

# Contact Center Intelligence

## Leveraging Performance Optimization to Help Achieve Corporate Objectives

### Executive Summary

During the past decade or so, companies have had to shift the way they do business, which is largely being driven by consumers' widespread use of the Internet. Having access to vast amounts of information is enabling these consumers to make better, more educated choices about the companies with which they do business. There is a significant increase in global competition that is occurring as consumers gain the ability to access, compare, and purchase products and services from a never-ending number of companies via the Internet. As a result, contact centers are being seen as competitive differentiators, rather than as compulsory cost centers.

This shift in perception, coupled with increasingly demanding consumers, is putting a sizeable amount of pressure on contact center managers to maximize their agents' performance and to improve their operations. To meet these elevated expectations, contact center managers must begin to optimize their contact center resources and enhance the quality of the experiences their centers are providing.

But how is this accomplished? By synchronizing people, applications, and processes, contact center managers can reduce labor costs, enhance service levels, and build customer loyalty; but, most importantly, they can align operations with their company's overall strategic objectives. Contact centers that are successful in these efforts will be able to meet executive and consumer mandates, and drastically increase the overall value they contribute to the corporation.



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### Cascading Objectives

All too frequently, companies implement call routing solutions, outbound dialers and siloed performance optimization products, such as campaign management or quality monitoring, in their contact centers with no real coordinated strategy for making the most of the wealth of information that these products yield. Understanding, and most importantly, aligning the contact center with corporate objectives is the key to driving its overall performance. But, deploying the right tools is only part of the equation. Businesses need to use these tools to analyze and evaluate the right metrics, properly train agents, improve business processes, and enhance customer interactions all with a keen eye on how the contact center can help the organization meet or exceed its strategic goals.

Developing successful customer service, collections or sales and telemarketing strategies requires that managers truly understand their contact center metrics in the context of overall business and financial goals. These same managers must then determine what information will best help them identify whether or not the contact center is successfully contributing to corporate objectives. And the metrics may not be the same ones that contact centers have traditionally used in the past to measure their performance.

For example, an organization that wants to increase profitability by 20 percent, decrease operating costs by 10 percent, and improve customer retention rates by eight percent should translate these high-level objectives into operational metrics, such as *Revenue per Call*, *Schedule Compliance*, and *Service Level* or *Agent Quality Scores* in order to drive strategic success across sales, collections, and customer service processes.

They can then use operational metrics to develop long-term benchmarks and identify the key performance indicators (KPIs) that will enable them to align with the business strategy and provide accountability that they are meeting those goals. In addition, it offers agents a comprehensive view of their overall performance so they can make adjustments to ensure they are meeting their individual objectives. Most importantly, the contact center will have the business metrics that enables every member of the team to see how they are contributing to the business.

KPIs, which could include *Talk Time*, *Average Handle Time*, *Contacts Handled*, *Shrinkage* and *Schedule Adherence*, for example, are essential to measuring and optimizing the intraday and day-to-day performance of the contact center. Because every organization has different business objectives, KPIs will vary by company. It's important that long-term benchmarks and KPIs be clearly communicated to frontline employees—such as agents, supervisors and business analysts—so they understand how their individual contributions are impacting the greater whole. And, if possible, KPIs should be linked directly to compensation to ensure a higher likelihood of achieving contact center and corporate goals.

### Preparing for the Customer Experience

Once the overarching and cascading objectives, strategies and tactics have been determined and they align with the business's goals, it is time to define and execute a well thought-out workflow. Business rules define specific workflows and govern how contacts are handled, priorities are followed, agents are assigned, and key actions are managed. Establishing logical and productive business rules takes time, and once they are active, they must be regularly monitored and adjusted as business conditions and customer demands change.

Business rules should be consistently maintained across all channels in order to optimize performance in a contact center that offers customers multiple interaction channels. For example, when an airline customer moves from gold to platinum status, the change should be reflected in how that customer is treated when they call, email or engage in a Web chat with an agent. Similarly, when an agent develops new skills and is capable of handling an additional set of customer issues, that agent's new skills should be propagated across all applications and business rules that impact which customers are routed to that agent.

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*To meet elevated consumer expectations, contact center managers must begin to optimize their contact center resources and enhance the quality of the service their centers are providing.*

### Performing Up to Par

After a customer has been connected to the right agent with the skills to help address their specific needs, the remainder of that customer's experience is completely dependant on the agent's ability to resolve the issue in a professional and articulate manner. This can impact how much future business a customer will conduct with a company. In fact, a recent survey said that a consumer who is satisfied with a representative is two-and a-half times more likely to conduct future business with a company<sup>1</sup>. But, how can managers be sure that their agents are delivering the best possible service?

In order to provide exceptional service, agents must have a thorough knowledge of company goals, policies, and products, in addition to understanding the role their performance plays in corporate success. The information gathered by contact center intelligence applications can be used to train agents, measure their performance, and then provide that information back to the agent in a prompt and effective manner. If the center missed its performance targets, managers must figure out why. Are the right agents scheduled to work at the right times? Do agents require more training and coaching? Was schedule compliance too low?

### The Tools of the Trade

Understanding corporate strategy and recognizing that the performance of the contact center can make or break the company's ability to meet its goals can be a heavy load to carry. And, at first it probably seems an almost impossible task to try to juggle so many demands – ensuring the right agents are available to handle the right number of calls, monitoring their progress to see if they are meeting KPIs or even basic call metrics, and regularly checking to see that workflows are providing consumers with a positive experience as they interact with the contact center.

But, there are a number of specialized applications that can be used to help contact center managers consider everything that has happened in the contact center and then develop a logical plan that can control costs, enhance service levels and align performance with strategic goals. As well, these applications can enable contact center managers and agents to act immediately to make goals-driven adjustments across multiple work groups and locations.

They include the following:

1. **Workforce Management** actively balances agents versus service or campaign goals in an effort to meet overall contact center objectives at a minimum cost. It helps agents to deliver consistent, optimal customer service across inbound and outbound operations through efficient schedule creation and adherence. Increases in customer satisfaction and campaign efficiencies translate into increased revenues by reducing abandoned, permanently lost, or wrong party contacts and converting them to up-sell opportunities.
2. **Call Recording and Quality Management** establishes agent qualitative performance targets which are difficult to obtain through other purely quantitative sources. It provides the capabilities for full time or rules-based recording, reviewing and reporting on customer interactions, which can be used to help improve agent performance and job satisfaction, increase customer satisfaction and revenue generation, and better manage overall costs.
3. **Performance Management** tools can unite all of the data from the many different sources across the contact center to provide a unified view of performance, while aligning that to strategic goals. It gives users the ability to analyze root causes and take corrective actions. Companies can define their corporate objectives, such as customer satisfaction improvement; translate these objectives into supporting operational key performance indicators, and use performance management tools to share the goals with everyone in the organization. The tools also allow employees—from executives to agents—to monitor actual to targeted performance to ensure that the organization

<sup>1</sup> Aspect Contact Center Satisfaction Index – North America. May 2007.

and individuals are on track. Finally performance management tools provide agent and employee coaching capabilities to drive continuous improvement.

4. **Campaign Management** leverages best time to call applications to ensure maximum outbound campaign productivity and strategy management by increasing right party contact rates for collections, telemarketing and proactive customer service which translates into more dollars collected, higher sales per hour or improved customer contact with lower telecommunications charges. Campaign Management can track call result history over time and use this information to predict best number to call and the best hour of the day to reach the customer. Using outbound workforce management capabilities, companies can also ensure they have the appropriate number of staff available to manage call volumes. Scheduling and managing the right agents at the right times with the highest productivity work yields the best return on investment in both contact center human and system resources.
5. **Speech Analytics** automatically scrutinizes and reports on content, context, purpose and outcome of every recorded customer interaction as part of the quality monitoring process. Its objective is to identify trends or variations in customer interactions that can impact overall customer satisfaction, the quality of the service the agent is providing, sales performance or marketing effectiveness. This information then enables companies to act immediately to improve the overall performance of the organization.
6. **eLearning** provides additional skills training for agents that is naturally suited to distance learning or flexible learning, but can also be used in conjunction with face-to-face coaching. eLearning provides the training capabilities which enables agents to hone their skills based on the feedback they have received through quality monitoring and the speech analytics tools.

Also, don't dismiss the data gathered by automatic call distributors, dialers, voice portals and other telephony platforms. These applications provide critical agent and queue level data that can be used, along with the other information being pulled by analytics applications, to gauge the performance of the entire contact center on both a real-time and historical basis.

### **Making the Grade**

Looking at the intelligence created in the contact center from a strategic perspective provides greater opportunity for engaging customers, maximizing agent performance, optimizing resources, and improving the quality of interactions and the customer experience delivered. And, when contact centers align strategic business objectives with the goals of front-line employees, it is much more likely to achieve success. Setting expectations in advance ensures that employees can be praised for meeting corporate goals or held accountable if they don't.

However, the right tools won't make a difference in a contact center that isn't analyzing and evaluating the right metrics, or has not properly trained its agents. The real mark of a successful contact center is what happens after the agent is connected to the customer, and this is entirely dependent on the customer's ability to reach a knowledgeable and empathetic agent, who can provide fast and efficient service.

Performance optimization solutions make it easier for contact centers to be proactive because they know what's happened in the past, they can see what's currently going on in the contact center, take

action right away to make intraday adjustments and plan for future scenarios. Ultimately, they have the tools, knowledge and power to ensure they are meeting both consumer demands and achieving overarching strategic corporate goals. Using the right data for the right reasons can help contact centers consider everything that is happening and act immediately to improve their performance, meet the soaring expectations of senior executives, and make greater contributions to the bottom line.

#### **Real World Performance Optimization**

Aspect® eWorkforce Management™ has vastly improved productivity for a telecommunications company by allowing their supervisors to automate the complicated process of managing agent schedules as well as allowing agents to bid for shifts, vacations, and other events. In addition, agents can now view their call handle time and schedules in the system—enabling them to control and maximize their own performance. As a result, the company is seeing a boost in employee job satisfaction and a decrease in absenteeism of almost 10 percent. In addition, the product is decreasing labor costs significantly because it enables the telecommunications contact center to understand the need for overtime hours and schedule accordingly. In fact, the company estimates a return on investment of 11 percent after the first year and an overwhelming return on investment of 118 percent after the second year.

After implementing Aspect® Campaign Optimizer™ for outbound campaign management, dialing operations were enhanced for a large banking organization. Over a period of 60 days, the company saw a 35 percent increase in right party contacts. In addition, the precision of collections campaigns was improved and the system actually assumed campaign management duties, freeing-up the company's dialer administrator to oversee other aspects of the collections process. And, the Aspect Campaign Optimizer integration with its Aspect Software dialer has decreased agent idle time between calls by an average of eight seconds and within six months the company also saw a 10 percent increase in agent productivity.

A national healthcare organization was looking for a solution to enable easy access to agent interaction recordings for evaluations to assist with training and best practices. They opted to implement Aspect® Quality Management™ because of the product's capability to record both voice and screen captures, allowing the company to hear the call, while viewing the activity on the agent's screen. The company is proud to have a high network retention rate due to outstanding provider satisfaction – and quality management plays an extremely significant role in those satisfaction levels. This Aspect Software solution is enhancing the healthcare company's contact center efficiency and productivity to ensure continually high healthcare provider satisfaction, which can potentially positively impact the bottom line.

#### **About PerformanceEdge™**

PerformanceEdge combines workforce management, recording and quality management, performance management, campaign management, and coaching and eLearning to enable organizations to holistically respond to changing business conditions. The PerformanceEdge applications dynamically interoperate to help contact center managers consider everything and act immediately, ultimately making it easier for inbound, outbound and blended contact centers to control costs, enhance service levels and align performance with strategic goals. For more information, visit [www.performanceedgesuite.com](http://www.performanceedgesuite.com).

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