MetricNet's Online Data Submission Portal

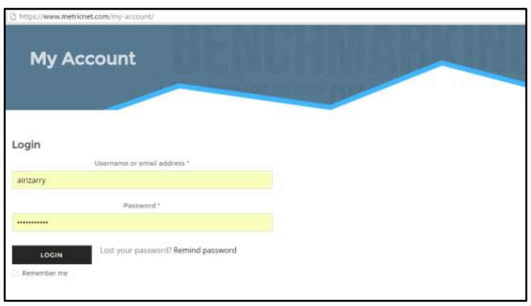
User Guide

1. MetricNet will send an email to the primary contact with login credentials immediately after the project kickoff meeting.

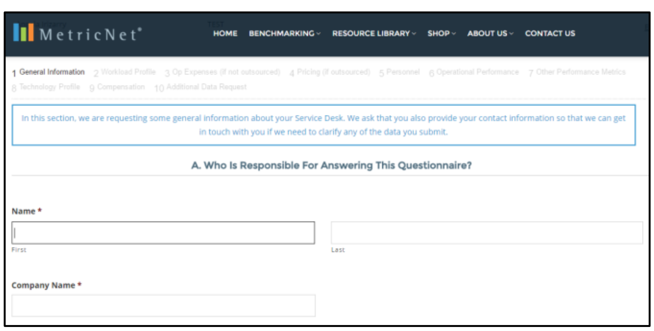
   a. Login credentials will be unique to the service desk, desktop support group or call center being benchmarked. If multiple locations are being separately benchmarked, each location will be provided a unique set of login credentials.

   b. If you do not receive this email within 1 hour of your project kick-off meeting, please notify us at info@metricnet.com.

2. Login to your account at https://www.metricnet.com/my-account



Navigate to the data submission portal at https://www.metricnet.com/data-collection-cc/



4. The data submission portal includes 10 unique sections. Each section should be completed on a best efforts basis before submitting your data.

   a. **Section 1 – General Information:** We are requesting some general information about your Call Center. We ask that you also provide your contact information so that we can get in touch with you if we need to clarify any of the data you submit.

      i. Some fields are required. If a required field is not answered, you will receive a warning that looks like this:

         There was a problem with your submission. Errors have been highlighted below.

         The field that was missed will also be highlighted in red:

         Please Answer Yes or No

         This field is required.

   b. **Section 2 – Contact Profile:** We are requesting that you provide some general information about the contacts handled by your call center. The questionnaire asks for information about both inbound and outbound contacts. This includes contact channels, contact types, and contact volumes for both inbound and outbound contacts. Please note that there are five questions on this worksheet.

   c. **Section 3 – Operational Expenses:** We are requesting that you provide information on the operating expenses for your call center. Ideally, you should provide a full year of cost information. However, if there were unexpected events (e.g., mass hiring and training, or a major change in work responsibilities) that impacted your costs in a negative way over the last year, you may choose to select cost data for a more representative period of time, and annualize it. For example, you might select your cost data for the first three months of 2016, and multiply this by four to get the annual run rate on your operating expenses. Please be sure to match the headcount that is reported on the next tab of the spreadsheet to the cost data you provide. To continue with our example, if you report cost data for the first three months of 2016, the headcount figures that you report on the data collection questionnaire should also be for the first three months of 2016.

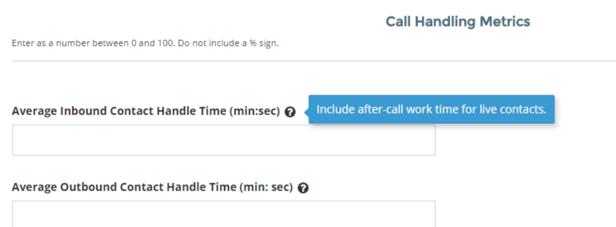
d. **Section 4 – Pricing:** We are requesting that you provide information on the pricing mechanism for outsourced contacts, the amount paid to the outsourcer, and the contact profile for the amount paid (location, languages, contact volumes, etc.)

e. **Section 5 – Personnel:** We are requesting that you provide information on your personnel headcount. Please be sure to report headcount figures corresponding to the period of time for which you reported operating expenses. If headcount fluctuated during this period of time (a common occurrence), please report the average headcount. For example, if reporting expenses for the first quarter of 2016, the headcount reported on this worksheet should also be for the first quarter of 2016.

If you had 25 full time agents during the first month of the quarter, 30 full time agents during the second month of the quarter, and 35 full time agents during the final month of the quarter, the agent headcount you should report would be 30, the average for the quarter. It is also important that you report only full time equivalent (FTE) headcount figures. If you have an agent, for example, that spends half time doing customer service work, and half time doing QA/QC work, you would report 0.5 FTE's in the agent tally, and 0.5 FTE's in the QA/QC tally.

f. **Section 6 - Operational Performance:** We are requesting that you provide information on a number of performance metrics. Please provide average performance levels for each metric. Ideally, you should provide data for a one year period. However, if your performance at any time during the year suffered due to events beyond your control (e.g., a company merger, call center consolidation, etc.), you may report performance averages for a more representative period of time (e.g., the first quarter of 2016).

i. Hover tool tips are provided throughout this section:



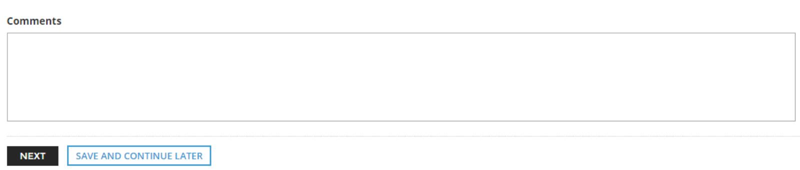
g. **Section 7 – Other Performance Metrics:** We are requesting that you provide information on any additional performance metrics tracked by your call center. These could include other operational metrics not listed on the previous worksheet, or they might include business performance metrics such as loan approval rate, average balance saved in a collections center, or number of new accounts opened. Ideally, you should provide data for a one year period. However, if your performance at any time during the year suffered due to events beyond your control (e.g., a company merger, call center consolidation, etc.), you may report performance averages for a more representative period of time (e.g., the first quarter of 2016).

h. **Section 8 - Technology Profile:** We are requesting information about the technology used by your Call Center.

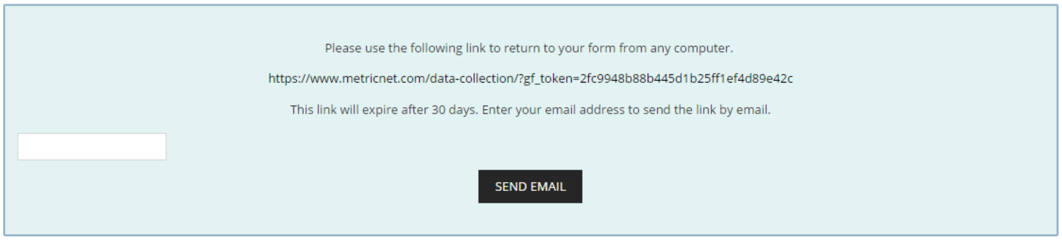
i. **Section 9 – Compensation:** We are requesting that you provide information on how your contact center personnel are compensated. For each job category listed, please provide the average annual base salary, and the average annual bonus and incentive compensation.

j. **Section 10 – Additional Data Request:** Here you can upload additional documentation as attachments. For example: High level work flow diagrams and descriptions in PDF format.

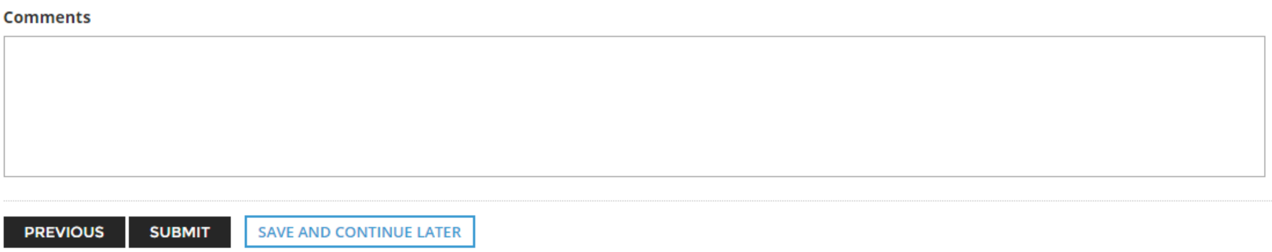
5. At any time, you may save and continue by clicking the save and continue later button at the bottom of the page:



a. You will be provided a unique link to return to the form at a later date. Copy this link and request to have it emailed to you by adding your email to the entry box and clicking the SEND EMAIL button.



6. When each section is completed on a best-efforts basis, please click the SUBMIT button that appears at the bottom of section 10.



7. Once you have completed and submitted the data submission form, please navigate to the Process Assessment at https://www.metricnet.com/process-assessment-cc/