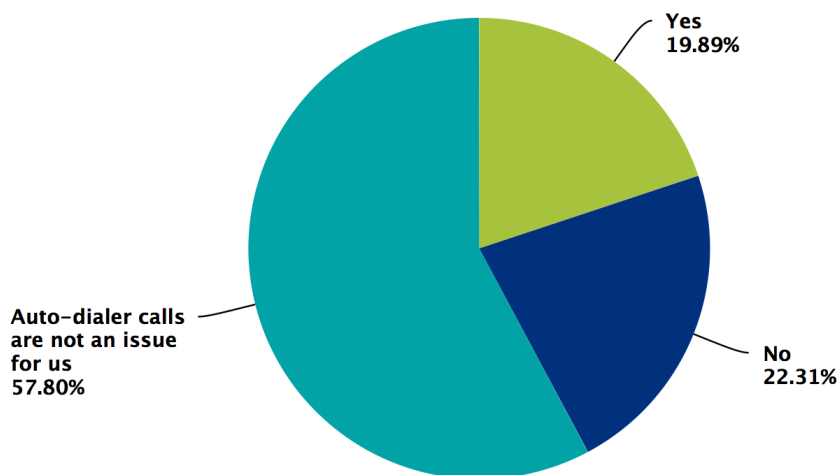
- Yes 19.89%
- No 22.31%
- Auto-dialer calls are not an issue for us 57.80%

As your contact center evolves, you must ask yourself if the measures of performance that have served you well in the last decade are the same ones that will determine how well your contact center is operating today.

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# Make Data Accessible

There are so many different ways that the data collected by the contact center can be leveraged, but it can be daunting and somewhat useless if not collected in a retrievable and measurable way.

Companies now recognize the importance in improving tools that produce the intended customer experience. These tools must provide real-time visibility into customer-related activities and company-related updates that impact both agents and customers. Increasingly, there is also a need for tools that allow groups to retrieve information simultaneously and collaborate on the resolution of issues.

At the simplistic level, agents need fast and easy access to necessary data, and that includes internally created content that aids an agent in a customer interaction. This can be a knowledgebase, internal portal or repository, or a customer relationship management (CRM) system.
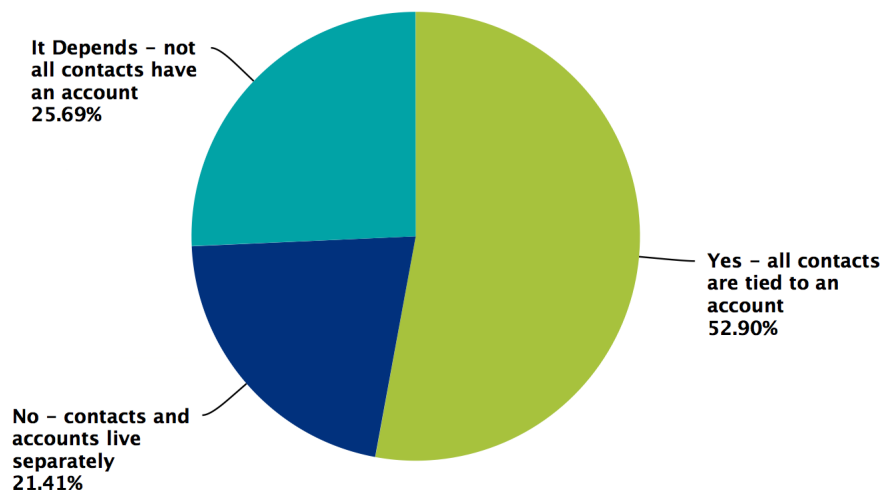
Just over ½ (54.0%) of organizations surveyed have an internal centralized repository for product and service information, while 84.0% have a CRM platform.

**Do you use data to create a centralized repository of product/service information?**

No
46.05%

Yes
53.95%
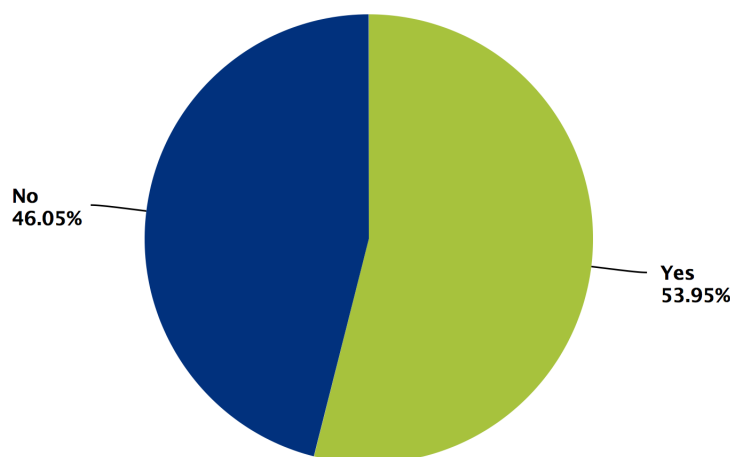
An important feature within any CRM system is the ability to link contacts to accounts and over half (52.9%) have that feature in place. Of those that do not, 21.4% say contacts and accounts live separately, and a quarter claims that it depends, as not all contacts have an associated account.

**Do you link contacts to an account?**

It Depends – not
all contacts have
an account
25.69%

Yes – all contacts
are tied to an
account
52.90%

No – contacts and
accounts live
separately
21.41%

### 2013 REPORT

## A WOW CUSTOMER JOURNEY!
**Actionable Data in Today's Multichannel Contact Center**
*Research Report and Best Practices Guide*

For the most part, agents are satisfied with the CRM, as 49.2% claim somewhat and 14.1% say extremely. 20.7% are either somewhat or extremely dissatisfied.

### How satisfied are your agents with your CRM system?
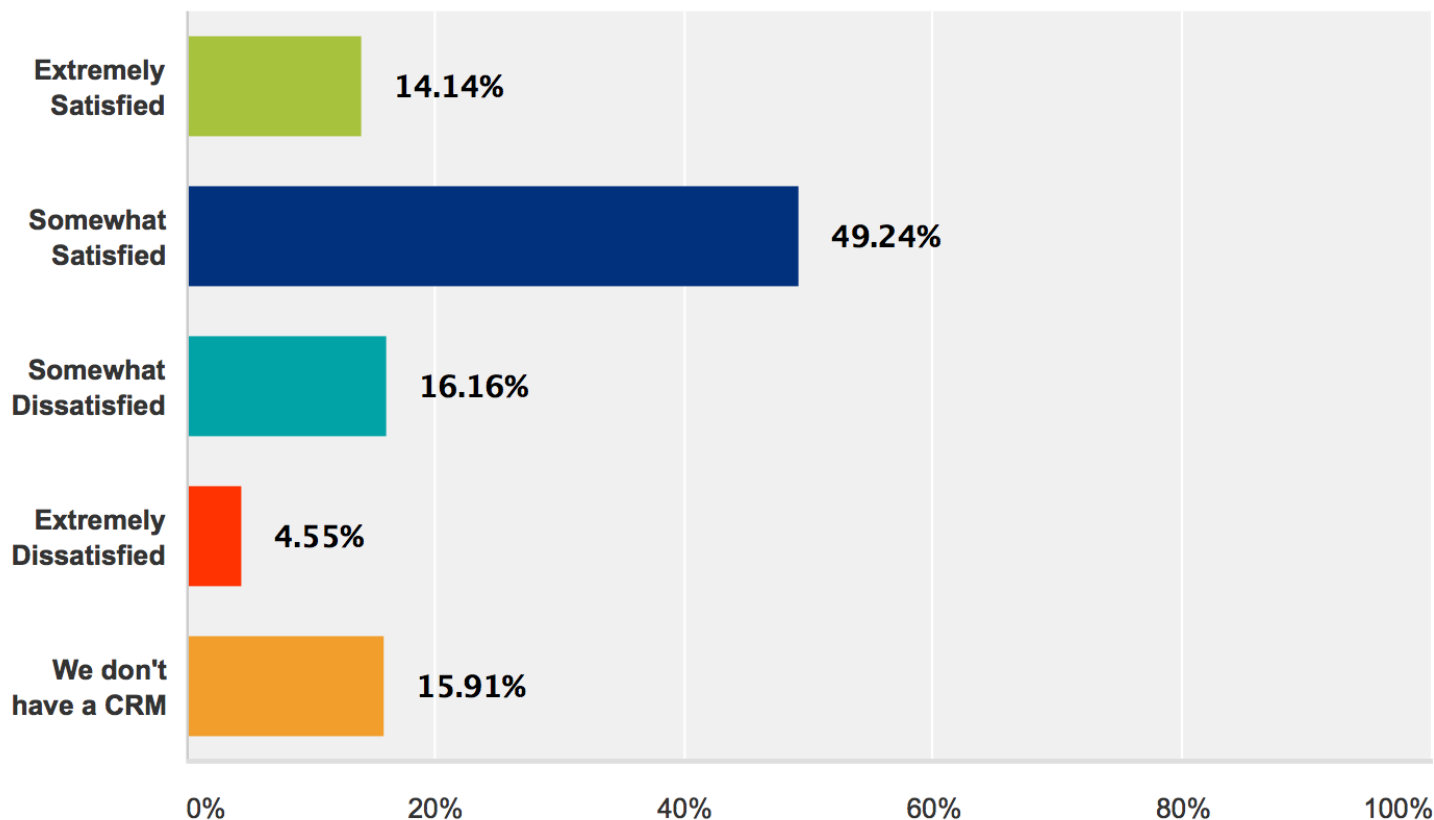


As with any evolving data-driven technology, there are improvements to be made.

**"What would make your agents MORE satisfied with your CRM system?"** we asked.

- Fewer screens to navigate through — 56.1%
- Faster CRM — 41.3%
- A connected unified desktop system consolidating social, mobile, and traditional channel data - 38.0%
- CRM tie-in with other systems like purchasing, the website and phone ACD — 36.2%
- Fewer redundant and duplicate customer records — 26.9%
- More accurate customer information — 25.5%
- Faster customer data refreshes — 14.8%

"Our agents would be happier if it was simpler," said one contact center director. "Less reason codes, more formulaic text or text bites instead of manual entry. The ability to enter individual text, have faster connectivity, and most importantly interaction between all our systems."

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

As we examined earlier, the right technology suite will aid an organization in accomplishing their KPI goals. Traditional metrics are easier to achieve with true channel integration into a CRM platform. Newer metrics such as containment, channel availability, customer-effort-score (CES) and speed-to-resolve, can also be better considered with unified systems.

The ability for supervisors to get real-time analytics DURING a call is incredibly powerful. Mobile technology has made this data even more impactful as supervisors can now manage "remotely" while out on the floor and not at their desks. When asked about this innovative practice earlier in 2013, only 18.7% of survey respondents currently have supervisors managing through mobile devices. For those that do, they are using the devices to truly make data actionable.

**Some of the real-time data and contact center capabilities that can be accessed through a mobile device include:**

- Reports and analytics
- ACD dashboards and real-time queues
- Agent schedules
- ACD supervisor interface
- Call-barging and call monitoring
- Real-time WFM
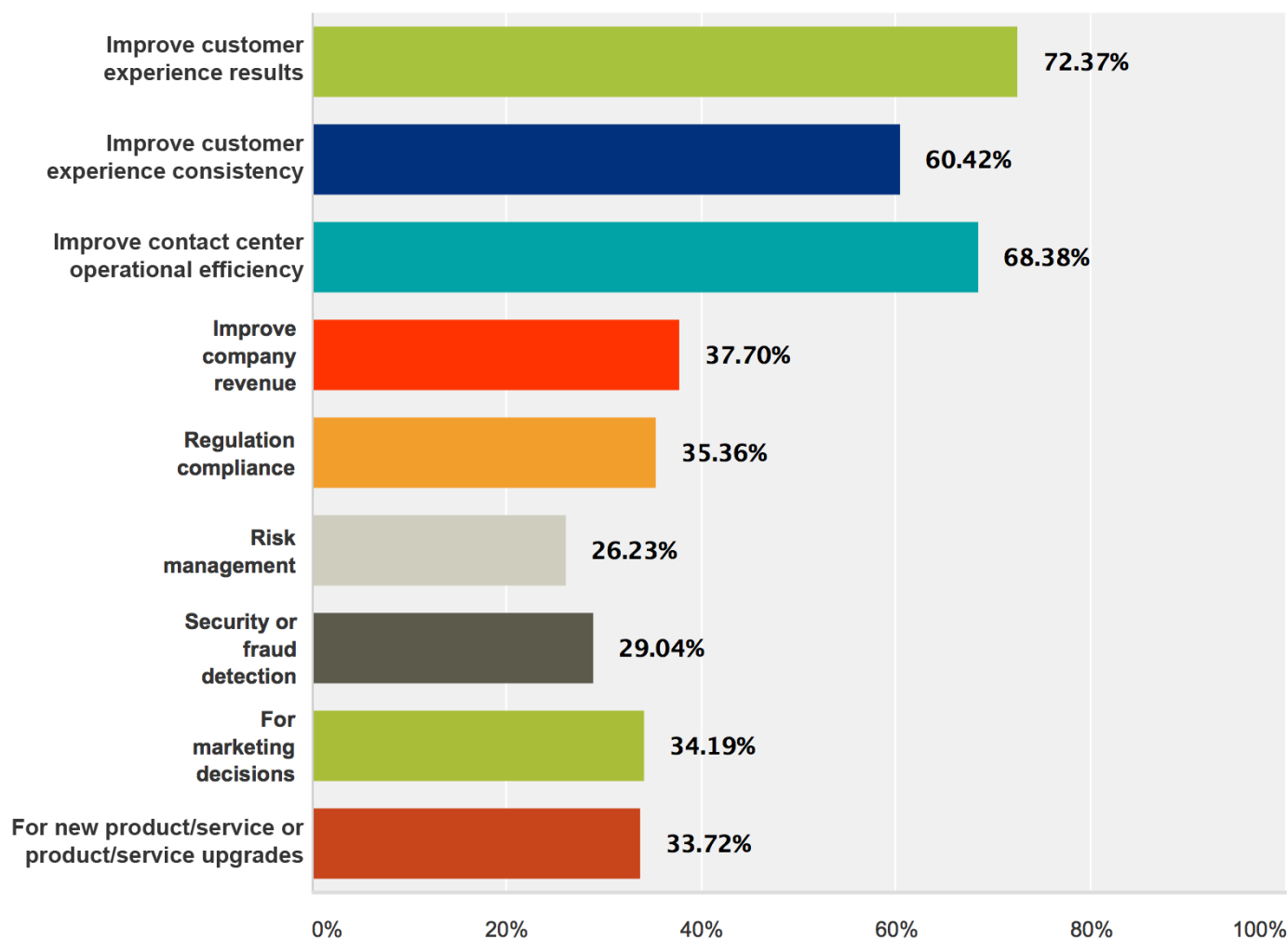- QA forms and scoring

# Transform Data into Opportunity

As we know, it isn't just the contact center that analyzes and needs the data that's collected from customers. Insight from Ventana Research indicates that less than one-third (31%) of organizations produce a single set of reports and analysis that the whole organization can use to support customer-related activities. Even those that do, most lack some critical information such as customer interactions and social media comments.

When asked, "How does your company use data generated by the contact center," 72.4% responded that it's used to improve customer experience results. Another 68.4% said to improve contact center operational efficiency while 60.4% use data to improve customer experience efficiency.

In a lesser capacity, but still significant, over 30% use the contact center data to improve company revenue (37.7%), for regulation compliance (35.4%), to make marketing decisions (34.2%), and to create or upgrade products and services (33.7%). 29% use it for security or fraud detection and 26.2% for risk management.

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Does your COMPANY use data generated by the contact center for any of the following?

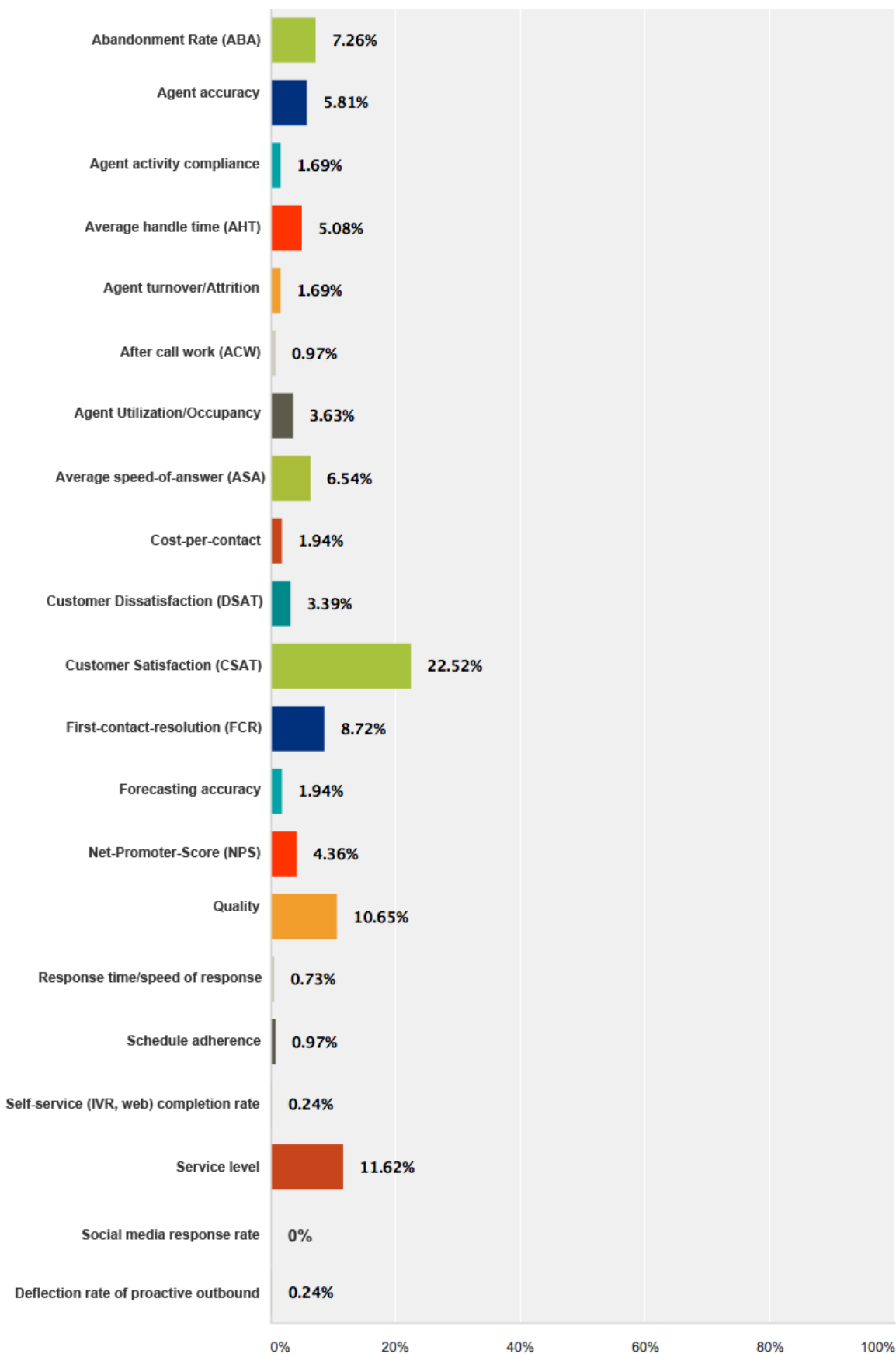| Category | Percentage |
|---|---|
| Improve customer experience results | 72.37% |
| Improve customer experience consistency | 60.42% |
| Improve contact center operational efficiency | 68.38% |
| Improve company revenue | 37.70% |
| Regulation compliance | 35.36% |
| Risk management | 26.23% |
| Security or fraud detection | 29.04% |
| For marketing decisions | 34.19% |
| For new product/service or product/service upgrades | 33.72% |

ICMI also wanted to know which customer experience metrics the company was using to best manage the overall business and which they were utilizing to best compare themselves to competitors.

In both scenarios, the top three indicators of customer experience success were customer satisfaction (CSAT) surveys, net-promoter scores (NPS) and CRM reporting.

In contrast, the contact center reports that while CSAT (30.8%) is also their top customer experience metric for management, they also rely more on quality scores and first –contact-resolution (FCR) than they do NPS and CRM.

**2013 REPORT**

## A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

## Which metric do you consider to be the single most important one for you to collect and report on?

| Metric | Percentage |
|---|---|
| Abandonment Rate (ABA) | 7.26% |
| Agent accuracy | 5.81% |
| Agent activity compliance | 1.69% |
| Average handle time (AHT) | 5.08% |
| Agent turnover/Attrition | 1.69% |
| After call work (ACW) | 0.97% |
| Agent Utilization/Occupancy | 3.63% |
| Average speed-of-answer (ASA) | 6.54% |
| Cost-per-contact | 1.94% |
| Customer Dissatisfaction (DSAT) | 3.39% |
| Customer Satisfaction (CSAT) | 22.52% |
| First-contact-resolution (FCR) | 8.72% |
| Forecasting accuracy | 1.94% |
| Net-Promoter-Score (NPS) | 4.36% |
| Quality | 10.65% |
| Response time/speed of response | 0.73% |
| Schedule adherence | 0.97% |
| Self-service (IVR, web) completion rate | 0.24% |
| Service level | 11.62% |
| Social media response rate | 0% |
| Deflection rate of proactive outbound | 0.24% |

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# The Impact of Actionable Data

So just how much of an effect can accessible, accurate, and relevant data have on an organization? Quite a bit according to our contact center community!

ICMI asked a series of questions associated to three key contact center metrics – average handle time, first contact resolution and customer satisfaction. We aren't claiming that these are the most important data points to collect, measure and report; rather we intend to show that the customer experience in these areas can indeed be improved through actionable data.
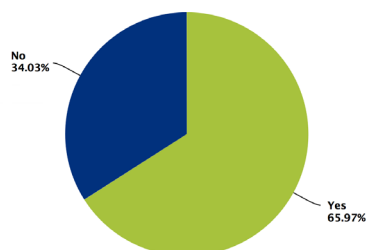
**We asked the following questions:**

- Could AHT/FCR/CSAT be improved if agents had access to better and more accurate customer data?
- How much do you expect AHT/FCR/CSAT could be improved with better/more accurate customer data?
- Could AHT/FCR/CSAT be improved if agents had quicker access to customer data (one location or fewer screens)?
- How much do you expect AHT/FCR/CSAT be improved if agents had quicker access to customer data?
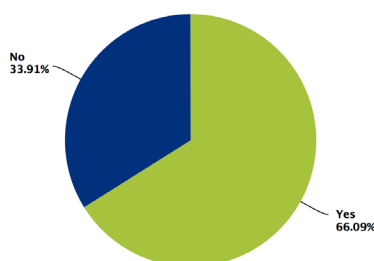
While ICMI does not recommend managing agents through AHT, it is still a needed metric for forecasting, scheduling, and planning purposes. It is also a good indicator of agent comprehension and productivity and efficiency. Ultimately all of those things impact a customer's experience, so AHT remains an imperative metric for management review.

According to 66.0% of our survey respondents, AHT could indeed be reduced with better and more accurate customer data. An equal amount agrees with an improvement to FCR and even more (85.6%) expect gains to CSAT.
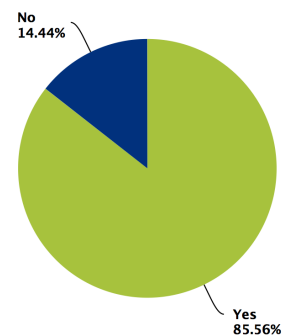
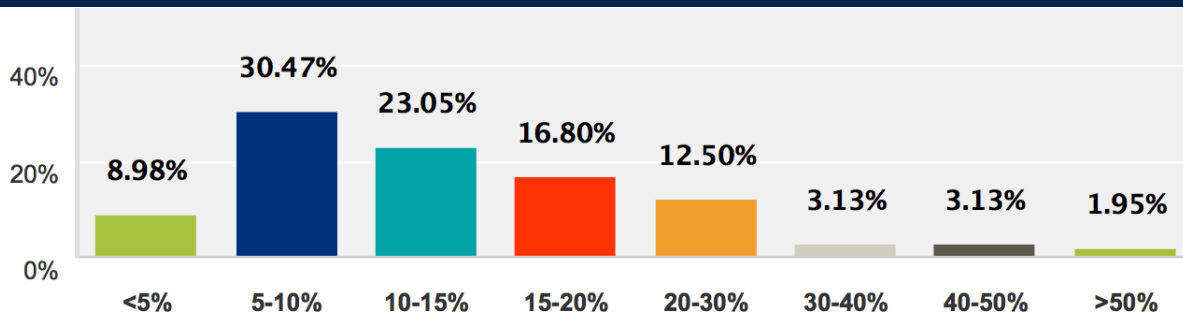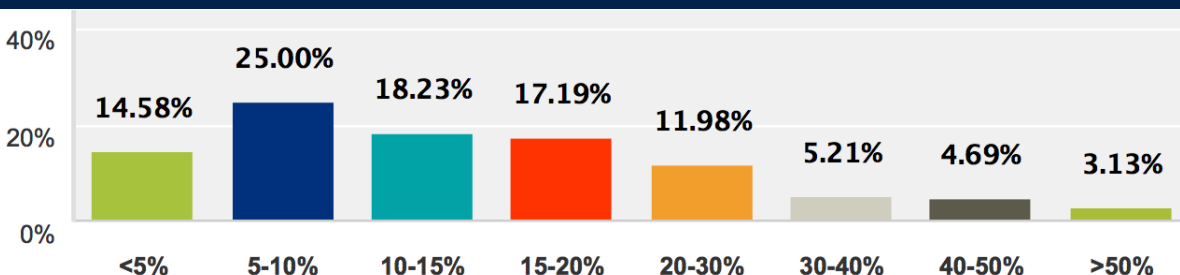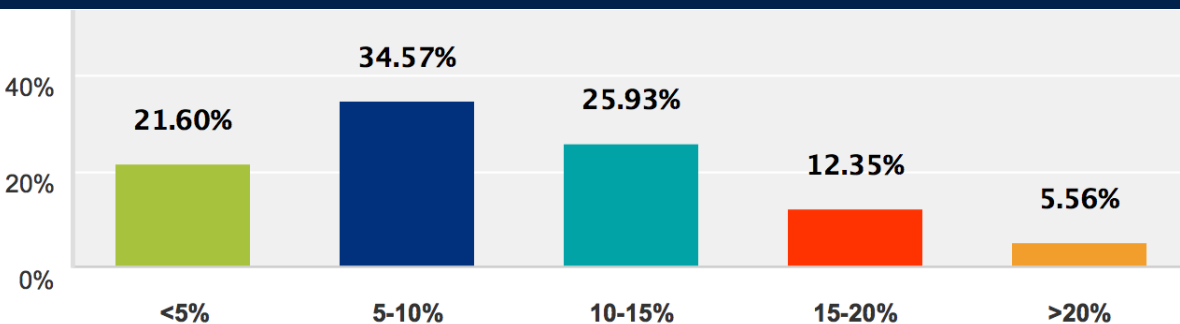| Could **AHT** be reduced if agents had access to better/more accurate customer data? | Could **FCR** be improved if agents had access to better/more accurate customer data? | Could **CSAT** be increased if agents had access to better/more accurate customer data? |
|---|---|---|

No 34.03% / Yes 65.97% — No 33.91% / Yes 66.09% — No 14.44% / Yes 85.56%

While few anticipate improvements of greater than 30% for AHT or FCR, neither do they deem the endeavor fruitless. Only 9% thought the initiative would reduce AHT by less than 5% and only 14.6% thought the same for FCR. An impressive 34.6% thought CSAT would improve by five-to-ten percentage points, with another quarter (25.9%) saying between 10-15%.

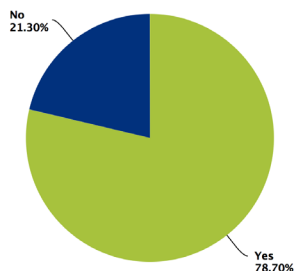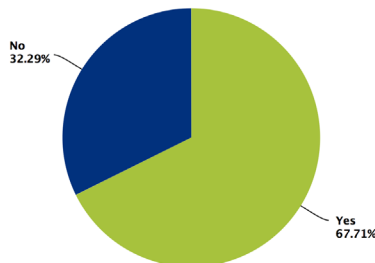**How much do you expect AHT could be reduced with better/more accurate customer data?**

| <5% | 5-10% | 10-15% | 15-20% | 20-30% | 30-40% | 40-50% | >50% |
|---|---|---|---|---|---|---|---|
| 8.98% | 30.47% | 23.05% | 16.80% | 12.50% | 3.13% | 3.13% | 1.95% |

<br>

# A WOW CUSTOMER JOURNEY!
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

**2013 REPORT**

## How much do you expect **FCR** could be improved with better/more accurate customer data?

| <5% | 5-10% | 10-15% | 15-20% | 20-30% | 30-40% | 40-50% | >50% |
|---|---|---|---|---|---|---|---|
| 14.58% | 25.00% | 18.23% | 17.19% | 11.98% | 5.21% | 4.69% | 3.13% |

## How much do you expect **CSAT** could be improved with better/more accurate customer data?

| <5% | 5-10% | 10-15% | 15-20% | >20% |
|---|---|---|---|---|
| 21.60% | 34.57% | 25.93% | 12.35% | 5.56% |

Even more respondents thought quicker access to customer data would produce positive impacts to these key metrics. 67.7% said FCR would improve, 78.7% expected a reduction in AHT, and 87.8% anticipate higher CSAT scores.
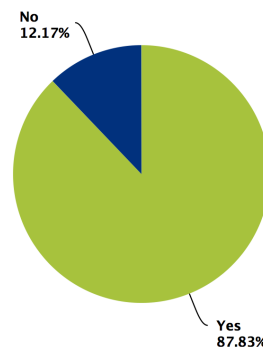
**Could AHT be reduced if agents had QUICKER access to customer data? (One location, fewer screens)**
No 21.30% / Yes 78.70%

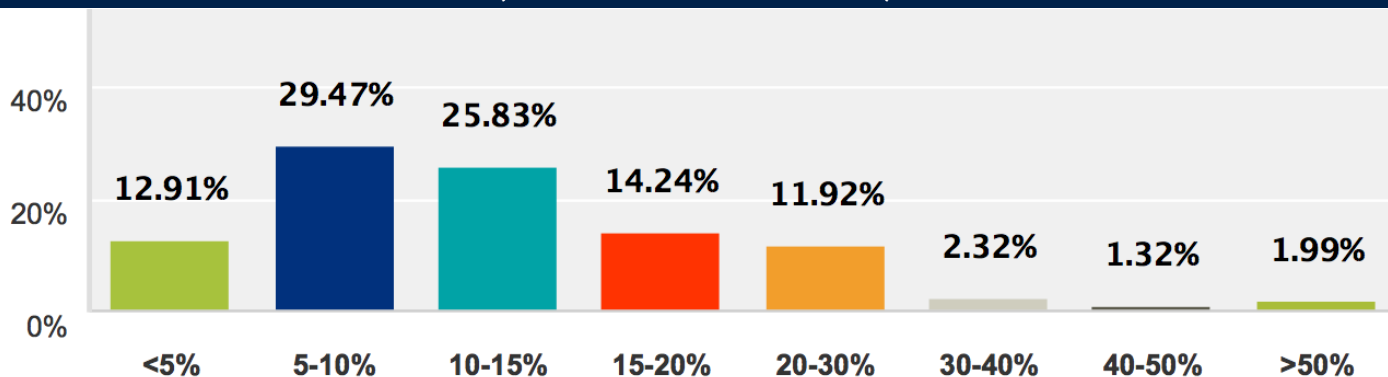**Could FCR be improved if agents had QUICKER access to customer data? (One location, less lag time, fewer screens)**
No 32.29% / Yes 67.71%

**Could CSAT be improved if agents had QUICKER access to customer data? (One location, less lag time, fewer screens)**
No 12.17% / Yes 87.83%

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
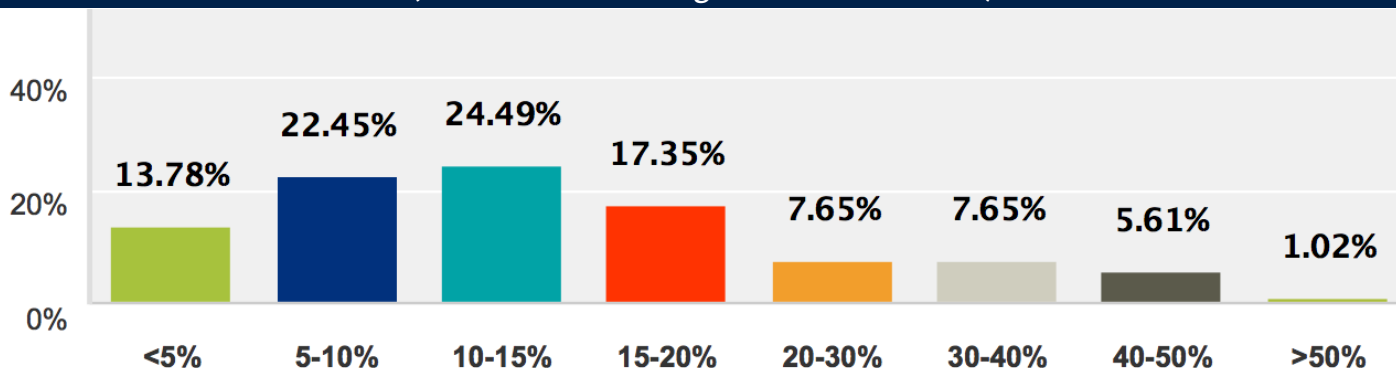*Research Report and Best Practices Guide*

Here again, most thought AHT could be reduced by as much as 30%, while 64.2% felt FCR would be affected by 5-20 percentage points. CSAT on the other hand could potentially improve 5-15% said 58.1%.
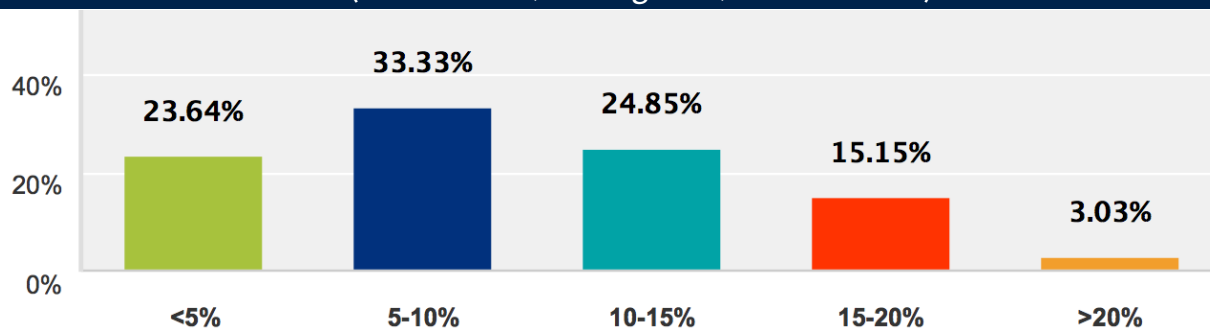
### How much do you expect **AHT** could be reduced if agents had QUICKER access to customer data? (One location, fewer screens)

| <5% | 5-10% | 10-15% | 15-20% | 20-30% | 30-40% | 40-50% | >50% |
|---|---|---|---|---|---|---|---|
| 12.91% | 29.47% | 25.83% | 14.24% | 11.92% | 2.32% | 1.32% | 1.99% |

### How much do you expect **FCR** could be improved if agents had QUICKER access to customer data? (One location, less lag time, fewer screens)

| <5% | 5-10% | 10-15% | 15-20% | 20-30% | 30-40% | 40-50% | >50% |
|---|---|---|---|---|---|---|---|
| 13.78% | 22.45% | 24.49% | 17.35% | 7.65% | 7.65% | 5.61% | 1.02% |

### How much do you expect **CSAT** could be improved if agents had QUICKER access to customer data? (One location, less lag time, fewer screens)

| <5% | 5-10% | 10-15% | 15-20% | >20% |
|---|---|---|---|---|
| 23.64% | 33.33% | 24.85% | 15.15% | 3.03% |

**2013 REPORT**

**A WOW CUSTOMER JOURNEY!**
Actionable Data in Today's Multichannel Contact Center
*Research Report and Best Practices Guide*

# CONCLUSION

## Understanding the Experience; Understanding the Journey

Applying analytics to customer data can deliver significant value when used to deepen customer insight, support better decision-making, improve the agent experience, and provide alerts when situations require attention from managers or executives.

Understanding the customer journey is not a feat attainable by just the contact center. They must partner with all stakeholders in the experience to best understand the influencers along the journey. At each milestone, structured, semi-structured and unstructured data is collected, stored, measured, and reported.

"While it's clear that some contact centers are struggling to utilize customer data, there are areas in which access to customer data in real-time can provide increased efficiencies," said Neely from WhitePages. "With almost two-thirds of respondents saying that data can be used to improve the customer experience, call centers must continue to refine the use of data to further increase the efficiency of their operations."

The key is making that data useable on a day-to-day basis and translating the data into actionable behaviors or process improvements.

As your contact center evolves, you must ask yourself if the measures of performance that have served you well in the last decade are the same ones that will determine how well your contact center is operating today.

Benchmarking and guidance such as this provides contact centers the context they need to better utilize data to the betterment of their customers, their agents and their overall organization. It also provides insight into potential investments, be it tools, technology, processes or resources.

## About This Report

This research was made possible by the underwriting support of Whitepages PRO (www.pro.whitepages.com).
ICMI research sponsors do not have access to research participant information, including individual survey responses

## About ICMI

The International Customer Management Institute (ICMI), is the leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve contact center operations, empower contact center employees and enhance customer loyalty. ICMI's experienced and dedicated team of industry insiders, analysts and consultants are committed to providing uncompromised objectivity and results-oriented vision through the organization's respected lineup of professional services including training and certification, consulting, events and informational resources. Founded in 1985, ICMI continues to serve as one of the most established and respected organizations in the call center industry.

## About Whitepages Pro

WhitePages PRO gives businesses access to WhitePages' contact data, providing a 360 degree view of customers. This intelligence helps to validate online purchasers to identify both fraudulent and legitimate transactions, drive greater efficiency from call centers, and enrich contact records to strengthen customer interactions. Early customers include Vizio, Oakley, and Ann Taylor.