This session provides useful tips for agent coaching, reporting and workforce management processes, including real time, that help define supervisor and agent roles, encourage ownership, prioritize the right things and improve performance.

Perspective: Agent Rights
Objectives: Setting targets.
- How do we know if we’re doing well?
- How to set the right targets for service level or handle time

Supporting Processes: Enabling good performance with strong processes, e.g.:
- Work forecasting and staff planning
- Reporting that supports decision making
- Agent coaching
- Real time exception handling

Actions – Roles & Responsibilities
- What is your job? Supervisor and agent accountability.
- What roles can technology play to help improve performance?
3 RIGHTS OF THE WORKER

In my job, I have the right…

1…to know what is expected of me.

2…to know how I’m doing toward that expectation.

3…to get assistance in meeting performance expectations.
OBJECTIVES

What will we be looking for?
What does success look like?

SMART objectives

Specific
Measurable
Achievable
Relevant
Time-Specific
OBJECTIVES

Now that we know what to measure, what are we trying to achieve for each metric?

Need to determine what are reasonable (achievable but challenging) targets.

- How many True Calls per Hour should agents be able to achieve, given all the activities required of the job? 5, 6, 10?
- Avg Handle Time (AHT): is it possible to be appropriately thorough for a Type A call in 2.5 minutes?
- Quality Score: What is a reasonable target for overall quality scores? 8?
- Should Availability be 100% or 90%? What are the dependent factors?
OBJECTIVES

• Consider what is currently being achieved, on average, by the team, best reps and lowest performers.
• Choose objectives that are achievable but challenging.
• Modify objectives as they are achieved (and celebrate!) to ensure continual improvement.
• Define what qualifies as “job mastery” or optimal performance for an agent.
COMPLEXITIES OF THE MODERN CONTACT CENTER

Agent stats are affected by

• Multi-skilled, but not equally skilled agents
• Shared agents and overflow scenarios
• Countless shift times and lengths
• Offline work and special projects

Team stats are affected by

• Availability of alternatives, like web, email, chat
• Variable caller wait tolerance
• Complexity of call flows and menus
COMPLEXITIES OF THE MODERN CONTACT CENTER

How often, in a coaching session, does an agent say:

“You can’t compare me with them, because...”
<insert reason of the month>
MORE THAN A NUMBER

Variance  Percentage  Average  Trend

These are all modifications to the raw data that apply some context and can bring the picture into better focus.

Which is more meaningful:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Raw number</th>
<th>With context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Handle Time</td>
<td>00:03:45 per call</td>
<td>Variance: 8% below target</td>
</tr>
<tr>
<td>Not Ready</td>
<td>02:04:50 per day</td>
<td>Percentage: 26% of login time</td>
</tr>
<tr>
<td>Calls handled</td>
<td>125 per day</td>
<td>Average: 25 per busy hour</td>
</tr>
<tr>
<td>Abandon rate</td>
<td>4.2% for the day</td>
<td>Trend: down 1.2% month-to-date</td>
</tr>
</tbody>
</table>
Example AHT

- Create personalized AHT objectives by calculating target and actual proportionally by call type handled
- Then compare agents on variance from the adjusted target
Complete with your call center teams.

<table>
<thead>
<tr>
<th>Call Type</th>
<th>Metric</th>
<th>Team A</th>
<th>Team B</th>
<th>Team C</th>
<th>Team D</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Service Level</td>
<td>80% in 20 sec</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All</td>
<td>% Forecast Accuracy (Forecast-CallsOffered)</td>
<td>(+/- 10%)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>All</td>
<td>Quality (Average score for agents)</td>
<td>8/10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td>Average Handle Time</td>
<td>04:10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Service</td>
<td>Average Handle Time</td>
<td>03:40</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Support</td>
<td>Average Handle Time</td>
<td>06:30</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>General</td>
<td>Average Handle Time</td>
<td>4:25</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How would objectives differ among teams, or between agents?

Do some reps need interim goals that are more realistic for them?

<table>
<thead>
<tr>
<th>Metric</th>
<th>Team/Agent A</th>
<th>Team/Agent B</th>
<th>Team/Agent C</th>
<th>Team/Agent D</th>
</tr>
</thead>
<tbody>
<tr>
<td>True Calls per Hour</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Availability</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Average Handle Time</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
How can we stay on track in our day-to-day operations?
What should we be doing to support the mission and vision and ensure continual improvement?

**Workforce Management**
Getting the right people in the right places at the right times.

**Quality Monitoring**
Delivering consistent service that meets established criteria for quality.

**Reporting**
Giving visibility to the results of planning and performance efforts, to assess and modify.

**Coaching**
Communicating expectations, progress and support options, collaborating on action plans.

**Training**
Modules and tools that address key behaviours, skills and knowledge that drive performance.
PLAN THE WORK

Managers need to know:

• How many contacts need handling? What is the workload?
• How many reps are needed to handle them?
  • What skills are required to handle each type of call?
  • How many contacts can one rep handle – types and volume?
  • How long does it typically take to handle each type of contact?
  • What are the goals for service speed?
• What are the scheduling options and limitations?
• What is the definition of a quality call?
  • What are the procedures for scoring a call and coaching on quality?
• How to help reps reach their potential and meet individual objectives.
WORKFORCE MANAGEMENT

1. Forecast call volumes based on historical trends and known, anticipated exceptions.

2. E.g. trend last 8 weeks of Monday 09:00-09:15 intervals.

3. Run Erlang C calculations to determine minimum staffing required, considering SL targets and actual handle times, by skill or call type.

4. Adjust for a shrinkage factor to calculate rostered staff.

5. Schedule agents for each skill and 15-min interval of the day, ensuring that breaks are covered.

6. Manage in real-time as absentees call in or volumes or handle times track off-forecast.

7. Identify a back-up group of agents or supervisors who can back-fill for any intervals where you have shortages. If you have extra staff for a period of the day, assign training or allow coaching sessions.
QUALITY MONITORING

1. Have a quality call document distributed for reference of both listeners and agents who are being reviewed.

2. Decide who will conduct the listening and how.

3. **Who:** managers, supervisors, coaches, trainers, peer agents

4. **How:** call recording and scoring software, live-observe and manual scoring sheet

5. Calibrate listeners regularly to ensure they are listening for the same thing and judgments remain objective or holistic.

6. Use even-number scoring keys to avoid neutral middle-scoring. E.g. Poor Fair Good Excellent

7. Use weighted scoring for various components of a quality call.
MEASURING QUALITY

<table>
<thead>
<tr>
<th>Scorecard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Score</td>
</tr>
<tr>
<td>O</td>
</tr>
<tr>
<td>☐</td>
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<tr>
<td>☐</td>
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<td>☐</td>
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<tr>
<td>☒</td>
</tr>
<tr>
<td>Poor</td>
</tr>
<tr>
<td>Fair</td>
</tr>
<tr>
<td>yes</td>
</tr>
<tr>
<td>n/a</td>
</tr>
</tbody>
</table>

**Comments:**

These comments can be subjective, since the caller’s assessment of the call will also be subjective. The comments allow the certified quality listener to give an overall “feel” of the call. Comments should focus on what the agent DID or DIDN’T do, directly related to contents of an established quality call document or guide, or what the customer did or said, and avoid using “should have” language.

Overall Score for call

Total: __ / 10

Quality Score for agents is an average of all the call results for the period.

When coaching, identify where the agent may be losing points, and note any trends that come up in the comments. Talk about these things in the coaching session.
REPORTING

Who needs reports?
What decisions are they making with the reports?
What do they need to see? In what format? How frequently?
What will they do with the results?

Where will the numbers come from?
How will the reports be generated and distributed?
Will current tools and technologies accommodate reporting needs?
Are any custom calculations or formats required?
Do the results require explanation to help the reader interpret?
SAMPLE REPORT SET FOR AGENT COACHING

True calls per hour bar chart
Average login hours bar chart
Handle time bar chart
Quality average scores and comments
Productivity/Quality trend chart
Login hours trend chart

On Agent reports, show:

Goal
Team Average & Individual Performance
PRODUCTIVITY/QUALITY

Agent P/Q Summary 2014

Productivity

Quality
REPORT DESIGN PLANNING

• Design sets of reports for each distinct information customer group. Not too much, not too little.

• Executives don’t need to see how much Not Ready time there was, but should see KPIs like Service Level and Quality scores.

• Agents need to see just enough to identify what they need to improve and the root cause.

• Notate data to provide context for executives and explain any anomalies.
## WHO GETS WHAT

<table>
<thead>
<tr>
<th>KPI</th>
<th>Who needs it?</th>
<th>What for?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Level</td>
<td>Everyone</td>
<td>Determine if action is required. Real time for immediate action, scheduling improvements, agent coaching, process improvements</td>
</tr>
<tr>
<td>Avg Handle Time</td>
<td>WFM, supervisors/managers, agents</td>
<td>Staffing calculations Coaching Self-assessment</td>
</tr>
<tr>
<td>True Calls</td>
<td>Supervisors/Managers, Agents</td>
<td>Coaching Self-assessment</td>
</tr>
<tr>
<td>Quality</td>
<td>Everyone</td>
<td>Determine areas for improvement or clarity of quality document</td>
</tr>
<tr>
<td>% Availability</td>
<td>WFM, supervisors/managers, agents</td>
<td>Assess effectiveness coaching Self-improvement</td>
</tr>
</tbody>
</table>
Define a comfortable Coaching Cycle

- Set a performance period that gives enough time to
  - schedule each agent one session each rotation,
  - listen to and score a reasonable number of calls,
  - collect and analyze productivity data and trends,
  - produce report sets for the period, and
  - (for agents to) complete the training, implement action plans and show progress prior to the next coaching session.

Every two-three weeks? Once a month?
COACHING TIPS

1. Schedule regular one-on-one meetings with each agent to discuss their progress toward expectations. Take a position of support and helping and be prepared to act.

2. Prepare a report package for each session
   a. begins with a high level chart of performance: productivity and quality.
   b. If KPIs show need for improvement, refer to drill-down reports with agent KPIs, supporting metrics and quality breakdown.

3. Only “Coach” on trends in performance or behaviour, not one-time incidents.

4. Stick to factual language (“did/did not” rather than “you should have”) and stick to documented expectations from the quality call document or a previous improvement plan.

5. Consider individualized interim objectives based on actual distribution of call types. E.g. Handle time may be higher for a higher skilled agent who takes more challenging calls.

6. Celebrate victories and sign action plans for any improvements needed.
   a. Improvement plans may include additional coaching sessions, targeted training modules, mentoring or self-learning
   b. Provide time in the schedule for the agent to complete the lessons and practice before the next coaching session.
   c. Develop a reward/recognition plan along with agents to ensure that the solutions motivate.
HOW TO DEMOTIVATE

According to research involving call center agents, here are five items that de-motivate your agents according to agents:

- Poor leadership skills of supervisors
- Inadequate tools and equipment
- Poor work environment
- Inadequate or no benefits
- Irrelevant incentives

Motivation is not a gimmick, a contest or a T-shirt.
ACTION PLAN

A contract to improve performance between agent and coach.
Involves commitments from both parties, and a target date for completion.
Signed by agent and coach.

Name:_________________ Session Date:____________________

I agree to take the following actions within the stated period of time to improve the results indicated.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Action</th>
<th>Implement by date</th>
<th>Support needed</th>
<th>Coach signature</th>
<th>Agent signature</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
COACHING OPPORTUNITY

Example:

Skill gap:
Talk-and-type skill

Visibility:
low true calls per hour caused by high not ready/aux time, or high talk time

Action/Responsibilities:
Manager or Coach will suggest available training modules during coaching, the WFM manager will make time available in the Agent’s schedule to accommodate the training, or the Shift Leader/Supervisor will allow training during slow times, and the Senior Management and Training Teams will ensure that appropriate training modules remain available to develop the talk-and-type skill.
I agree to take the following actions within the stated period of time to improve the results indicated.

<table>
<thead>
<tr>
<th>Issue</th>
<th>Action</th>
<th>Complete by date</th>
<th>Support needed</th>
<th>Coach signature</th>
<th>Agent signature</th>
</tr>
</thead>
<tbody>
<tr>
<td>high AHT</td>
<td>take “Talk&amp;Type” training module</td>
<td>July 15, 2014</td>
<td>time scheduled during shift</td>
<td>GC</td>
<td>JP</td>
</tr>
</tbody>
</table>
ALL TOGETHER
EXAMPLE OF USING PERFORMANCE REPORT SET

1. Management Report

Check KPIs
a. If all objectives are met, stop there and go on to your next task. If met consistency, adjust objectives up.
b. If not, look at which group or team is not meeting KPI objectives, and which KPIs are not being met.

2. Team Report - KPIs by Group

Check KPIs
a. If all met, look at next team.
b. If not, look at supporting metrics
   1. If Average Handle Time is high, look at Agent Stats
   2. If SL is off, look at stats like staffing accuracy, adherence, availability

3. Agent Performance

Check KPIs
a. Look at True calls/Hour and % Availability
b. If not met, look at supporting metrics
   1. High handle time:
      a. Talk, NR or DN time high? Coach or train
   2. Low Availability? Coach or train.
      a. High non-phone time?
      b. Short shifts/login?
TRAINING

- Identify and document set of Knowledge and Skill areas.
- Involve trainers in the performance management program development.
- Have modules prepared that address the key skill and knowledge areas identified in the quality call documentation, and tools for agents to improve performance on KPIs.
  - Give alternatives to accommodate different learning styles: mentoring, self-directed, in-class or online
- Assign time in schedule for agents to take training needed to achieve their action plan commitments.
ROLES & RESPONSIBILITIES

Who is involved in the planning, development and ongoing success of the performance management program?

What are the expectations?

Who does what?
ROLES & RESPONSIBILITIES

**Agents**  Handle customer inquiries following established protocols and company policies, upholding standards of quality and efficiency to serve both customer and business needs. Give feedback on what is working and what is interfering with the proper handling of calls.

**Supervisors**  Support agents by clearly communicating expectations, providing timely and accurate feedback, removing obstacles to performance and providing opportunities to develop skills.

**Managers**  Support Supervisors and Agents by providing clear direction and goals, communicating regularly and assisting to remove obstacles and provide opportunities to improve.

**Executives**  Champion the program throughout the organization, providing strategic guidance, approvals and budget support where appropriate.
**Agents**
- Make final push for the summit, striving for specific objectives to work the plan.

**Supervisors**
- Further focus on implementing the plans, make adjustments, remove roadblocks, support agents to reach goals.

**Team Managers/WFM**
- Narrow the focus to operational goals and processes, remove roadblocks, support next levels.

**Senior Management Team**
- Provide grounding, foundation, guiding direction and support to all levels.

**Flow of Information:**
- Results, exceptions, observations, concerns and successes, flow back through all the levels and feed into the next planning cycle.
- Appropriate actions are taken at each level to ensure continuous improvement.
## WHAT DO THE KPIs MEAN TO ME?

<table>
<thead>
<tr>
<th>Whose Perspective?</th>
<th>What are they concerned about?</th>
<th>Key Performance Indicator or Secondary</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Agent</strong></td>
<td>1. Am I providing quality service according to our team's documented quality definitions?</td>
<td>1. Quality scores</td>
</tr>
<tr>
<td></td>
<td>2. % of my shift I am expected to be logged on and available for or performing work.</td>
<td>2. %Availability</td>
</tr>
<tr>
<td></td>
<td>3. Length of time I spend on each call.</td>
<td>3. KPI: True Calls/Hour</td>
</tr>
<tr>
<td></td>
<td>4. Am I following procedures for classifying work?</td>
<td>2nd: Average Handle Time</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Use of Activity/NR Codes</td>
</tr>
<tr>
<td><strong>Supervisor/Shift Leader</strong></td>
<td>1. % of time agents are logged in and available for or performing work.</td>
<td>1. %Availability</td>
</tr>
<tr>
<td></td>
<td>2. Real-time: do we have enough staff on to answer the call volumes?</td>
<td>2. %Service Level</td>
</tr>
<tr>
<td></td>
<td>3. Overall productivity or use of resources (too high risks turnover, too low is inefficient)</td>
<td>%Forecast Accuracy</td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>1. Set team goals and assist staff in setting personal goals</td>
<td>3. Schedule Adherence (future)</td>
</tr>
<tr>
<td></td>
<td>2. What proportion of staff time is spent on non-productive activities? What are the impacts on productivity &amp; staffing?</td>
<td>%Occupancy</td>
</tr>
<tr>
<td></td>
<td>3. Why are people calling? Do we have the right skills?</td>
<td></td>
</tr>
<tr>
<td><strong>Senior Management Team</strong></td>
<td>1. Set dept. goals and assist staff in setting personal goals</td>
<td>Quality Cost Productivity</td>
</tr>
<tr>
<td></td>
<td>2. Meeting overall operational requirements based on organizational mission and goals.</td>
<td></td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>1. Continuous</td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Not Ready %</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Activity Code %</td>
<td></td>
</tr>
</tbody>
</table>
As an AGENT, what am I responsible for?

“Doing my personal best.”

- Provide quality to the caller you have, while being mindful of the next person waiting
- Follow agreed procedures for use of phoneset
  - Activity Codes
  - Not Ready Reason Codes
  - Strive to classify every event – avoid defaults
  - No “bumped” calls
- Be logged in and available to work when scheduled
  - Minutes count
  - Power of One – be accountable to the team
- Communicate concerns immediately to those who are there to help (Supervisors/Managers)
- Set personal goals to enhance own quality and performance
- Achieve or exceed objectives
WORK THE PLAN – SUPERVISORS

What am I responsible for?

“Assisting agents to meet their individual potential.”

- Provide help tools to promote enhanced quality and productivity.
- Monitor staff real time productivity
- Remove roadblock to productivity
  - Coach
  - Adherence to scheduling
- Achieve or exceed objectives
WORK THE PLAN – WFM

What am I responsible for?

“Forecast workload, staff and schedule as accurately as possible.”

- Workforce Management (WFM)
  - Provide accurate forecasts
    - Use historical trending, expected exceptions and adjustments
    - Measure offered as a percentage of forecasted
  - Determine staff requirements for each unique call types
    - Use call center calculators (e.g. Erlang C) with accurate inputs:
      - Service level objectives
      - Average handle time (actual or target, whichever is greater)
      - Forecasted call volume
  - Endorse Real Time Management procedures
    - Intraday, equip shift supervisors to deal with exceptions
    - Promote an “alert system” triggered by unexpected call traffic or staff shrinkage
    - Provide feedback mechanism to report exceptions
  - Achieve or exceed objectives
WORK THE PLAN – MANAGERS

What am I responsible for?

“Assisting call takers to meet their individual potential.”

• Communicate expectations, performance, help tools
  • Promote quality call definitions and productivity/quality metrics
• Monitor performance and work to improve
  • In real-time and historically, productivity and quality
• Remove roadblocks to productivity
  • Provide training opportunities
  • Handle questions/concerns
• Coach
  • Represent metrics, measures and objectives
  • Provide objective feedback and obtain commitment on action items
• Endorse established processes and direction
  • Better understanding of forecasting process and making the business decisions to meet goals
• Lead by example – exemplify the behaviour you wish to encourage in others
• Achieve or exceed objectives
WORK THE PLAN – SENIOR MANAGEMENT TEAM

What am I responsible for?

“Construct and maintain an environment that allows the team to succeed.”

• Provide clear direction on expectations and goals
• Provide sufficient resources to do proper Workforce Management (WFM)
• Support Team Managers/Supervisors
  • Provide consistent messages of direction
  • Remove roadblocks to success
• Quality
  • Provide and promote quality call definition: rules and guidelines for achieving and assessing quality
• Monitor costs
• Achieve or exceed objectives
DECISION SCENARIO

Why are we not achieving Service Level objectives?

What influences Service Level?

- Forecast Accuracy
- Staffing & Schedule Accuracy
- Agent Adherence
- Real Time Mgmt
- Actual Handle Time

Service Level
SAMPLE DECISION PROCESS

Service Level not met

Why?

Was the forecast accurate?

Yes

No

Actual = scheduled staff?

Yes

RT: Staff logged on but unavailable?

Yes

Real Time: Initiate "All hands on deck" protocols

No

Hist: AHT longer than planned?

Yes

Historical: Report exception, feed back to WFM to adjust staffing

Hist: AHT longer than planned?

No

Historical: Report exception, feed back to WFM to adjust staffing

Hist: AHT longer than planned?

Yes

Historical: Report exception, feed back to WFM to adjust staffing

If trend, check agent reports for coaching opportunities to reduce AHT
SAMPLE DECISION PROCESS FOR SUPERVISORS/MANAGERS

Service Level is not meeting target. Why?

• Was the forecast accurate?
  • Yes: Is staffing per schedule sufficient?
    • Yes: Are agents logged in but unavailable?
      • Yes: Initiate alert system for “all hands on deck”
    • No: Is average handle time for this period longer than AHT used in staffing calculations?
      • Yes: Initiate alert system for “all hands on deck” for real time management
      • Historical: Note exception for management reports, feedback to WFM to adjust planning, look for coaching opportunities to reduce AHT
DAILY WORK SCENARIO: MANAGERS

- Listen to and score $n$ calls, according to universally acknowledged quality call definitions and QM practices
- Spend time coaching
- Work with individual and team to set goals and provide opportunities to achieve these goals.
- Providing feedback and reporting on operational results to improve performance and productivity
Performance Management is not an event. It’s a process. Goals are set, achieved and changed. Processes are created, enhanced or abandoned. Technologies are adopted, adapted or eliminated.

The one constant is the strategic direction and mission. Everything else is done in support of that quest.

A great IDEA to keep in mind:

- Identify issues and areas of opportunity
- Develop and assess potential solutions and implement best alternative.
- Evaluate the results against the initial goals.
- Act to adopt, adjust or abandon.
KEYS TO SUCCESS

Proper launch
  - Show enthusiasm!
  - Emphasize benefits to all
  - Continual communication

Include all stakeholders
  - All-hands ownership & accountability
  - Secure executive sponsorship
  - Cultivate a culture of support
  - Commit to continual improvement

Keep communicating
  - Open door policy for two-way communications
  - Ask questions, take input, make good decisions together, communicate expectations, results, options and actions
  - Celebrate successes
DAILY WORK SCENARIO:
SUPERVISORS – REAL TIME SL MANAGEMENT

Each day

• Check staffing - schedule vs. actual - at beginning of each shift (eg: break adherence)
• Adjust plans for over/under staffing for each interval
  • Understaffed: initiate alert system level one
    • E.g. borrow staff from other groups or have supervisors sign on (e.g. initiate tier one/tier two)
  • Overstaffed: allow training, coaching, special project work for times that are overstaffed
• Check call volume - forecast vs. actual - throughout the day
  • Adjust for high/low trending, as above, for each interval
HOW CAN TECHNOLOGY HELP?

Automate parts of the process

• WFM, QM, Reporting, Training
• Auto-post reports to an intranet site or set up automatic email notifications for delivery

Reporting Capabilities

• Most systems – ACD, WFM, QM – have their own reporting modules.
• Custom solutions can combine data from multiple sources and perform custom calculations from raw data.

Office Tools

• Excel can help with forecasting/scheduling
• Combine/manipulate data from different reports, add constants like targets and translating raw numbers to percentages or variance.

ACD

• Real-time displays allow real-time management and can help identify SL problems and staff adherence to schedules.
• Some systems have ability to dynamically activate “back up” systems or redirect calls and provide remote notification of issues in the center.
• Notification of availability of reports when generated.
CORE COMPONENTS

Performance Management

- Strategy
- Metrics
- Measures
- Objectives
- Supporting Processes
- Roles & Responsibilities
STRATEGIC ➔ TACTICAL

Strategic Goals

- Improved Affordability and Sustainability
  - Cost Management
- Improved Customer Experience
  - Continuous Improvement
  - Quality Assurance
- Improved Business Outcomes
  - Efficient Service Delivery
  - Training and Development
  - Workforce Management
- Optimized use of Human Resources

Supporting Operational Processes

- Key Indicators (Team & Mgmt)
  - Quality
  - Abandoned %
  - Service Level
  - Cost per Call
  - Forecast & Staffing Accuracy
  - Average Speed of Answer
- Key Indicators (Individual)
  - Schedule Adherence
  - % Login
  - True Calls per Hour
  - Quality Scores
  - % Availability
  - Average Handle Time

Performance Metrics

Reports

- Management Reports
- Operational Key Performance Indicators per Line of Business
- Agent Performance & Login/Logout Reports
- Call Log Detail Reports
THANK YOU!

Symmetrics Contact Center Performance Management

Sources: mindtools.com  prosci.com  Centerserve: call-center.net  harrisonwebster  Advanced Performance Management Program  Management By Objectives principles