

Operations Summit 2012



Contact Center Math: Managing by the Numbers

Presented by:



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Session Overview

In today's session, you will learn to:

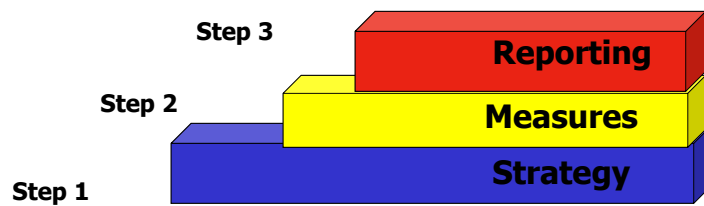
- Establish a balanced set of performance objectives that align with company business goals.
- Identify objectives and critical measures for each stakeholder group.
- Define the most common performance measures for key roles related to service, efficiency, and profitability.
- Review some of the math steps associated with call center KPIs.
- Outline some of the approaches for reporting and sharing KPIs with others.

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Definition

Performance Measurement System

A powerful methodology which allows you to plan, monitor, and manage your business



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Performance Measurement System

Step 1



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Strategy and Objectives

- Align call center goals with overall business objectives.
- Analyze how the center's performance impacts the company and its customers.
- Develop center objectives that maximize contribution to the company's overall objectives.
- Hold yourself accountable to the objectives!



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Developing a Strategy

Words of Wisdom

**Just because you CAN measure it,
it doesn't mean you SHOULD.**

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Ways to Demonstrate Value



Measure things to help you:

- Contribute to the goals of the enterprise.
- Build internal partnerships.
- Provide feedback to departments who need it.
- Be proactive and initiate action.
- Shape performance of individuals and team.

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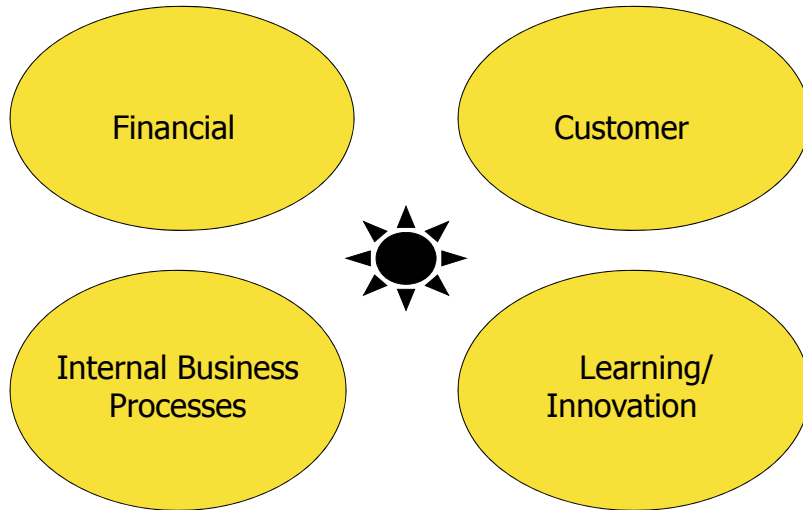
Balanced Scorecard Approach



- Helps align key performance measures with strategy at all levels of an organization
- Provides management with a comprehensive picture of business operations
- Facilitates communication and understanding of business goals at all organizational levels
- Provides strategic feedback and learning

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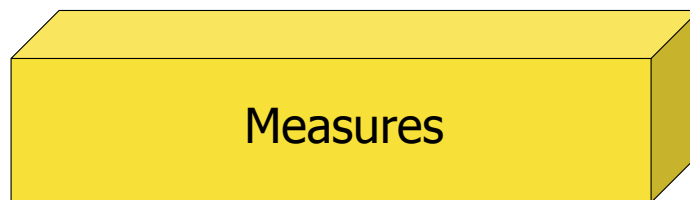
Balanced Scorecard Rationale – Strategy



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Performance Measurement System

Step 2



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What Should You Measure?

Key Concept:

Focus on Primary Stakeholder Perspectives



Who are the main groups of people you need to keep happy each day?

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Stakeholder Perspectives

Who are the main "stakeholders"?



- 1.
- 2.
- 3.

What does each care about?

What do you need to measure?

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Who Cares About What?



- **Customers**
 - Service
 - Quality
- **Management**
 - Efficiency
 - Profitability
- **Frontline Staff**
 - Workload
 - Work environment

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Performance Measures

Service/Quality

- Speed of answer (How fast?)
- Availability (Are we there?)
- Quality (How well?)



Efficiency

- Staff utilization (Do we match workforce to workload?)
- Contact handling (How long does it take?)
- Other resource utilization (How is self-service working?)

Profitability

- Conversion and/or up-sell rate (Are we selling?)
- Cost per call (What are costs and margins?)

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Service Measures



Speed of Answer

- Service level (x % in y sec)
- Average speed of answer (ASA)
- Service consistency
- Longest delay in queue (LDQ)

Availability/Connection

- Abandon rate
- Line blockage/busy signals
- Self-service options

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Speed of Answer



Which speed of answer measure is used for your call center?

- Service level
- ASA
- Other

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Actual View of Service Level and ASA

Arrival Number	Time of Arrival	Handle Time	Time Call Began	Time Call Ended	Delay of Call
1	8:02.2	2.4	8:02.2 a	8:04.6	0
2	8:02.4	2.6	8:02.4 b	8:05.0	0
3	8:03.6	2.0	8:04.6 a	8:06.6	1.0
4	8:04.3	3.2	8:05.0 b	8:08.2	0.7
5	8:06.6	2.4	8:06.6 a	8:09.0	0
6	8:06.8	2.4	8:08.2 b	8:10.6	1.4
7	8:07.2	3.0	8:09.0 a	8:12.0	1.8
8	8:10.1	1.2	8:10.6 b	8:11.8	0.5
9	8:12.2	2.8	8:12.2 b	8:15.0	0
10	8:17.2	2.6	8:17.2 a	8:19.8	0
11	8:18.8	2.4	8:18.8 b	8:21.2	0
12	8:21.0	6.0	8:21.2 a	8:27.2	0
13	8:24.0	4.2	8:24.0 b	8:28.2	0
14	8:26.2	2.4	8:27.2 a	8:29.6	1.0
15	8:28.0	2.4	8:28.2 b	8:30.6	0.2

Service Levels:

9 of 15 (60%)
in ≤ 20 sec

10 of 15 (67%)
in ≤ 30 sec

13 of 15 (87%)
in ≤ 60 sec

ASA = .44 min or 26 sec

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Understanding Delay Numbers

Number of Staff	Queued Portion	Delay of Delayed Calls	Avg. Delay of All Calls (ASA)
21	76%	150 sec	114 sec
22	56%	75 sec	42 sec
23	41%	50 sec	21 sec
24	29%	38 sec	11 sec

Assumption: 480 calls/hour, 150 sec AHT= 20 hours workload

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Service Measures – A Different Look

Time of Day	Call Volume	Daily %	SL (in 20 sec)
6:00 – 7:00	85	4 %	100 %
7:00 – 8:00	90	5 %	100 %
8:00 – 9:00	95	6 %	95 %
9:00 – 10:00	145	8 %	90 %
10:00 – 11:00	185	10 %	75 %
11:00 – 12:00	195	11 %	60 %
12:00 – 1:00	165	9 %	80 %
1:00 – 2:00	185	10 %	70 %
2:00 – 3:00	220	12 %	60 %
3:00 – 4:00	210	11 %	65 %
4:00 – 5:00	145	8 %	90 %
5:00 – 6:00	125	6 %	100 %

Service Level Goal is 80% in 20 seconds

How did you do yesterday?

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Performance Measures

Real-Time Snap-Shots:

- Number of calls in queue
- Longest delay in queue (LDQ)
- Number of agents available
- ASA or service level



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Measuring Abandons

Abandon Rate

- Percentage of customers who hang up while waiting in queue (after ACD answers)
- Can be calculated by queue or entire center

$$\frac{\text{Number of contacts abandoned}}{\text{Number of contacts offered}}$$

Key Questions:

Do you control abandon rate?
What is the biggest factor affecting abandon rate?

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Calculating Service Level with Abandons

Seconds	Calls Abandoned	Calls Handled
0	0	201
5	6	22
10	1	28
15	4	26
20	2	22
30	3	18
45	1	21
60	4	25
90	0	12
120	2	10
Total	23	385

y=

Method 1:

$$\frac{\text{CH in y} + \text{CA in y}}{\text{Total CH} + \text{Total CA}} = \frac{333}{408} = 82\% \text{ SL}$$

Method 2:

$$\frac{\text{CH in y}}{\text{Total CH}} = \frac{317}{385} = 82\% \text{ SL}$$

Method 3:

$$\frac{\text{CH in y}}{\text{Total CH} + \text{Total CA}} = \frac{317}{408} = 78\% \text{ SL}$$

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Quality Measures

Internal Measures

- Monitoring scores
- Error and rework
- First call resolution



External Measures

- Customer surveys
- Complaints and praise

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Customer Survey Measures

Two Important Measures:

1. Central tendency (average)
2. Distribution
 - Describes dispersion of results
 - Shows how results are clustered around mean

	Low 1	2	Med 3	4	High 5	Mean	Standard Deviation
Data Set 1	15	0	5	0	15	3.0	1.88
Data Set 2	2	5	21	5	2	3.0	0.87

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Customer Satisfaction Measures

How Satisfied? AND How Important?

Importance	Area of Concern	Maintenance
	X X	X
	X X	X
	X	X X
	Less Concern	Potential Over-Emphasis
	X	X X
	X	X
	X	X X
		Satisfaction

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Who Cares About What?

- ✓ **Customers**
 - ✓ Service
 - ✓ Quality
- **Management**
 - Efficiency
 - Profitability
- **Frontline Staff**
 - Workload
 - Work environment
 - Career and learning



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Efficiency Measures

Resource Utilization

- Shrinkage
- Agent occupancy
- Schedule efficiency
- Self-service utilization



Contact Handling

- Average handle time (AHT)
- After call work (ACW)
- Hold times
- Transfer rates
- System speed and availability

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Calculating Shrinkage

Shrinkage

The percent of paid time an employee is not available to take calls

Examples

Paid breaks

Meetings

Off-phone time

Paid time off

Training

Unaccounted

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Calculating Shrinkage

Example

Paid time off: 8 hrs x 20 days	= 160 hours
Paid breaks: 1/2 hr/day x 5 days x 48 ¹ weeks	= 120 hours
Meetings/training: 3 hrs/week x 48 ¹ weeks	= 144 hours
Off-phone time: 1/2 hr/day x 5 x 48 ¹ weeks	= 120 hours
Unexplained: 1/4 hr/day x 5 x 48 ¹ weeks	= 60 hours

Total **604 hours**
(Available 2080 hours)

Shrinkage 29%

¹ 48 weeks assumes 2 weeks of vacation and 2 weeks of sick time off

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Applying Shrinkage

Example

33 staff (bodies in chairs) required ; shrinkage = 29%

Calculation:

Scheduled Staff = Base staff / (1 – shrinkage factor)

Scheduled Staff = 33 / (1 - .29)

Scheduled Staff = 33 / .71 = **46 staff**

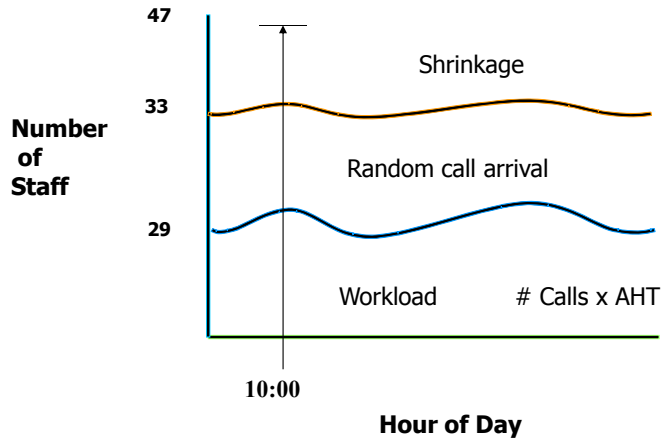


Wrong: 33 staff x 1.29 = 43 staff

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Understanding Staff Numbers

The Real Staff Needed



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Staff Occupancy

Occupancy: Percentage of time an agent is actually involved in call handling during the hour versus sitting in the idle state waiting for a call

- Affected by economies of scale and service goal
- Calculation:

$$\text{Agent occupancy} = \text{Workload hours} \div \text{Staff hours}$$

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Calculating Occupancy Rate

Number of Staff	Queued Portion	Delay of Delayed Calls	Average Delay (ASA)	Occupancy Rate
21	76%	150 sec	114 sec	95 %
22	56%	75 sec	42 sec	91 %
23	41%	50 sec	21 sec	87 %
24	29%	38 sec	11 sec	83 %

Assumption: 480 calls/hour, 150 sec AHT= 20 hours workload

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Efficiency Measures

Resource Utilization

- ✓ Shrinkage
- ✓ Agent occupancy
 - Schedule efficiency
 - Self-service utilization



Contact Handling

- Average handle time (AHT)
- After call work (ACW)
- Hold times
- Transfer rates
- System speed and availability

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Realistic Agent Measures

What Agents Control

- Talk time (?)
- After-call work (?)
- Adherence
- Quality

What Agents Don't Control

- Number of calls
- Call complexity

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Profitability Measures

- **Conversion rate:**
 - Percent of calls resulting in a sale
 - Percent of calls with add-on revenue
- **Revenues**
 - Sales per call (or per agent)
 - Sales per sign-on minute
- **Cost per call**

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Calculating Costs

Cost per Call

- Average cost to handle a single contact
- By queue or entire center
- Labor cost issues
 - Wages only vs. "loaded"
 - Variable vs. fixed
- Options



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Who Cares About What?



- ✓ **Customers**
 - ✓ Service
 - ✓ Quality
- ✓ **Management**
 - ✓ Efficiency
 - ✓ Profitability
- **Frontline Staff**
 - Workload
 - Work environment

What measures do you use for employee satisfaction?

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Calculating Attrition Rate

Calculation:

$$\text{Turnover Rate} = \frac{\text{Number of people that leave}}{\text{Total number of positions}}$$

Example:

$$\text{Turnover Rate} = \frac{80}{200} = 40\%$$

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Sample Turnover Calculation

Month	Departing Staff	Avg Number of Staff
1	4	75
2	2	78
3	3	80
4	6	80
5	5	82
6	5	84
7	4	85
8	5	85
9	6	85
10	4	82
11	5	82
12	5	80
Total	54	81.5

**Turnover
Rate**

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Calculating Turnover Rate

For your center:

$$\text{Turnover Rate} = \frac{??}{??} = \text{___} \%$$

What other ways should you measure turnover?

- By team
- By type of call
- Internal/external
- Voluntary/involuntary

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Employee Surveys

Benefits of Employee Surveys

- Improve morale.
- Identify operational improvements.
- Determine individual and group issues.
- Identify controllable factors.
- Increase staff retention.



Email us for sample
Employee Satisfaction
Survey.

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Call Center "Top Twenty"

- Call blockage
- Abandon rate
- Service level or ASA
- Schedule adherence
- Agent occupancy
- Scheduled to actual staff
- Self-service percentage
- Average handle time (AHT)
- Transfer percentage
- Cost per call
- Error/rework percentage
- Hold time
- First call resolution
- Sales conversion rate
- Sales per sign-on minute
- Quality monitoring scores
- Employee retention
- Customer retention
- Employee satisfaction
- Customer satisfaction

How many of these do you use?

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Top 10 List

Your Call Center:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.

Key Consideration:

What are the measures that most directly correlate with business objectives?

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- ✓ Establish a balanced set of performance objectives that align with company business goals.
- ✓ Identify objectives and critical measures for each stakeholder group.
- ✓ Define the most common performance measures for key roles related to service, efficiency, and profitability.
 - Review some of the math steps associated with call center KPIs.
 - Outline some of the approaches for reporting and sharing KPIs with others.

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Applying Shrinkage

Example

90 staff (bodies in chairs) required ; shrinkage = 26%

Calculation:

Scheduled Staff = Base staff / (1 – shrinkage factor)

Scheduled Staff = 90 / (1 - .26)

Scheduled Staff = 90 / .74 = 122 staff



Wrong: 90 staff x 1.26 = 113 staff

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Activity: Calculating Schedule Requirements

Calculation:

schedules = staff requirement / (1 - shrinkage)

Example:

200 "bodies in chairs" needed; shrinkage = 37%

schedules required = _____



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Weighted Average

- **What is it?**
 - A combined average that recognizes that one element may have more significance than other elements
- **How is it used in a call center?**
 - Weighted AHT from two different call handling groups
 - Calculation of AHT with recent data more significant
 - Recognition of some performance metrics as having more importance than others

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Calculating Weighted Average AHT



Sales Group: 500 calls, 360 sec AHT

Service Group: 300 calls, 300 sec AHT

Calculation: Weighted Avg AHT = $\frac{\text{total seconds}}{\text{total calls}}$

This example:

$$\frac{[(500 \times 360) + (300 \times 300)]}{500 \text{ calls} + 300 \text{ calls}} = \frac{270,000}{800} = 337.5 \text{ sec}$$

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Another Weighted Average Calculation

		Average Handle Time (last five Mondays)		
20%		240	10%	
20%		250	10%	
20%		275	10%	
20%		275	30%	
20%		280	40%	

Simple Average: 264 sec Weighted Average: 271 sec

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Service or Sales Emphasis

Category	Score
Customer Interaction	72
Sales Conversion	97
Technical Procedures	92
Attendance & Adherence	87

Balanced Scorecard =
87 (B)

Service Emphasis
60%
20%
10%
10%

Overall Score =
81 (C)

Sales Emphasis
10%
70%
10%
10%

Overall Score =

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Standard Deviation

- **What is it?**
 - A measure of how much variation or dispersion there is in a group of numbers
- **How is it used in a call center?**
 - Measure the range of performance among a team
 - Compare the variability of workload during a given half-hour across a number of weeks of history

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Calculating Variance



Two Important Measures:

1. Central tendency (average)
2. Distribution
 - Describes dispersion of results
 - Shows how results are clustered around mean
 - Is square root of the variance

	Low 1	2	Med 3	4	High 5	Mean	Standard Deviation
Data Set 1	15	0	5	0	15	3.0	1.88
Data Set 2	2	5	21	5	2	3.0	0.87

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Calculating Standard Deviation



The Calculation Steps:

1. Calculate the average of all data points.
2. Subtract the average from each point.
(Some will be negative numbers.)
3. Square each number and add them all together.
4. Divide total by number of data points.
5. Take the square root of that number for standard deviation.

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Calculating Standard Deviation

Compare the AHT of three teams of agents.

	Data Points	Average	Standard Deviation
Team A	367, 364, 364, 392, 364	370.2	
Team B	364, 360, 360, 362, 360	361.2	
Team C	372, 374, 374, 364, 374	371.6	

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Calculating Standard Deviation in Excel

You can use Excel to calculate the **Standard Deviation**.

1. List data points.
2. Enter formula:
=STDEVP()

The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G
1	Handle Time Data						
2							
3		Set 1	Set 2	Set 3			
4	Mon	367	364	372			
5	Tue	364	360	374			
6	Wed	364	360	374			
7	Thu	392	362	364			
8	Fri	364	360	374			
9							
10	avg	370.2	361.2	371.6			
11	std dev	10.96175	1.6	3.878144			
12							
13							

TIP:

Use STDEVP when you have the entire set of data and STDEV when you have a sample.

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Using Standard Deviation

- A tightly clustered group of numbers is shown by a lower standard deviation.
- A higher standard deviation may demonstrate that there are "outliers" in the data or just wide variations.
- Focus attention on high levels of variation to identify root causes of both very high and very low numbers.

	Low 1	2	Med 3	4	High 5	Mean	Standard Deviation
Data Set 1	15	0	5	0	15	3.0	1.88
Data Set 2	2	5	21	5	2	3.0	0.87

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Activity

How could you use standard deviation in your call center to assess:

1. Supervisor performance?
2. Forecasting accuracy?
3. Turnover statistics?
4. Revenue production?



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"Power of" Increments

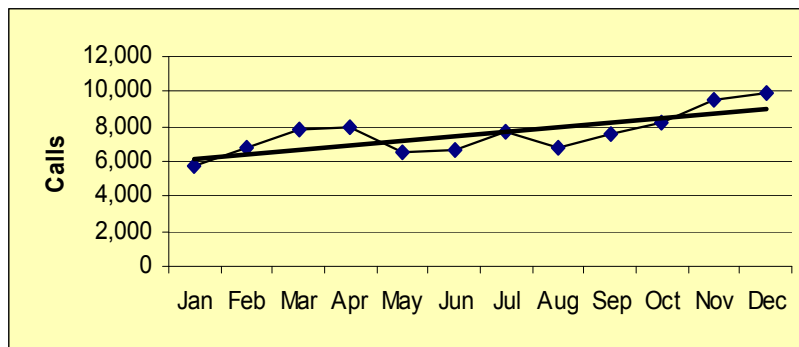


- **What is it?**
 - A mathematical function that means multiply this number times itself some number of times
- **How is it used in a call center?**
 - Detrending data for forecasting and seasonality analysis

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Time Series Forecasting

Sample Calling Pattern



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Time Series Forecasting

Calculating Seasonality

(the normal fluctuation experienced month to month)

Detrending: factoring out the influence of trend

- Calculate what a past month's call volume would be if it happened today.
- Bring old data up to the current time using monthly trend rate.

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Time Series Forecasting

Calculating Seasonality

Step 1: Detrend 12 months of call volume data.

(Actual monthly call volume) $\times(1+\text{Monthly trend})^P =$ Detrended call volume

P = 1 through 11, where 1 is the most recent month and 11 is the most distant month

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Calculating Seasonality

Detrending Example

Month	Monthly Volume	Months from Current	Detrended Volume
January	132,000	11	
February	128,000	10	
March	140,000	9	
April	146,000	8	
May	152,000	7	
June	147,000	6	
July	128,000	5	
August	156,000	4	
September	165,000	3	
October	170,000	2	
November	179,000	1	
December	182,000	current	

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Calculating Seasonality

The Detrending Process

- By definition, the **current** month doesn't need to be detrended. (December = 182,000)
- Calculate the two months prior to December:

$$\text{November} = 179,000 \times (1+.015)^1 = 181,685$$

$$\text{October} = 170,000 \times (1+.015)^2 = 175,138$$

Notice the small number after the parentheses in the formula. That is the "power of" indicator.

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Calculating Seasonality

Detrending Example

Month	Monthly Volume	Months from Current	Detrended Volume
January	132,000	11	155,489
February	128,000	10	148,549
March	140,000	9	160,075
April	146,000	8	164,468
May	152,000	7	168,696
June	147,000	6	160,736
July	128,000	5	137,892
August	156,000	4	
September	165,000	3	
October	170,000	2	175,138
November	179,000	1	181,685
December	182,000	current	182,000

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Calculating Seasonality - Solution

Detrending Solution

Month	Monthly Volume	Months from Current	Detrended Volume
January	132,000	11	155,489
February	128,000	10	148,549
March	140,000	9	160,075
April	146,000	8	164,468
May	152,000	7	168,696
June	147,000	6	160,736
July	128,000	5	137,892
August	156,000	4	165,573
September	165,000	3	172,537
October	170,000	2	175,138
November	179,000	1	181,685
December	182,000	current	182,000

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Implications of Rounding

- **What is it?**
 - Rounding reduces the number of decimals in a number. The number can be taken up to the next, down to the nearest below, or simply “truncated” by leaving out some digits but leaving the rest unchanged.
- **How is it used in a call center?**
 - Nearly every numerical calculation will have the potential for a rounding decision.

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The Multiplier Effect

Consider the way you will use the rounded number:

- If it is an end result, the impact will be relatively small.
- If it is a number that will be multiplied by other numbers, the impact will compound.

How much error can you tolerate?

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Quikstaff Activity

You estimate the handle time for your evening hours to be **4 minutes** per call.

What is the implication of using 4 minutes in your workload calculation versus the actual handle time of **4.25 minutes**?

Assume 600 calls and an ASA goal of 30 seconds

600 calls x 240 sec = ___ erlangs; ___ staff required

600 calls x 255 sec = _____erlangs; ___ staff required

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Quikstaff Activity

You estimate the handle time for your evening hours to be **4 minutes** per call.

What is the implication of using 4 minutes in your workload calculation versus the actual handle time of **4.25 minutes**?

Assume 600 calls and an ASA goal of 30 seconds

600 calls x 240 sec = 40 erlangs; 44 staff required

600 calls x 255 sec = 42.5 erlangs; 47 staff required

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Math Rules

- $()$ = Whenever some part of the calculation is in parentheses, do that function first before functions outside of the parentheses.

Example:

$$6 \times (1 - .27) = 4.38$$

$$6 \times 1 - .27 = 5.73$$

- Do multiplication and division first, then addition and subtraction functions.

$$6 \times 3 + 2 = (6 \times 3) + 2 = 20$$

$$6 \times 2 + 3 \times 4 + 5 - 1 = (6 \times 2) + (3 \times 4) + 5 - 1 = 28$$

- Remember: **My Dear Aunt Sally**

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A Scatter Diagram

Useful in analyzing the relationship between two sets of numbers:

- Call volume impact on AHT
- ASA impact on quality scores
- Impact of coaching time on turnover
- Customer satisfaction and level of importance for the issue
- Service level relationship to profitability

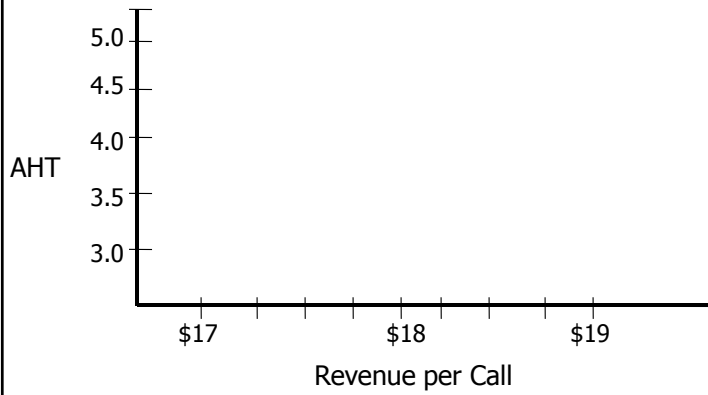
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Performance Statistics

Employee	AHT	Rev/Call
Adam	4.28	\$18.9
Betty	3.88	\$17.6
Calvin	5.24	\$17.8
Diane	4.54	\$19.0
Ethan	4.00	\$18.5
Fredia	3.23	\$17.5
Grant	4.86	\$19.2

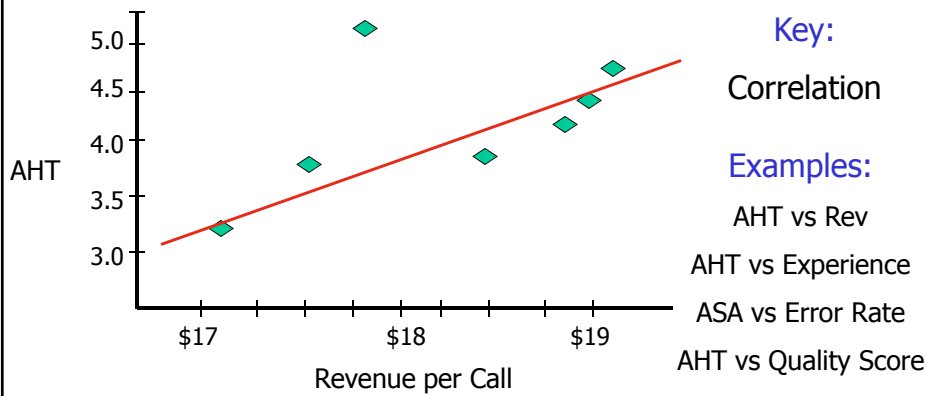
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Activity: Plot the Data



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Painting a Picture: Scatter Diagram



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Satisfaction Measures

	Customer 1	Customer 2	Customer 3	Customer 4	Customer 5
1 Sat	8	9	9	9	8
1 Imp	4	3	2	2	2
2 Sat	4	2	8	5	6
2 Imp	2	2	1	3	1
3 Sat	4	3	2	1	3
3 Imp	7	8	8	9	8
4 Sat	8	9	10	9	10
4 Imp	10	9	9	8	10

1 - Acceptable hold time

3 - Friendliness of personnel

2 - Music on hold

4 - Quality of information received

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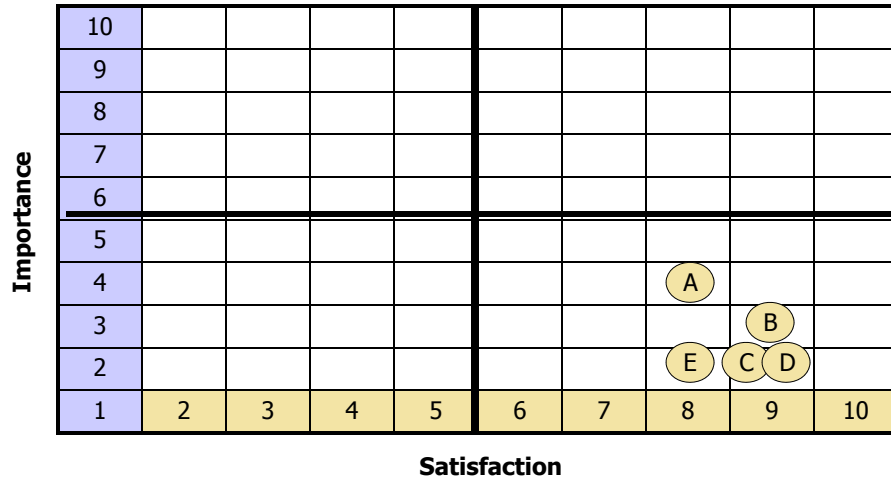
Acceptable Hold Time

Scatter Diagram Worksheet

Importance	10									
	9									
	8									
	7									
	6									
	5									
	4									
	3									
	2									
	1	2	3	4	5	6	7	8	9	10
Satisfaction										

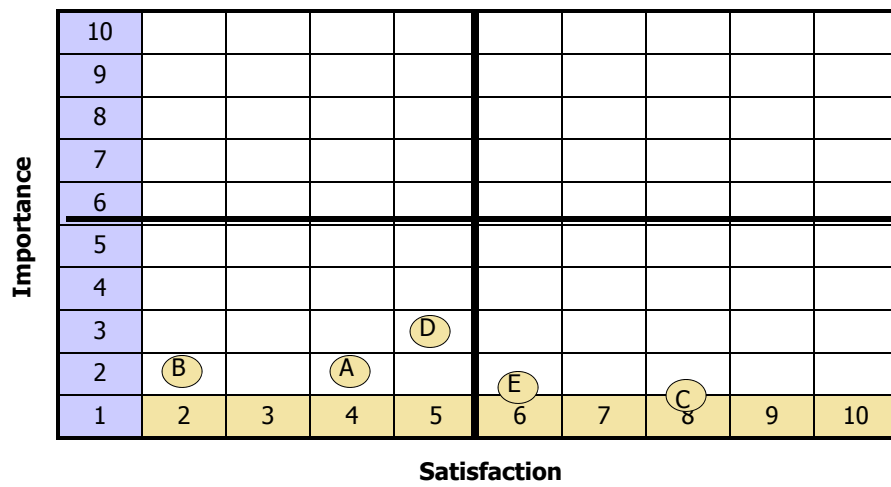
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Acceptable Hold Time



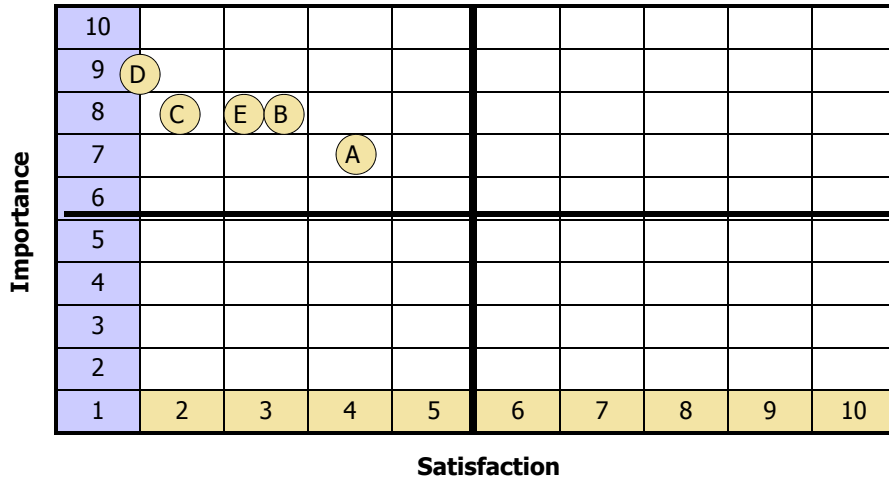
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Music on Hold



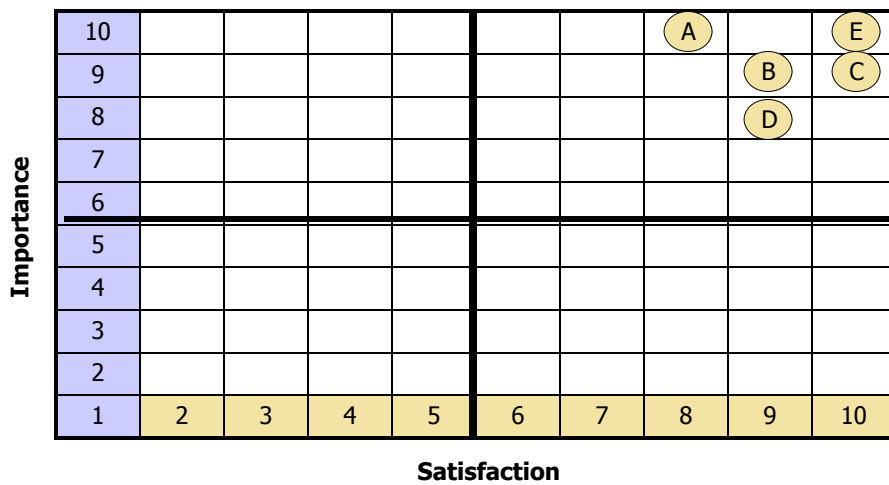
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Friendliness of Personnel



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Quality of Information



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Control Chart

Useful for analyzing the data to find outliers.

Examples:

- Periods when speed of answer was between acceptable parameters (e.g. 75-85%)
- Agents who have scores well above or below the norms of a team
- Periods of history that had unusual call volumes compared to same day/time periods

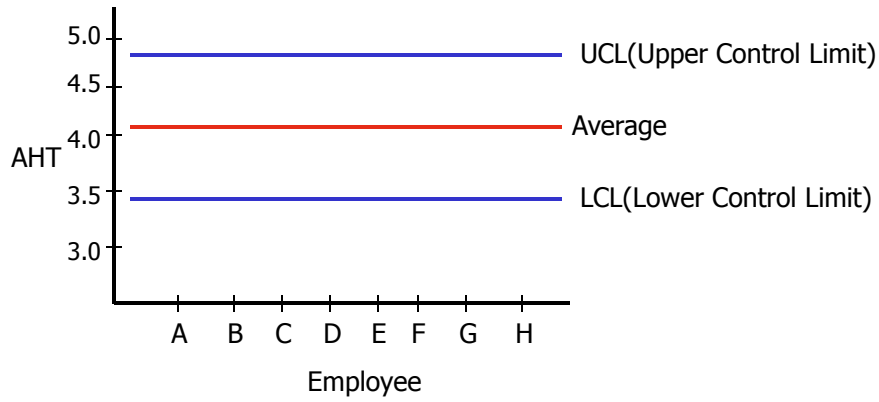
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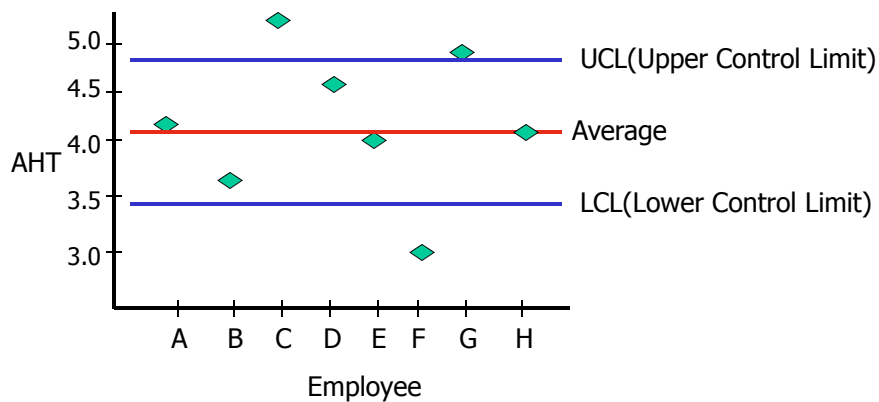
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Activity: Plot the Data



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Painting a Picture: Control Chart

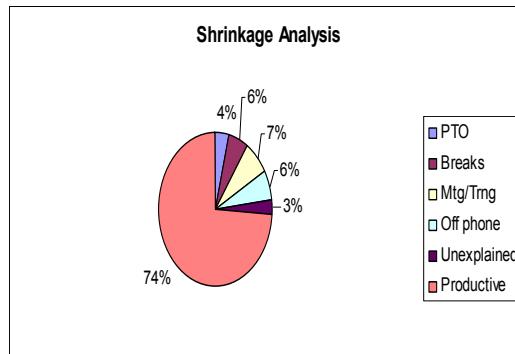


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Graphing in Excel

Shrinkage Calculation

PTO	80
Breaks	125
Mtg/Trng	150
Off phone	125
Unexplained	63
Productive	1537



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Session Overview

In today's session, you learned to:

- ✓ Establish a balanced set of performance objectives that align with company business goals.
- ✓ Identify objectives and critical measures for each stakeholder group.
- ✓ Define the most common performance measures for key roles related to service, efficiency, and profitability.
- ✓ Review some of the math steps associated with call center KPIs.
- ✓ Outline some of the approaches for reporting and sharing KPIs with others.

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Thank You!

Thank you for your participation today.



Good luck with your contact center KPIs!

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For More Information

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