Call Center Best Practices

The Road to World Class Performance!

MetricNet Best Practices Series
27 Years of Call Center Benchmarking Data

- Global Database
- More than 3,700 Call Center Benchmarks
- 30 Key Performance Indicators
- Nearly 80 Industry Best Practices
Growing importance of customer contact!

Every Company Faces Increasing Pressure from Numerous Sources

Industry Consolidation
Increased Regulatory Scrutiny (e.g. SOX)
The emergence of virtual business

Growing importance of customer contact!

One-Stop Shopping
Shareholder pressure
Budgetary constraints
Increasingly demanding customers
Greater customer choice and leverage
Customer Contact: A Critical Interface!

- Customer expectation is that you are available 24 X 7, and provide flawless service, on demand!
- Yet most companies have minimal direct contact with their customers

8760 Hours

7 - 22 minutes/yr.
Moment of Truth Opportunity!
Building a Service-Based Competitive Advantage!

A Fundamental Shift

OLD PARADIGM

- Call center is a support function
- Customer contact is a necessary evil
- Supplement to traditional bricks & mortar facilities
- Play catch up with customer needs and expectations – reactive!
- Goal is customer satisfaction

NEW PARADIGM

- Call center is a source of value creation
- Customer contact is a company and product differentiator
- Replacement for traditional brick & mortar facilities
- Stay ahead of customer needs and expectations – proactive!
- Goal is customer enthusiasm, and product differentiation
“Delight customers?! Why can’t we just satisfy them like we used to?”
Call Centers Must Evolve to Survive

Progression along this dimension is critical to success
Call centers that stay in one place too long risk obsolescence
The most effective call centers continually strive to add more value by moving to the right along this axis
World-class call centers also have specific plans for how they will continuously improve the quality of contact with their customers

Customer needs and requirements are evolving too quickly
Competitors can exploit any complacency marked by a call center’s failure to evolve
Staying ahead of customer needs and expectations
Continuously differentiate the underlying products supported
How Far Has Your Call Center Evolved?

- **Support Stage**: 65%
  - Traditional customer contact paradigm
- **Transitional Stage**: 30%
  - The call center makes a shift from following the customer to leading the customer
- **Strategic Stage**: 5%
  - The call center operates in a non-traditional customer contact paradigm – every transaction adds value!

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Data Comes from a Variety of Call Centers

- More than 3,700 call centers worldwide
  - From MetricNet’s Call Center Benchmarks
- Industries include
  - Banks and financial services
  - Telecommunications
  - Health Care
  - Hospitality
  - Insurance
  - Manufacturing
  - Retail
  - Transportation
  - Utilities
- Best practices are relatively independent of industry
  - At least 80% commonality from industry to industry
Characteristics of a World-Class Call Center

- Call center consistently exceeds customer expectations – regardless of the transaction type
  - Result is high levels of customer satisfaction
  - Call quality is consistently high
- Business value is managed at or above industry average levels
  - Cost per contact is below industry average levels
  - Revenue generated is above industry average levels
    - Telemarketing and Telesales
    - Debt collections
- Call Center follows industry best practices
  - Industry best practices are defined and documented
  - Call Center follows industry best practices
- Every transaction adds value
  - A positive customer experience
  - Improves customer loyalty
  - Creates positive brand awareness and switching costs
The World-Class Call Center Defined

A World-Class Call Center

Best-in-Class Performance Curve

Average Performance Curve

An “Average” Call Center

Quality

Higher

Lower

Cost per Contact

Higher
A Model for Best Practices:

Measure, Diagnose, Prescribe, Implement!
A Simple Model for Call Center Excellence

<table>
<thead>
<tr>
<th>Model Component</th>
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## Measure Your Performance!

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Two Types of Call Center Metrics

**Operational Metrics**
- Measures operational efficiency and effectiveness of the call center
- Internally focused
- Metrics include:
  - Cost per contact
  - Customer satisfaction
  - Speed of answer
  - Agent utilization
  - etc.

**Business Effectiveness**
- Measures the call center’s effectiveness in supporting the company’s business mission
  - Typically P&L or revenue related
- Externally focused
- Metrics include:
  - Sales $ per call center FTE
  - Collections $ per call center FTE
  - Call Center operating expense as a % of Call Center revenue generated
### Some Common Operational Metrics

#### Cost
- Cost per Contact
- Cost per Minute of Handle Time

#### Quality
- Customer Satisfaction
- Call Quality
- First Contact Resolution Rate

#### Productivity
- Agent Utilization
- Contacts per Agent per Month
- Agents as a % of Total Headcount

#### Agent
- Agent Occupancy
- Agent Turnover
- Daily Absenteeism
- New Agent Training Hours
- Annual Training Hours
- Schedule Adherence
- Agent Tenure
- Agent Job Satisfaction

#### Service Level
- Average Speed of Answer (ASA)
- Call Abandonment Rate
- % Answered in 30 Seconds

#### Call Handling
- Call Handle Time
- IVR completion rate

And there are hundreds more!!
Two Paradigms for Call Center KPI’s

The Historical Approach

- Measurement (75%)
- Analysis (15%)
- Prescription (7.5%)
- Action (2.5%)

The Holistic Approach

- Measurement (5%)
- Analysis (20%)
- Prescription (30%)
- Action (45%)

Increasing Value!
Operational Metrics: Which Ones Really Matter?

- **Cost**
  - Cost per Contact

- **Quality**
  - Customer Satisfaction

- **Productivity**
  - Agent Utilization

- **Call Handling**
  - First Contact Resolution Rate

- **Agent**
  - Agent Job Satisfaction

- **Aggregate**
  - Cost vs. Quality
  - Balanced Scorecard

Read MetricNet’s whitepaper on *Call Center Performance Metrics*. Go to [www.metricnet.com](http://www.metricnet.com) to get your copy!
Foundation Metrics: Cost vs. Quality

- **Top Quartile**: Efficient and Effective
- **Middle Quartiles**: Effective but not Efficient
- **Lower Quartile**: Efficient but not Effective
- **Lower Quality**
- **Middle Quartiles**
- **Higher Quality**

- **Higher Cost**
- **Lower Cost**
- **Quality (Effectiveness)**
- **Cost (Efficiency)**

- **Your Call Center**
- **Peer Group**
The Balanced Scorecard

**Step 1**
Five critical performance metrics have been selected for the scorecard.

**Step 2**
Each metric has been weighted according to its relative importance.

**Step 3**
For each performance metric, the highest and lowest performance levels in the benchmark are recorded.

**Step 4**
Your actual performance for each metric is recorded in this column.

**Step 5**
Your score for each metric is then calculated: (worst case – actual performance) / (worst case – best case) X 100.

**Step 6**
Your balanced score for each metric is calculated: metric score X weighting.

<table>
<thead>
<tr>
<th>Performance Metric</th>
<th>Metric Weighting</th>
<th>Performance Range</th>
<th>Your Actual Performance</th>
<th>Metric Score</th>
<th>Balanced Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost per Inbound Contact</td>
<td>25.0%</td>
<td>Worst Case $7.55</td>
<td>Best Case $3.33</td>
<td>$3.67</td>
<td>91.8%</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>30.0%</td>
<td>75.7%</td>
<td>91.2%</td>
<td>89.0%</td>
<td>85.8%</td>
</tr>
<tr>
<td>Agent Utilization</td>
<td>20.0%</td>
<td>47.5%</td>
<td>70.9%</td>
<td>66.1%</td>
<td>79.3%</td>
</tr>
<tr>
<td>Agent Job Satisfaction</td>
<td>15.0%</td>
<td>53.0%</td>
<td>93.3%</td>
<td>76.8%</td>
<td>59.1%</td>
</tr>
<tr>
<td>% of Calls Answered in 20 Seconds</td>
<td>10.0%</td>
<td>23.7%</td>
<td>75.3%</td>
<td>44.1%</td>
<td>39.5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>N/A</strong></td>
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Balanced Scorecard Summary*

Key Statistics

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<th>Call Center Scores</th>
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<tr>
<td>High</td>
<td>78.2%</td>
</tr>
<tr>
<td>Average</td>
<td>49.3%</td>
</tr>
<tr>
<td>Median</td>
<td>48.1%</td>
</tr>
<tr>
<td>Low</td>
<td>30.8%</td>
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<tr>
<td>XYZ</td>
<td>77.4%</td>
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</tbody>
</table>

*The scores shown in the chart are based upon the performance metrics, weightings, and data ranges shown on the previous page.
Track and Trend Performance Using the Scorecard

Call Center Balanced Score

- 12 Month Average
- Monthly Score

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Business Effectiveness Metrics

- Business effectiveness metrics are highly dependent upon the services you are offering
  - No “standard” set of measures
  - Generally related to product sales, customer retention, and revenue production and/or recovery
  - Lots of room for creativity
- Business effectiveness often trumps operational effectiveness
  - Reflects a focus on revenue growth and recovery
  - Allows some “sloppiness” on the operational side if the call center
- “Crossover Metrics”
  - Cover both operational and business effectiveness
  - Operating cost as a % of revenue generated is common
Some Common Business Effectiveness Metrics

**Credit Card**
- Cross-sell/upsell conversion rate (%)
- Number of Payment plans established

**Collections**
- Average Balance Saved (ABS)
- Promises kept (%)

**Cable Television**
- Number of Appointments scheduled
- Product count for new accounts

**Lending**
- Number of loans originated
- Average loan size and duration

**Telecom Services**
- Percent of billing inquiries resolved
- Customer cross-sell/upsell percentage

**Retirement Products**
- Rollover IRA conversion rate (%)
- Number of Variable annuity accounts opened
Benchmark Your Performance!

1. Measure
   Measure performance on an ongoing basis

2. Diagnose
   Benchmark performance and conduct gap analysis

3. Prescribe
   Define actions to close the gap

4. Implement
   Implement your action plan and improve performance

Model Component | Description
---|---
1. Measure | Measure performance on an ongoing basis
2. Diagnose | Benchmark performance and conduct gap analysis
3. Prescribe | Define actions to close the gap
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The Benchmarking Methodology

- Your Call Center Performance
  - Compare
- Performance of Benchmarking Peer Group
  - Determine How Best in Class Achieve Superiority
  - Adopt Selected Practices of Best in Class
  - Build a Sustainable Competitive Advantage

The ultimate objective of benchmarking

Read MetricNet’s whitepaper on *Call Center Benchmarking*. Go to [www.metricnet.com](http://www.metricnet.com) to receive your copy!
The Goal of Benchmarking

Diagnose

Quality

Higher

Lower

Cost per Contact

Higher

LOWER

AFTER BENCHMARKING

BEST-IN-CLASS PERFORMANCE CURVE

AVERAGE PERFORMANCE CURVE

STARTING POINT: BEFORE BENCHMARKING
## Benchmarking Performance Summary

**Sample Data Only! Not Intended for Benchmarking Purposes!**

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<td>$28.17</td>
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<td>59.0%</td>
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<td>Service Level</td>
<td>Average Speed of Answer (ASA) in seconds</td>
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<td>45</td>
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<td>Percent Answered in 30 Seconds or Less</td>
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Read MetricNet’s whitepaper on **Benchmarking Peer Group Selection**. Go to [www.metricnet.com](http://www.metricnet.com) to get your copy!
The Foundation Metrics: Cost and Quality

Cost/Contact (Efficiency)

Customer Satisfaction (Effectiveness)
Agent Utilization and First Contact Resolution Rate

Cost/Contact

Agent Utilization

Customer Satisfaction

First Contact Resolution

Diagnose
Agent Utilization Drives Cost per Contact

The chart illustrates the relationship between agent utilization and cost per contact. As agent utilization increases, the cost per contact decreases. This is evidenced by the downward trend line on the scatter plot, indicating a negative correlation.
Agent Utilization Defined

Agent Utilization  = \frac{((\text{Average number of inbound calls handled by an agent in a month}) \times (\text{Average inbound handle time in minutes}) + (\text{Average number of outbound calls handled by an agent in a month}) \times (\text{Average outbound handle time in minutes}))}{(\text{Average number of days worked in a month}) \times (\text{Number of work hours in a day}) \times (60 \text{ minutes/hr})}

- Agent Utilization is a measure of actual time worked by agents in a month, divided by total time at work during the month.
- It takes into account both inbound and outbound contacts handled by the agents.
- But it does not make adjustments for sick days, holidays, training time, project time, or idle time.
Example: Call Center Agent Utilization

- Inbound Contacts per Agent per Month = 375
- Outbound Contacts per Agent per Month = 225
- Average Inbound Contact Handle Time = 10 minutes
- Average Outbound Contact Handle Time = 5 minutes

Agent Utilization = \[
\frac{(\text{Average number of inbound Contacts handled by an Agent in a month}) \times (\text{Average inbound handle time in minutes}) + (\text{Average number of outbound Contacts handled by an Agent in a month}) \times (\text{Average outbound handle time in minutes})}{(\text{Average number of days worked in a month}) \times (\text{Number of work hours in a day}) \times (60 \text{ minutes/hr})}
\]

Agent Utilization = \[
\frac{(375 \text{ Inbound Contacts per Month}) \times (10 \text{ minutes}) + (225 \text{ Outbound Contacts per Month}) \times (5 \text{ minutes})}{(21.5 \text{ working days per month}) \times (7.5 \text{ work hours per day}) \times (60 \text{ minutes/hr})} = 50.4\%
\]

© MetricNet, LLC, www.metricnet.com
First Contact Resolution Drives Customer Satisfaction

First Contact Resolution

Customer Satisfaction

First Contact Resolution

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Service Levels: ASA and Abandonment Rate

- Cost/Contact
- Agent Utilization
  - Scheduling Efficiency
  - Service Levels: ASA and AR
- Customer Satisfaction
  - First Contact Resolution
ASA Drives Cost per Contact

Average Speed of Answer (sec)

Cost per Contact

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Call Abandonment Rate Also Drives Cost per Contact
ASA vs. Customer Satisfaction

ASA as a % of Total Handle Time

Customer Satisfaction

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Call Abandonment Rate vs. Customer Sat
Training Hours Impact First Contact Resolution Rate

- **Cost/Contact**
  - Agent Utilization
    - Scheduling Efficiency
    - Service Levels: ASA and AR

- **Customer Satisfaction**
  - First Contact Resolution
  - Training Hours
Annual Agent Training vs. First Contact Resolution

- **First Contact Resolution Rate**
- **Annual Agent Training Hours**

Diagnose

© MetricNet, LLC, www.metricnet.com
Agent Satisfaction

Cost/Contact

Agent Utilization

Scheduling Efficiency
Service Levels: ASA and AR

Customer Satisfaction

First Contact Resolution

Absenteeism/ Turnover

Agent Satisfaction
Agent Satisfaction Impacts Customer Satisfaction

![Graph showing the relationship between agent satisfaction and customer satisfaction. The x-axis represents agent satisfaction ranging from 50% to 100%, and the y-axis represents customer satisfaction ranging from 20% to 100%. There is a positive correlation indicated by a red line connecting the plotted points.](image-url)
Agent Satisfaction Drives Agent Turnover

The graph illustrates the correlation between Agent Satisfaction and Annual Turnover. The trend line shows a negative correlation, indicating that as Agent Satisfaction increases, Annual Turnover decreases.
Cause and Effect of Primary KPI’s

- **Cost/Contact**
  - **Agent Utilization**
    - Scheduling Efficiency
    - Service Levels: ASA and AR
  - **First Contact Resolution**
    - Absenteeism/Turnover
      - Agent Satisfaction
  - **Training Hours**

- **Customer Satisfaction**
  - **First Contact Resolution**
Training Hours Drive Agent Satisfaction

![Graph showing the relationship between annual agent training hours and agent satisfaction. The graph indicates a positive correlation, with agent satisfaction increasing as annual training hours increase.]
A Summary of the Major KPI Correlations

Cost/Contact

Agent Utilization

Service Levels: ASA and AR

Agents/Total FTE’s

Absenteeism/Turnover

First Level Resolution

Handle Time

Call Quality

First Contact Resolution

Agent Satisfaction

Scheduling Efficiency

Service Levels: ASA and AR

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Career Path

Training Hours
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Prescribe Actions to Close the Gap!

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## Best Practices: Performance Measurement

### Performance Measurement: Best Demonstrated Practices

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<th>Metrics, goals, diagnosis and accountability</th>
<th>Performance metrics and goals drive individual accountability and facilitate diagnosis of performance strengths, issues, gaps and call quality improvements.</th>
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<tr>
<td>Cost and customer satisfaction</td>
<td>Cost and customer satisfaction results measure efficiency and effectiveness, and are two critical indicators for call center operations.</td>
</tr>
<tr>
<td>Formal measurements &amp; performance compliance</td>
<td>Performance measurement is a rigorous discipline assigned to a particular individual or individuals in the call center to ensure service level compliance and consistency in the delivery of customer service.</td>
</tr>
<tr>
<td>Balanced scorecard</td>
<td>A balanced scorecard provides an aggregate measure of call center performance.</td>
</tr>
<tr>
<td>Management Reporting</td>
<td>Reporting is targeted and timed to have maximum impact on key individuals and stakeholder groups in the company.</td>
</tr>
</tbody>
</table>

### Affected KPI’s

<table>
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<tr>
<th></th>
<th>Cost/Call</th>
<th>Customer Sats</th>
<th>Utilization</th>
<th>First Call Res</th>
<th>Call Quality</th>
<th>Handle Time</th>
<th>Turnover</th>
<th>Business Effectiveness</th>
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</thead>
<tbody>
<tr>
<td>Metrics, goals,</td>
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<td>Cost and customer</td>
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<td>Balanced scorecard</td>
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<td>Reporting</td>
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</tr>
</tbody>
</table>
Best Practices: Human Resources

<table>
<thead>
<tr>
<th>Human Resources: Best Demonstrated Practices</th>
<th>Affected KPIs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recruitment</strong></td>
<td></td>
</tr>
<tr>
<td>Recruiting is a rigorous and holistic process that measures specific agent competencies, and matches those competencies to the needs of the call center.</td>
<td></td>
</tr>
<tr>
<td><strong>Training</strong></td>
<td></td>
</tr>
<tr>
<td>Rigorous and formalized training is available for both new and seasoned agents. Training is customized to meet the needs of each agent, and is designed to meet the strategic goals of the call center.</td>
<td></td>
</tr>
<tr>
<td><strong>Career Pathing</strong></td>
<td></td>
</tr>
<tr>
<td>Career paths have been formalized and documented, and often include vertical as well as lateral promotion opportunities. Performance levels required for advancement are clearly articulated. Agents are encouraged to take charge of their own career and skills development.</td>
<td></td>
</tr>
<tr>
<td><strong>Retention</strong></td>
<td></td>
</tr>
<tr>
<td>Formal strategies are employed to maximize employee retention. These strategies are designed to improve employee job satisfaction and loyalty, thereby maximizing agent morale and minimizing turnover.</td>
<td></td>
</tr>
<tr>
<td><strong>Coaching and Feedback</strong></td>
<td></td>
</tr>
<tr>
<td>Call center management demonstrates commitment to continuous improvement by conducting frequent, one-on-one coaching to each agent, and by providing specific suggestions for improvement and setting attainable goals.</td>
<td></td>
</tr>
<tr>
<td><strong>Performance Standards</strong></td>
<td></td>
</tr>
<tr>
<td>Call center agents are held accountable for minimum performance standards with incentives for surpassing, and disincentives for falling short of the standard. Performance goals cover both quality and productivity.</td>
<td></td>
</tr>
</tbody>
</table>
# Best Practices: Call Handling Practices

## Call Handling Practices: Best Demonstrated Practices

<table>
<thead>
<tr>
<th>Call Handling Practices</th>
<th>Affected KPI's</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Standardization</strong></td>
<td>Cost/Call, Customer Sat, First Call Res, Call Quality</td>
</tr>
<tr>
<td><strong>Call Volume Management</strong></td>
<td>Utilization, Handle Time, Turnover</td>
</tr>
<tr>
<td><strong>Measurement Management</strong></td>
<td><strong>Continuous Improvement</strong></td>
</tr>
<tr>
<td><strong>Customer-Centricity</strong></td>
<td><strong>Customer-Centricity</strong></td>
</tr>
</tbody>
</table>

- **Standardization:** Call handling processes are repeatable and standardized, while still allowing for agent judgment and experience.

- **Call Volume Management:** Call handling strategies, such as call reduction through “Load Shedding,” call “Channeling,” forecasting and aggressive staffing strategies are utilized to predict and proactively handle the variance in call volumes.

- **Measurement Management:** Call centers must aggressively pursue and identify meaningful performance indicators, measure and report against them and analyze the results for significant trend analysis.

- **Continuous Improvement:** Call center has a true culture of excellence through continuous improvement in the delivery of customer services.

- **Customer-Centricity:** Improved customer satisfaction, accessibility and usability are the primary design drivers in the call center.
## Best Practices: Technology

### Technology: Best Demonstrated Practices

<table>
<thead>
<tr>
<th>Technology Hierarchy</th>
<th>Technology enhances the speed and quality of each transaction. It supplements people and process, but does not replace them.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategic Alignment of Technology</td>
<td>Call center technology is consistent with, and supports the strategies of the call center and the enterprise overall.</td>
</tr>
<tr>
<td>Vendor Management</td>
<td>Vendors are actively managed to ensure the adoption of appropriate technology, and good value in technology purchases. The buyer drives the vendor relationship.</td>
</tr>
<tr>
<td>Call Management Customer Tools</td>
<td>The call center and its agents have access to real-time tools that optimize call flow management, call logging and tracking to achieve resolution.</td>
</tr>
<tr>
<td>Knowledge Management</td>
<td>Knowledge capture and customer history are used to enhance the value of each customer interaction.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Affected KPI’s</th>
<th>Cost/Call</th>
<th>Customer Sat</th>
<th>Utilization</th>
<th>First Call Res</th>
<th>Call Quality</th>
<th>Handle Time</th>
<th>Turnover</th>
<th>Business Effectiveness</th>
</tr>
</thead>
<tbody>
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<td></td>
</tr>
</tbody>
</table>
Implement Your Action Plan!

<table>
<thead>
<tr>
<th>Model Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Measure</td>
<td>Measure performance on an ongoing basis</td>
</tr>
<tr>
<td>2. Diagnose</td>
<td>Benchmark performance and conduct gap analysis</td>
</tr>
<tr>
<td>3. Prescribe</td>
<td>Define actions to close the gap</td>
</tr>
<tr>
<td>4. Implement</td>
<td>Implement your action plan and improve performance</td>
</tr>
</tbody>
</table>
The Key to Improvement is to Take Action!

- Call Center Best Practices is a Holistic Discipline
- Near Term Goal: Improved Performance
- Ultimate Goal: World-Class Performance
- The Key to Getting Results is to Take Action!

Just Do It!!
Now Implement Your Action Plan!

Support Stage
- Document call handling standards

Transitional Stage
- Begin customer sat surveys
- Establish root cause analysis program

Strategic Stage
- Rewrite IVR menus

Support Stage
- Create a balanced scorecard

Transitional Stage
- Document agent career path options

Strategic Stage
- Define agent performance standards
- Implement call monitoring

JAN FEB MAR APR MAY JUN JUL AUG SEP OCT NOV DEC
Prioritizing Your Action Plan

URGENCY
- High
- Med
- Low

RELATIVE COST
- Higher
- Lower

RELATIVE IMPACT
- Higher
- Lower

Implement

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And Establish Performance Goals

- Define KPIs to track and trend
- Measure baseline performance
- Establish "stretch" goals for each KPI
- Measure performance at least monthly
- Post performance trends and periodically reset goals

<table>
<thead>
<tr>
<th>DOMAIN</th>
<th>PERFORMANCE METRIC</th>
<th>CURRENT PERFORMANCE</th>
<th>PERFORMANCE GOAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Call Center</td>
<td>Cost per Contact</td>
<td>$27.90</td>
<td>$21.00</td>
</tr>
<tr>
<td></td>
<td>Customer Satisfaction</td>
<td>71%</td>
<td>80%</td>
</tr>
<tr>
<td></td>
<td>Agent Utilization</td>
<td>49%</td>
<td>60%</td>
</tr>
<tr>
<td></td>
<td>First Contact Resolution</td>
<td>61%</td>
<td>70%</td>
</tr>
<tr>
<td></td>
<td>Agent Satisfaction</td>
<td>56%</td>
<td>75%</td>
</tr>
<tr>
<td></td>
<td>Balanced Score</td>
<td>52%</td>
<td>70%</td>
</tr>
<tr>
<td>Agent</td>
<td>Customer Satisfaction</td>
<td>By Individual</td>
<td>85%</td>
</tr>
<tr>
<td></td>
<td>Number of Contacts Handled per Month</td>
<td>By Individual</td>
<td>650</td>
</tr>
<tr>
<td></td>
<td>Call Quality</td>
<td>By Individual</td>
<td>90 out of 100</td>
</tr>
<tr>
<td></td>
<td>First Contact Resolution</td>
<td>By Individual</td>
<td>75%</td>
</tr>
</tbody>
</table>
# The CSR Scorecard

<table>
<thead>
<tr>
<th>Performance Metric</th>
<th>Metric Weighting</th>
<th>Benchmark Performance Range</th>
<th>Your Actual Performance</th>
<th>Metric Score</th>
<th>Balanced Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inbound Contacts Handled</td>
<td>25.0%</td>
<td>Worst Case 350 Best Case 550</td>
<td>447</td>
<td>48.7%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>20.0%</td>
<td>60.0% 95.0%</td>
<td>90.0%</td>
<td>85.7%</td>
<td>17.1%</td>
</tr>
<tr>
<td>Technician Utilization</td>
<td>15.0%</td>
<td>30.0% 60.0%</td>
<td>41.5%</td>
<td>38.4%</td>
<td>5.8%</td>
</tr>
<tr>
<td>First Contact Resolution Rate</td>
<td>15.0%</td>
<td>60.0% 90.0%</td>
<td>85.0%</td>
<td>83.3%</td>
<td>12.5%</td>
</tr>
<tr>
<td>Teamwork</td>
<td>10.0%</td>
<td>1 5</td>
<td>4</td>
<td>75.0%</td>
<td>7.5%</td>
</tr>
<tr>
<td>Initiative</td>
<td>10.0%</td>
<td>1 5</td>
<td>3</td>
<td>50.0%</td>
<td>5.0%</td>
</tr>
<tr>
<td>Mentoring</td>
<td>5.0%</td>
<td>1 5</td>
<td>5</td>
<td>100.0%</td>
<td>5.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>100.0%</strong></td>
<td><strong>N/A</strong></td>
<td><strong>N/A</strong></td>
<td><strong>N/A</strong></td>
<td><strong>65.1%</strong></td>
</tr>
</tbody>
</table>

**Step 1**
Seven critical performance metrics have been selected for the scorecard.

**Step 2**
Each metric has been weighted according to its relative importance.

**Step 3**
For each performance metric, the highest and lowest performance levels in the benchmark are recorded.

**Step 4**
The technician’s actual performance for each metric is recorded in this column.

**Step 5**
The technician’s score for each metric is then calculated: (worst case – actual performance) / (worst case – best case) x 100.

**Step 6**
The technician’s balanced score for each metric is calculated: metric score x weighting.
## Monthly Agent Performance Postings

<table>
<thead>
<tr>
<th>Agent Number</th>
<th>Monthly Ranking</th>
<th>Monthly Scorecard Performance</th>
<th>Six Month Average</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Sep</td>
<td>Aug</td>
</tr>
<tr>
<td>11</td>
<td>1</td>
<td>95.8%</td>
<td>98.0%</td>
</tr>
<tr>
<td>32</td>
<td>2</td>
<td>92.8%</td>
<td>92.1%</td>
</tr>
<tr>
<td>21</td>
<td>3</td>
<td>91.5%</td>
<td>88.5%</td>
</tr>
<tr>
<td>35</td>
<td>4</td>
<td>91.0%</td>
<td>86.8%</td>
</tr>
<tr>
<td>14</td>
<td>5</td>
<td>89.5%</td>
<td>89.1%</td>
</tr>
<tr>
<td>26</td>
<td>6</td>
<td>83.8%</td>
<td>84.4%</td>
</tr>
<tr>
<td>25</td>
<td>7</td>
<td>83.0%</td>
<td>73.6%</td>
</tr>
<tr>
<td>15</td>
<td>8</td>
<td>70.4%</td>
<td>66.6%</td>
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<tr>
<td>20</td>
<td>9</td>
<td>64.9%</td>
<td>66.5%</td>
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<tr>
<td>31</td>
<td>10</td>
<td>62.3%</td>
<td>47.4%</td>
</tr>
<tr>
<td>16</td>
<td>11</td>
<td>61.0%</td>
<td>62.8%</td>
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<tr>
<td>17</td>
<td>12</td>
<td>57.9%</td>
<td>42.1%</td>
</tr>
<tr>
<td>33</td>
<td>13</td>
<td>56.8%</td>
<td>75.5%</td>
</tr>
<tr>
<td>13</td>
<td>14</td>
<td>52.2%</td>
<td>34.9%</td>
</tr>
<tr>
<td>24</td>
<td>15</td>
<td>48.9%</td>
<td>66.7%</td>
</tr>
<tr>
<td>28</td>
<td>16</td>
<td>46.4%</td>
<td>45.5%</td>
</tr>
<tr>
<td>27</td>
<td>17</td>
<td>43.7%</td>
<td>26.5%</td>
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<tr>
<td>19</td>
<td>18</td>
<td>41.5%</td>
<td>28.4%</td>
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<tr>
<td>23</td>
<td>19</td>
<td>39.1%</td>
<td>52.3%</td>
</tr>
<tr>
<td>22</td>
<td>20</td>
<td>36.8%</td>
<td>18.7%</td>
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<tr>
<td>12</td>
<td>21</td>
<td>36.6%</td>
<td>43.2%</td>
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<tr>
<td>30</td>
<td>22</td>
<td>36.3%</td>
<td>22.6%</td>
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<tr>
<td>29</td>
<td>23</td>
<td>34.1%</td>
<td>44.9%</td>
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<tr>
<td>34</td>
<td>24</td>
<td>33.4%</td>
<td>37.9%</td>
</tr>
<tr>
<td>18</td>
<td>25</td>
<td>32.6%</td>
<td>68.4%</td>
</tr>
</tbody>
</table>

| Monthly Average | 59.3% | 58.5% | 58.0% | 65.5% | 66.0% | 68.4% | 62.6% |
# Summary: Call Center Best Practices

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The Traditional Paradigm for Call Centers

PEOPLE

PROCESS

TECH
Metrics: An Even More Fundamental Building Block!
The Evidence for Metrics as a Foundation Block

Metrics Maturity Ranking

Call Center Balanced Score

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Questions?
Visit MetricNet at the Annual HDI Conference in Orlando, FL!
More info at metricnet.com/hdiconf16

Session 105: The Future of Desktop Support: What the KPIs Are Telling Us
*Wednesday, April 13 at 10:15 AM*

Session 407: The Diagnostic Power of Metrics
*Thursday, April 14 at 10:00 AM*
Questions?
Thank You!
Your Speaker: Jeff Rumburg

- Co Founder and Managing Partner, MetricNet, LLC
- Winner of the 2014 Ron Muns Lifetime Achievement Award
- Former CEO, The Verity Group
- Former Vice President, Gartner
- Founder of the Service Desk Benchmarking Consortium
- Author of *A Hands-On Guide to Competitive Benchmarking*
- Harvard MBA, Stanford MS
Benchmarking is MetricNet’s Core Business

- Information Technology
  - Service Desk
  - Desktop Support
  - Field Support

- Call Centers
  - Customer Service
  - Technical Support
  - Telemarketing/Telesales
  - Collections

- Telecom
  - Price Benchmarking

- Satisfaction
  - Customer Satisfaction
  - Employee Satisfaction

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27 Years of Call Center Benchmarking Data

- Global Database
- More than 3,700 Call Center Benchmarks
- 30 Key Performance Indicators
- Nearly 80 Industry Best Practices
Meet a Sampling of Our Clients

MetricNet Conducts benchmarking for call centers worldwide, and across virtually every industry sector.

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Thank You!