



Company XYZ

Peer Group Contact Center Benchmark



MetricNet™
Performance Benchmarking

Company
XYZ

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Project Overview and Objectives



Project Objectives

- Review and assess the performance of the Company XYZ Contact Center in St. Louis, MO
- Benchmark the performance of the Company XYZ Contact Center against a peer group of comparable Contact Centers
- Conduct a best-practices process assessment
- Recommend strategies for improved performance
- Achieve world-class levels of support
- Maximize customer satisfaction



Project Approach

Module 1: Company XYZ Baselineing / Data Collection

Module 2: Benchmarking and Gap Analysis

Module 3: Balanced Scorecard

Module 4: Best Practices Process Assessment

Module 5: Strategies for Improved Performance

Module 6: Report Development and Presentation of Results



Module 1: Company XYZ Baselineing/Data Collection

■ Core Topics

- ☐ Project Kickoff
- ☐ Data Collection
- ☐ Personnel Interviews



Project Kickoff Meeting

Key Objectives: Project Kickoff Meeting

- Introduce the MetricNet and Company XYZ project teams
- Discuss the project schedule
- Discuss the data collection process
- Answer questions about the project



Data Collection

MetricNet Contact Center Benchmark Data Collection Questionnaire v3.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Developer Help Tell me what you want to do

F11

	A	B	C	D	E	F	G	H	I	J	K	L
1	Instructions		Operational Performance									
2	In this section, we are requesting information on a number of performance metrics. Please provide average performance levels for each metric.											
3	Ideally, you should provide data for a one-year period. However, if your performance during part of the year suffered due to events beyond your											
4	control (for example, a company merger or a Contact Center consolidation), you may report performance averages for a more representative time											
5	period (for example, the first quarter of 2016).											
6												
7	Please report your Contact Center's average performance for each metric specified below.											
8												
9	Metric Category	Performance Metric	Average Performance Level									
10			Enter percentages as numbers (e.g., 4.7). Do not use the % sign.									
11	Quality	Customer Satisfaction (0 - 100%)	<input type="text"/>									
13		Call Quality (0 - 100%)	<input type="text"/>									
15		Net First Contact Resolution Rate (0 - 100%)	<input type="text"/>									
16	Agent	Annual Agent Turnover (0% - 100+%)	<input type="text"/>									
17		Daily Agent Absenteeism (0 - 100%)	<input type="text"/>									
19		Agent Occupancy (0 - 100%)	<input type="text"/>									
21		Schedule Adherence (0 - 100%)	<input type="text"/>									
23		New Agent Training Hours	<input type="text"/>									
25		Agent Training Hours per year (after new-hire training)	<input type="text"/>									
27		Average Agent Tenure (time on the job) in months	<input type="text"/>									
29	Service Level	Agent Job Satisfaction Rating (0 - 100%)	<input type="text"/>									
31		Average Speed of Answer (seconds)	<input type="text"/>									
32		% of Calls Answered within 30 sec (0 - 100%)	<input type="text"/>									
33		Call Abandonment Rate (0 - 100%)	<input type="text"/>									
35		Percent of Calls Blocked (0 - 100%)	<input type="text"/>									
37												
39												
40												

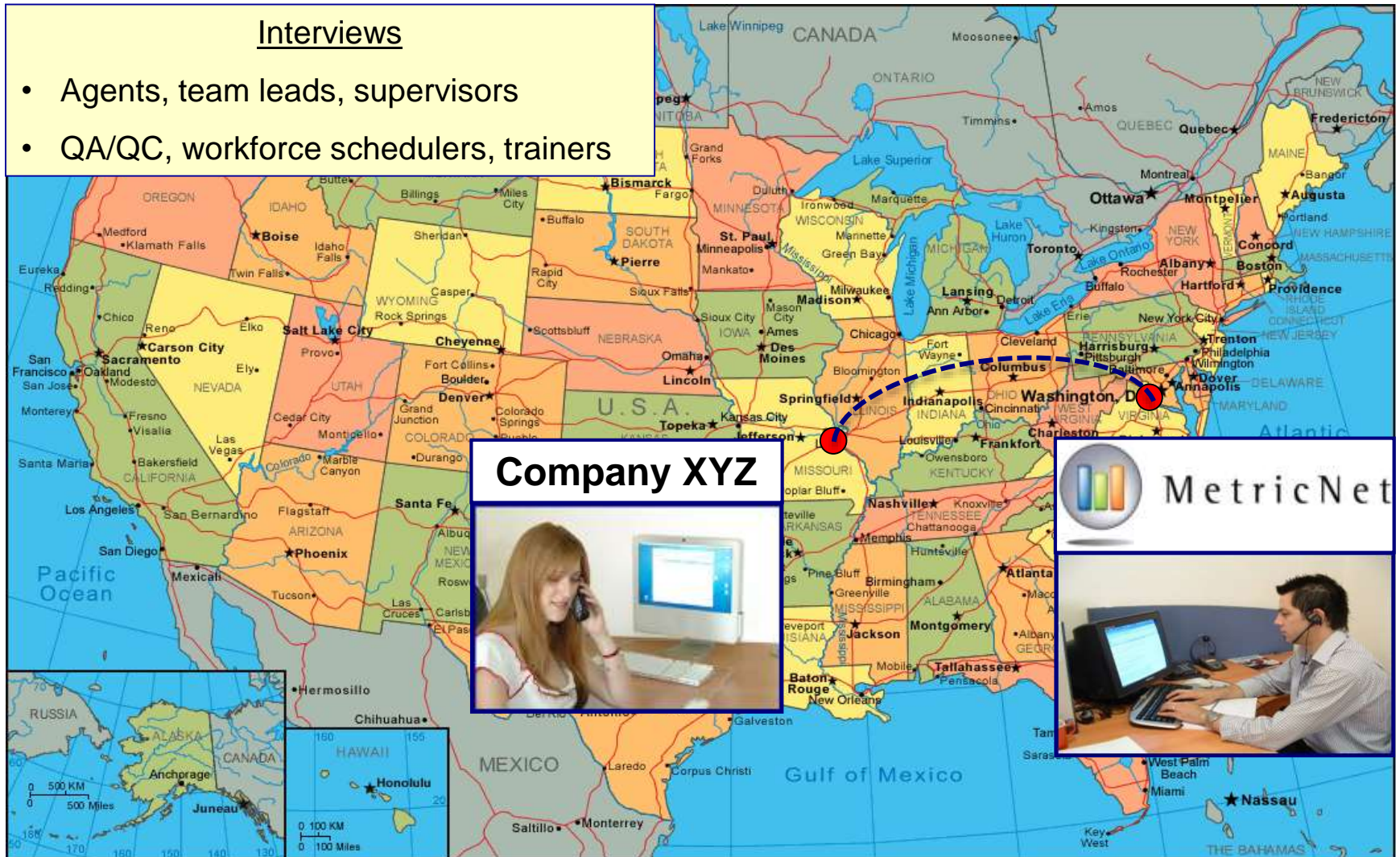
2) Contact Profile 3) Expenses (if not outsourced) 4) Pricing (if outsourced) 5) Personnel 6) Operational Performance 7) Other Metrics ... (+)



Personnel Interviews

Interviews

- Agents, team leads, supervisors
- QA/QC, workforce schedulers, trainers

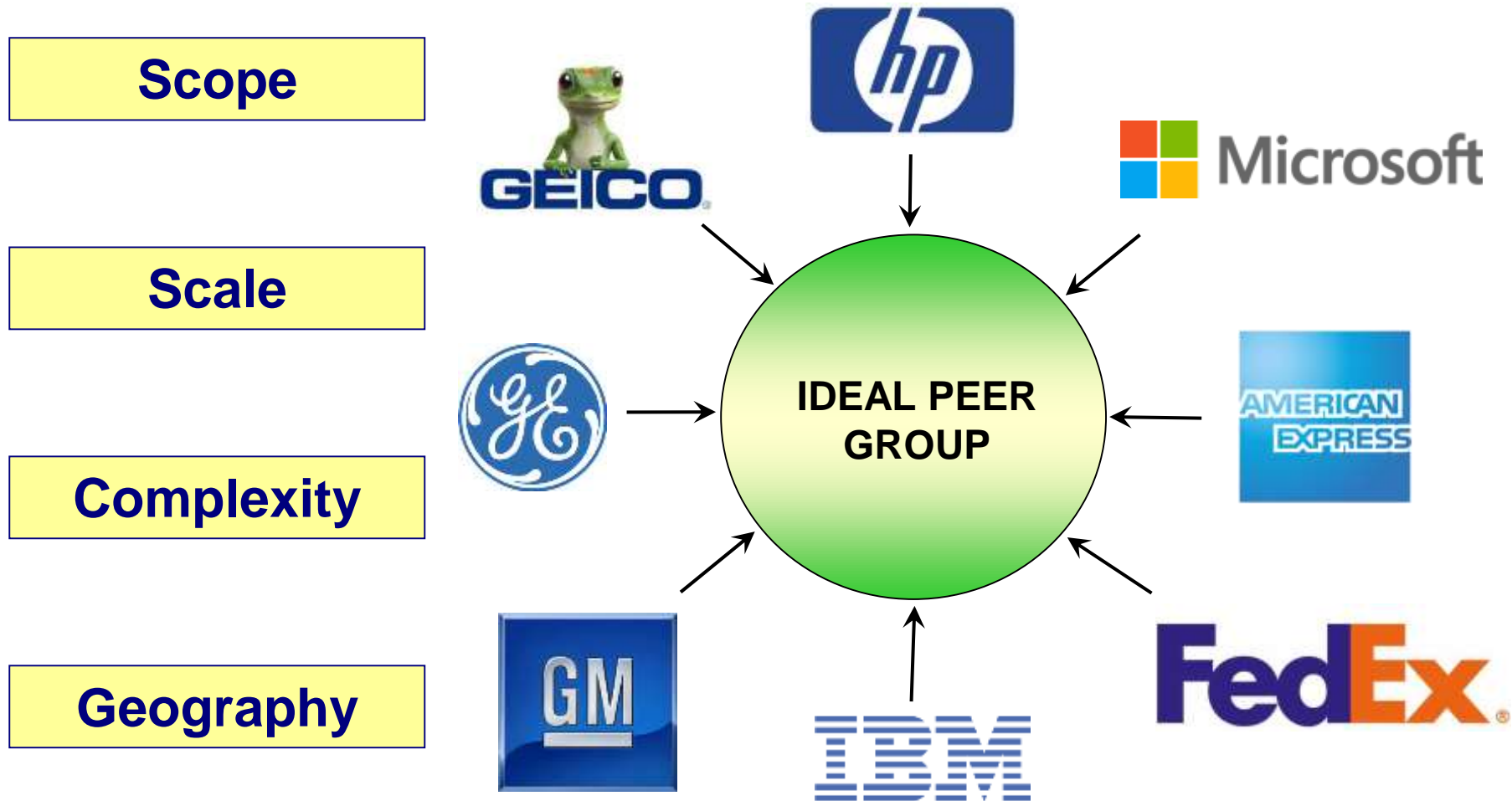


Module 2: Benchmarking and Gap Analysis

- Core Topics
 - Peer Group Selection
 - Benchmarking Comparison
 - Gap Analysis



Benchmarking Peer Group Selection



Read MetricNet's whitepaper on *Benchmarking Peer Group Selection*. Go to www.metricnet.com to get your copy!



Dynamic Peer Group Selection

Scope

Scope refers to the services offered by the Contact Center. The broader the scope of services offered, the broader the skill set required by the agents. As scope increases, so too does the cost of providing those services. The Contact Centers selected for comparison must be comparable in the scope of services offered.

Scale

Volume refers to the number of contacts handled by the Contact Center. Virtually everything in the Contact Center is subject to scale economies. This is particularly true when it comes to the volume of contacts handled. The approximate scale effect for volume is 5%. What this means is that every time the number of transactions doubles, you should expect to see the Cost per Contact decline by 5%. For this reason, it is important to select peer groups that are similar in scale.

Complexity

The complexity of transactions handled will influence the handle time, and hence the cost per transaction. For example, an address change is a simple transaction that takes very little time, and costs very little to resolve. By contrast, an inquiry for a complex issue such as a lost or stolen card resulting in unauthorized charges takes much longer and costs much more to resolve. MetricNet uses a proprietary algorithm to determine a weighted complexity index based upon the mix of transactions handled by a Contact Center. The companies chosen for a peer group will have similar complexity factors.

Geography

The main factor that is affected by geography is cost; specifically labor cost. Since labor accounts for 65% of Contact Center operating expense, it is important to compare performance with Contact Centers that have a common geography. Even within a particular geography, wage rates can differ significantly, so MetricNet makes adjustments to ensure that each Contact Center in a peer group is normalized to the same wage rate.



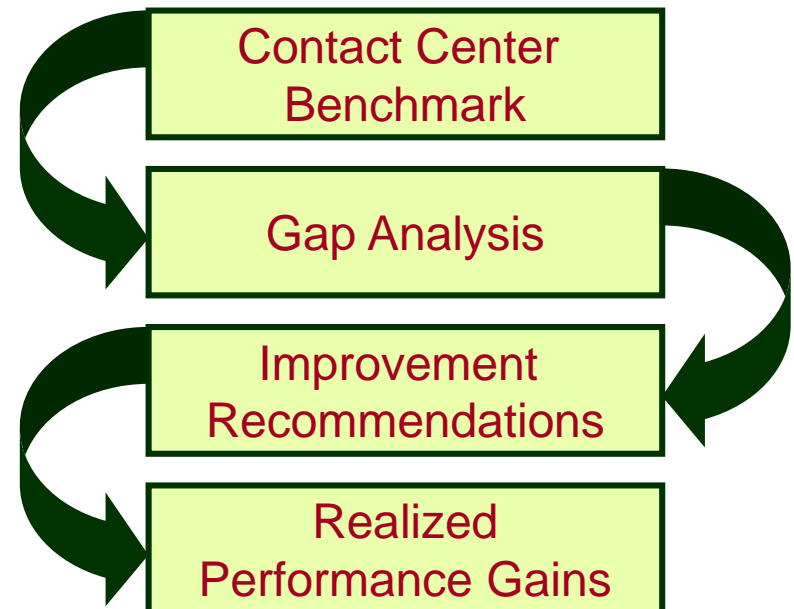
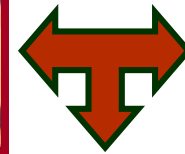
Contact Center Benchmark: Key Questions Answered

Key Questions

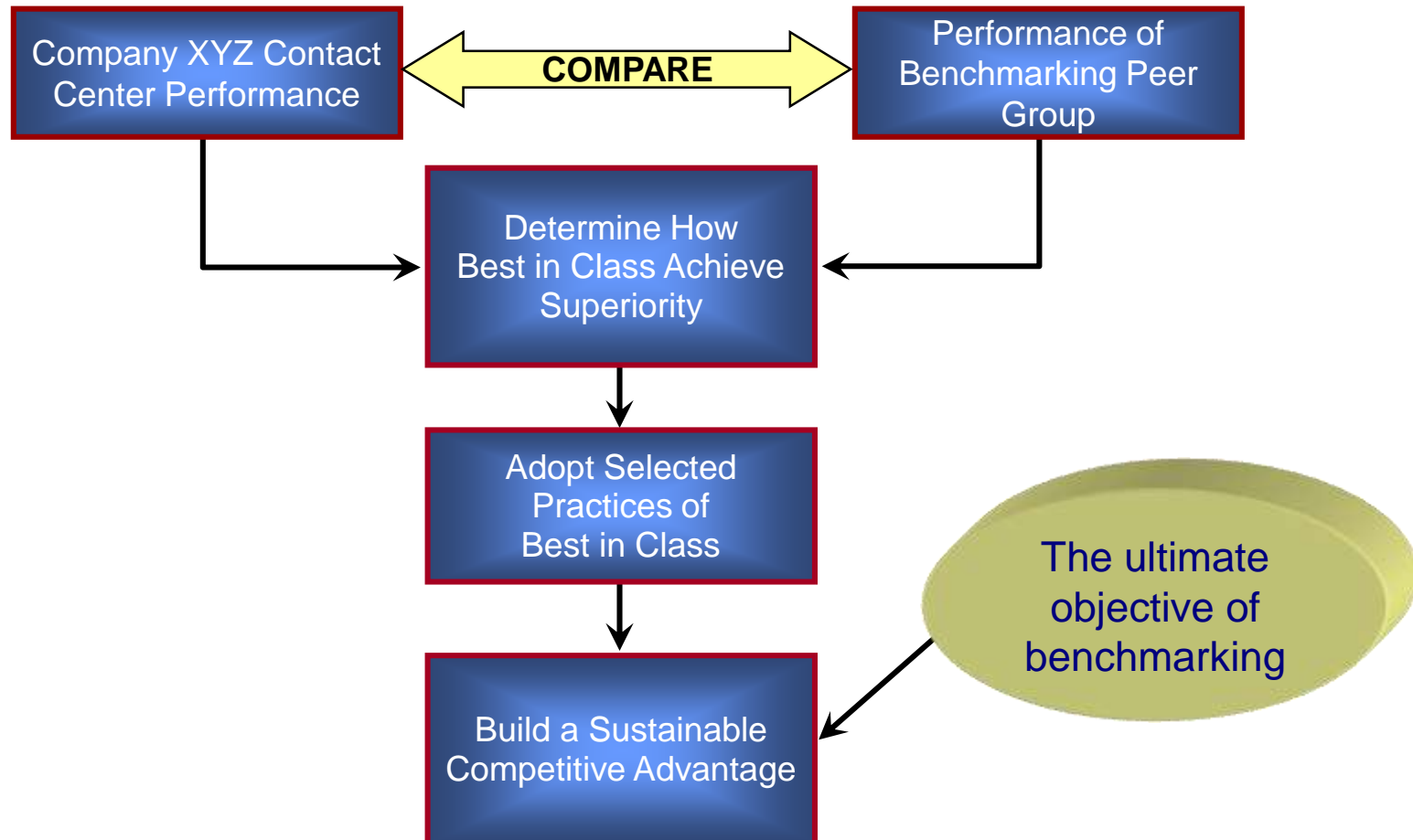
- How is your Contact Center performing?
- How does your Contact Center compare to other comparable Contact Centers?
- What are the strengths and weaknesses of your Contact Center?
- What are the areas of improvement for your Contact Center?
- How can you enhance Contact Center performance and achieve world-class status?

MetricNet's Database of
Process and
Performance Indicators

Company XYZ
Contact Center Data



The Benchmarking Methodology



Read MetricNet's whitepaper on ***Benchmarking Defined***. Go to www.metricnet.com to receive your copy!



Summary of Included Benchmarking Metrics

Cost

- ☐ Cost per Inbound Contact
- ☐ Cost per Minute of Inbound Handle Time

Productivity

- ☐ Inbound Contacts per Agent per Month
- ☐ Outbound Contacts per Agent per Month
- ☐ Agent Utilization
- ☐ Agent as a % of Total Headcount

Service Level

- ☐ Average Speed of Answer (ASA)
- ☐ % of Calls Answered in 30 Seconds
- ☐ Call Abandonment Rate

Quality

- ☐ Call Quality
- ☐ Net First Contact Resolution Rate
- ☐ Customer Satisfaction

Agent

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

Contact Handling

- ☐ Inbound Contact Handle Time
- ☐ Outbound Contact Handle Time
- ☐ Outbound Contacts as a % of Total Contacts
- ☐ IVR Containment Rate

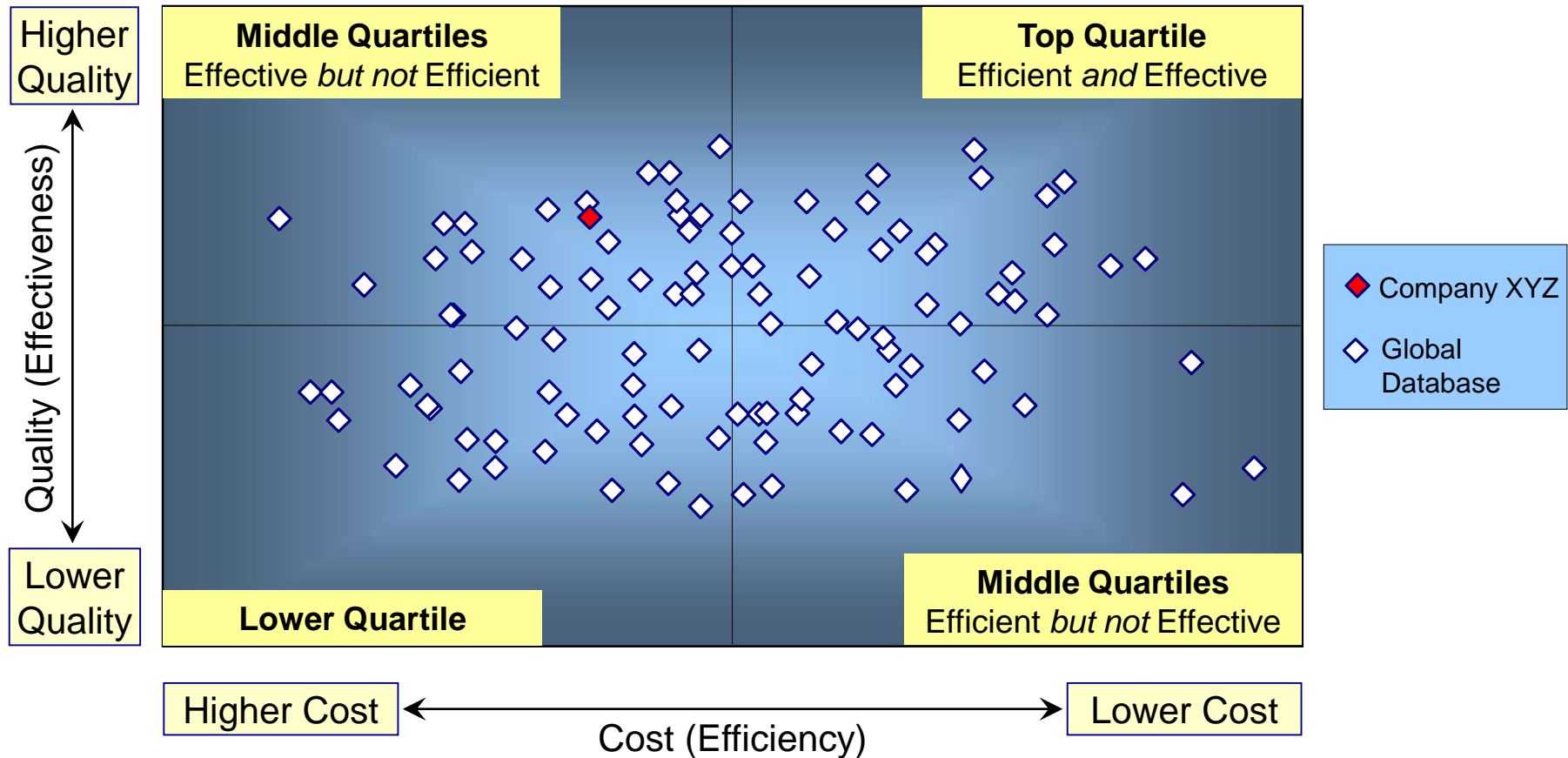


Benchmarking KPI Performance Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Group Statistics			
			Average	Min	Median	Max
Cost	Cost per Inbound Contact	\$12.23	\$9.97	\$6.86	\$9.58	\$15.99
	Cost per Minute of Inbound Handle Time	\$1.66	\$1.39	\$0.95	\$1.41	\$1.95
Productivity	Inbound Contacts per Agent per Month	641	680	434	685	880
	Outbound Contacts per Agent per Month	29	69	24	69	155
	Agent Utilization	49.6%	51.2%	37.7%	50.2%	64.0%
	Agents as a % of Total Headcount	75.5%	76.8%	68.4%	75.7%	87.3%
Service Level	Average Speed of Answer (seconds)	62	57	6	41	151
	% of Calls Answered in 30 Seconds	59.8%	58.0%	13.4%	58.2%	92.2%
	Call Abandonment Rate	6.9%	8.4%	0.7%	6.2%	25.6%
Quality	Call Quality	85.4%	84.8%	71.5%	84.8%	95.3%
	Net First Contact Resolution Rate	71.2%	66.8%	55.9%	66.5%	78.9%
	Customer Satisfaction	83.3%	77.4%	67.9%	77.3%	91.3%
Agent	Annual Agent Turnover	32.6%	40.6%	26.7%	38.2%	69.6%
	Daily Agent Absenteeism	6.2%	11.1%	4.6%	10.9%	19.1%
	Agent Occupancy	80.8%	74.6%	55.1%	76.1%	88.7%
	Schedule Adherence	89.5%	86.0%	77.0%	86.3%	96.1%
	New Agent Training Hours	120	214	120	202	332
	Annual Agent Training Hours	64	42	0	47	90
	Agent Tenure (months)	43.3	30.4	9.5	31.3	43.3
	Agent Job Satisfaction	84.2%	75.4%	61.8%	75.5%	85.1%
Contact Handling	Inbound Contact Handle Time (minutes)	7.35	7.07	5.59	7.03	8.54
	Outbound Contact Handle Time (minutes)	3.20	2.97	2.21	3.05	3.52
	Outbound Contacts as a % of Total Contacts	4.3%	9.3%	3.6%	9.5%	18.6%
	IVR Containment Rate	18.7%	28.3%	0.0%	25.4%	60.5%



Cost vs. Quality for Company XYZ Contact Center



Module 3: Balanced Scorecard

- Core Topics
 - Metrics Selection
 - Metric Weightings
 - Scorecard Construction



Company XYZ Contact Center Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	\$15.99	\$6.86	\$12.23	41.1%	10.3%
Customer Satisfaction	25.0%	67.9%	91.3%	83.3%	65.8%	16.5%
Agent Utilization	15.0%	37.7%	64.0%	49.6%	45.1%	6.8%
Net First Contact Resolution Rate	15.0%	55.9%	78.9%	71.2%	66.7%	10.0%
Agent Job Satisfaction	10.0%	61.8%	85.1%	84.2%	96.4%	9.6%
Average Speed of Answer (seconds)	10.0%	151	6	62	61.5%	6.2%
Total	100.0%	N/A	N/A	N/A	N/A	59.3%

Step 1

Six critical performance metrics have been selected for the scorecard.

Step 3

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

Step 5

Your score for each metric is then calculated:

$$(\text{worst case} - \text{actual performance}) \div (\text{worst case} - \text{best case}) \times 100$$

Step 2

Each metric has been weighted according to its relative importance.

Step 4

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

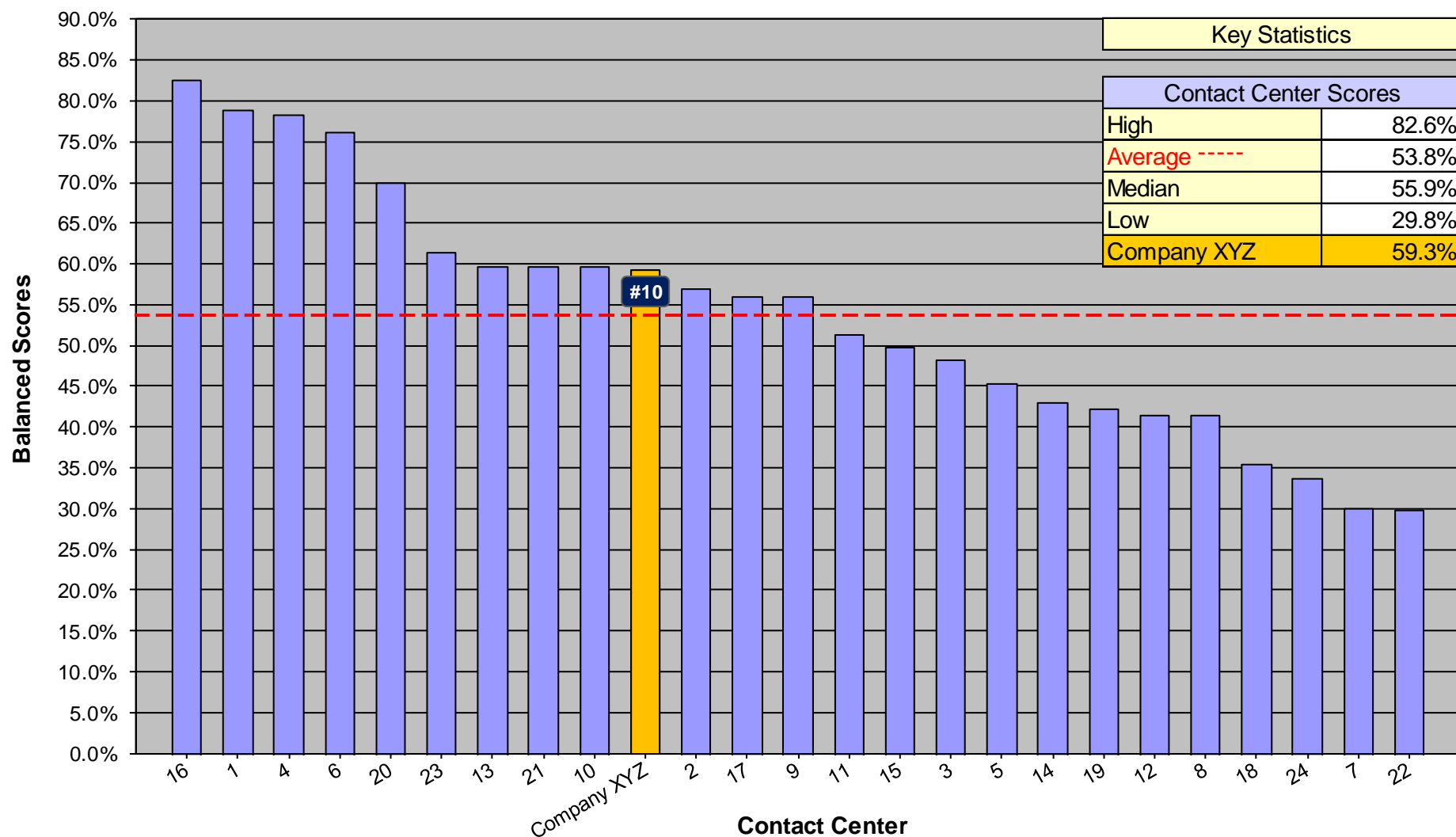
Step 6

Your balanced score for each metric is calculated:

$$\text{metric score} \times \text{weighting}$$



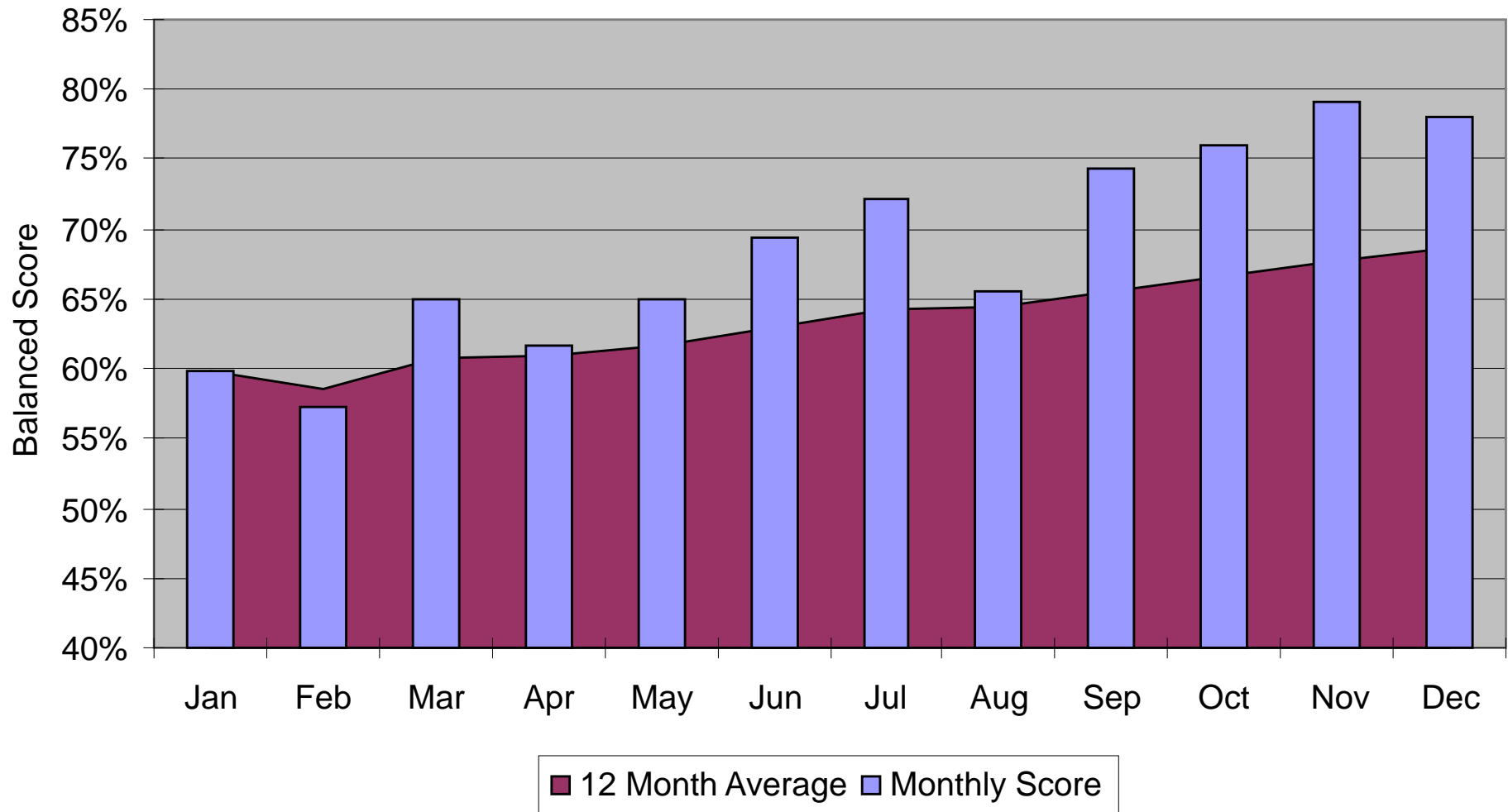
Balanced Scorecard Summary



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



The Scorecard Can be Updated Monthly

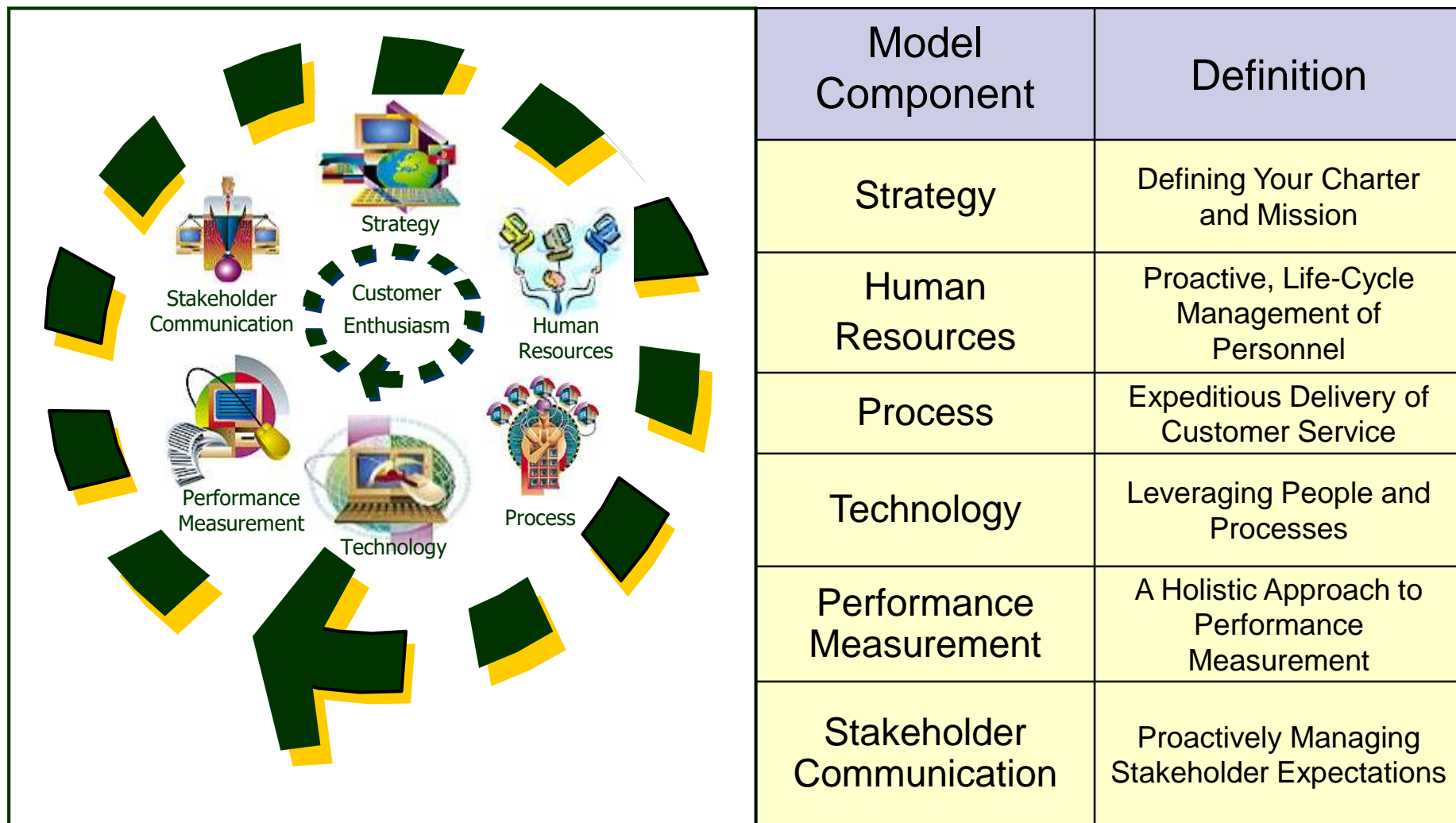


Module 4: Best Practices Process Assessment

- Core Components
 - Company XYZ Self-Assessment
 - MetricNet Maturity Ranking
 - Process Assessment Rollup



Six-Part Model for Contact Center Best Practices



Best Practices Evaluation Criteria

Ranking	Explanation
1	No Knowledge of the Best Practice.
2	Aware of the Best Practice, but not applying it.
3	Aware of the Best Practice, and applying at a rudimentary level.
4	Best Practice is being effectively applied.
5	Best Practice is being applied in a world-class fashion.

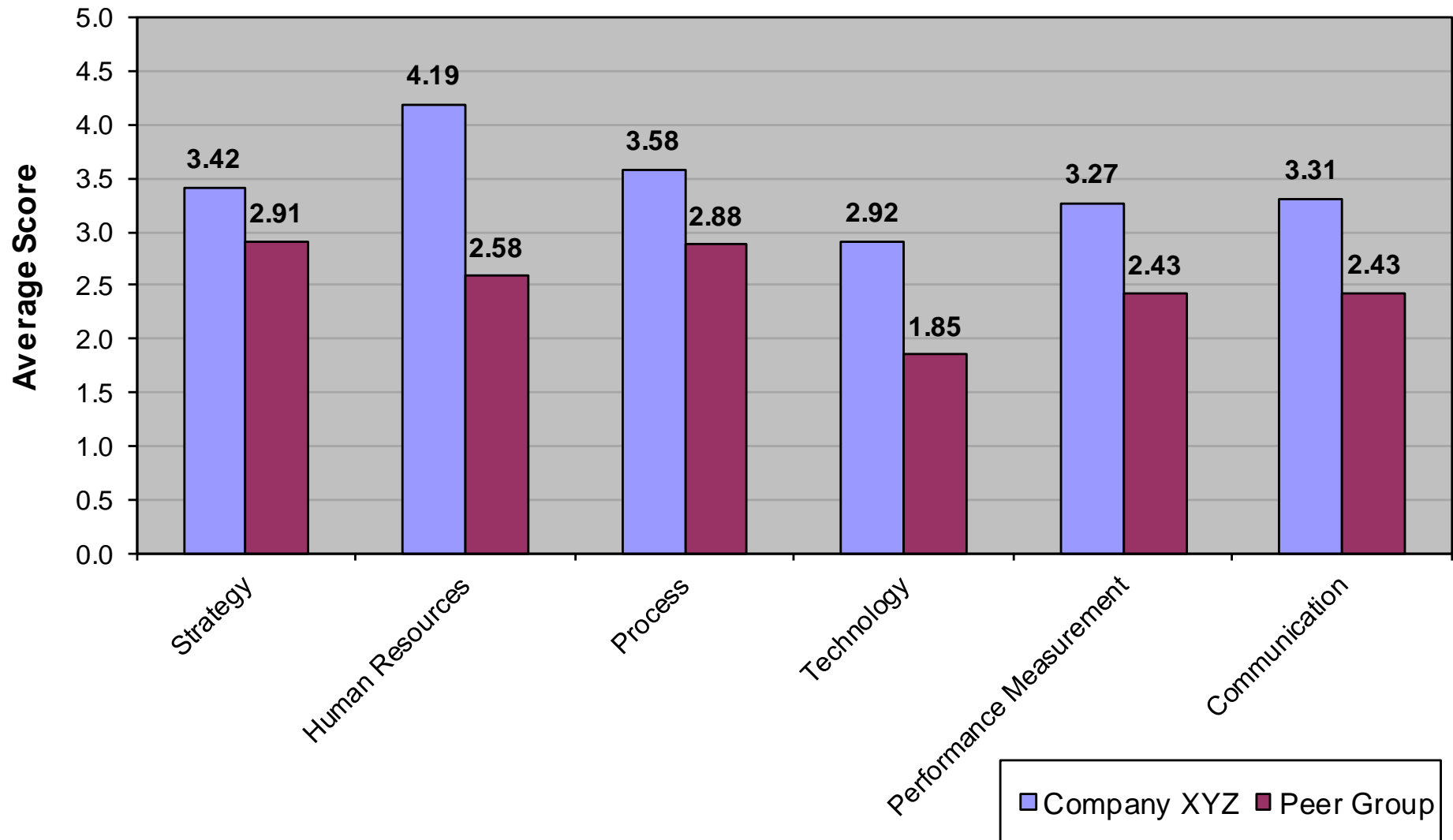


Company XYZ Process Self-Assessment

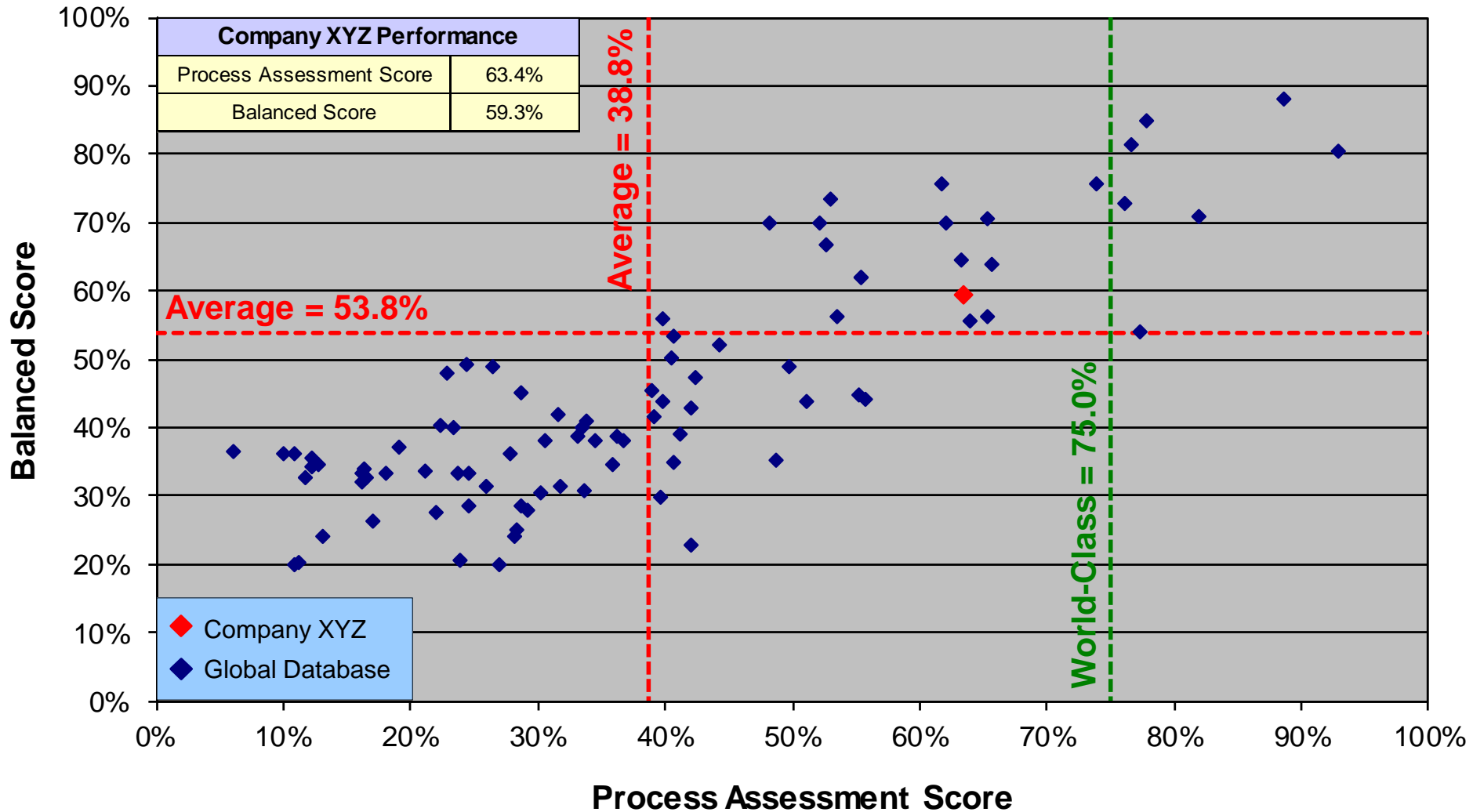
Best Practice	Strategy Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Contact Center has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	4.0	3.27
2	The Contact Center has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	4.0	2.79
3	The Contact Center is well integrated into the company value chain. The Contact Center acts as the "voice of the customer," and is involved in product decisions and deliberations that affect customers. The Contact Center is alerted ahead of time so that they can prepare for major product changes and marketing campaigns.	3.5	3.02
4	The Contact Center has SLA's that define the level of service to be delivered to customers. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0	3.43
5	The Contact Center has OLA's (Operating Level Agreements) with other support groups in the organization (information technology, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	2.0	1.88
6	The Contact Center actively seeks to improve First Contact Resolution Rates, Level 0 Resolution Rates (Customer Self-Help), and Level -1 (Contact Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these objectives.	3.0	3.05
Summary Statistics		Total Score	20.50
		Average Score	3.42
			2.91



Best Practices Process Self-Assessment Summary



Process Maturity vs. Scorecard Performance



Module 5: Strategies for Improved Performance

- Core Components
 - Conclusions and Recommendations
 - Roadmap for World-Class Performance

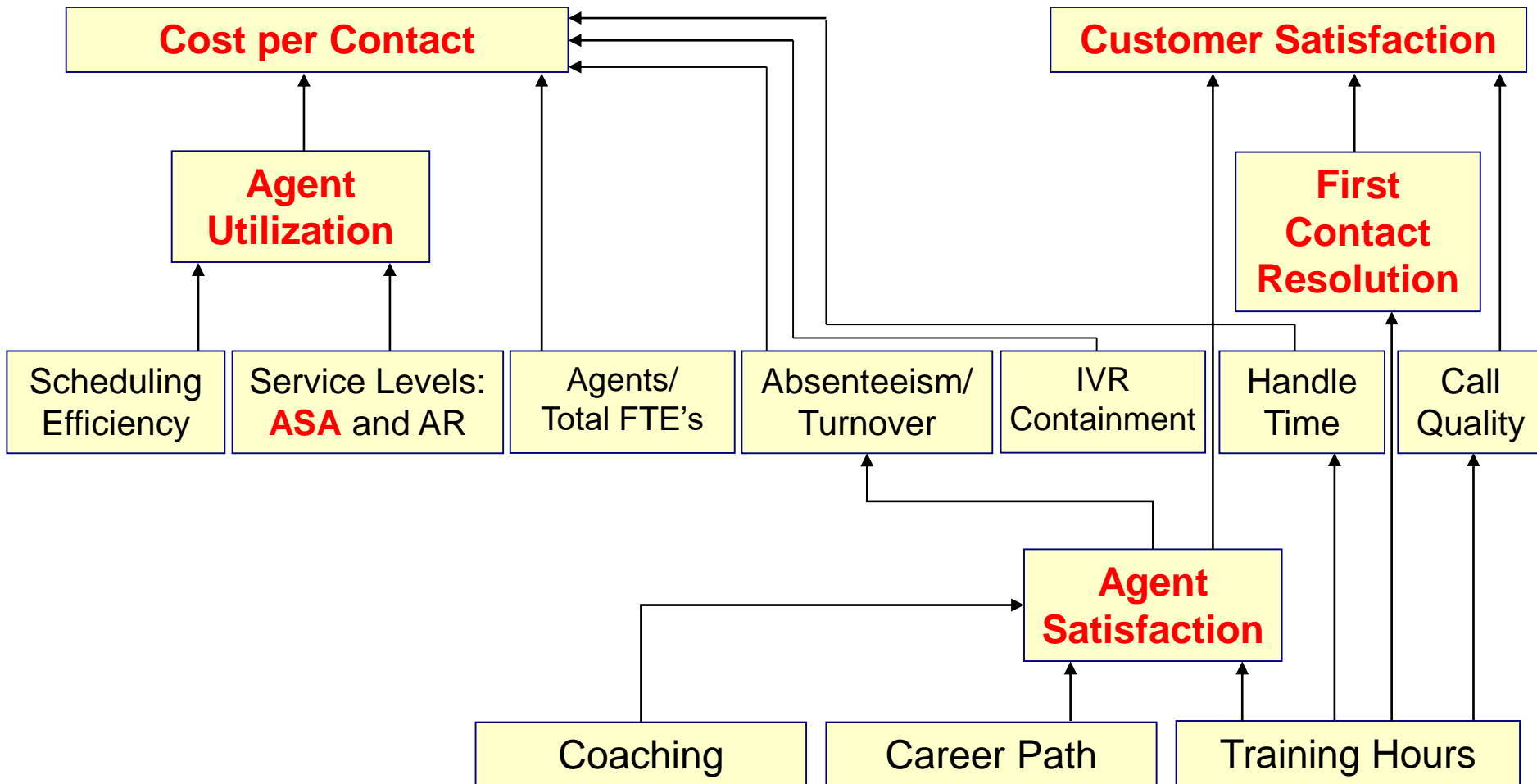


Conclusions and Recommendations

- Conclusions and Recommendations fall into six categories
 1. Strategy
 2. Human Resource Management
 3. Call Handling Processes and Procedures
 4. Technology
 5. Performance Measurement and Management
 6. Stakeholder Communication



Contact Center KPI Correlations Drive Conclusions



Performance Targets Will be Established

Performance Metric	Current Company XYZ Performance	Target Performance
Agent Utilization	49.6%	55.0%
Cost per Inbound Contact	\$12.23	\$11.58
Cost per Minute of Inbound Handle Time	\$1.66	\$1.58
Inbound Contacts per Agent per Month	641	705
Outbound Contacts per Agent per Month	29	32
Average Speed of Answer (seconds)	62	70
Call Abandonment Rate	6.9%	8.0%
IVR Containment Rate	18.7%	30.0%
Balanced Score	59.3%	63.6%

Achieving the performance targets recommended above would increase the Company XYZ Contact Center Balanced Score from 59.3% to 63.6%, and would elevate Company XYZ from 10th place to 6th place (top quartile!) on the Balanced Scorecard.



Module 6: Report Development and Presentation of Results

- Core Topics
 - Report Development
 - Presentation of Benchmarking Results



Write Benchmarking Report



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- Benchmark Overview and Objectives Page 4
- Industry Background Page 15
- Performance Benchmarking Summary Page 23

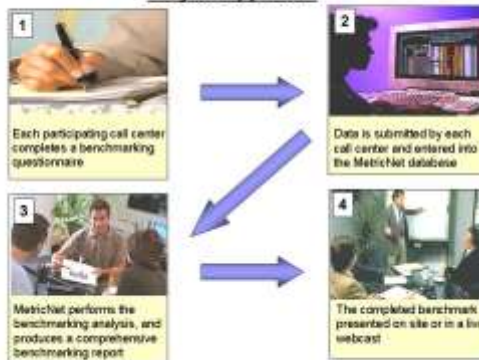
The Benchmarking Methodology



XYZ Insurance Call Center Overview

Call Center Location	WY 100
Hours of Operation	8:00 am - 7:00 pm, Monday through Friday 8:30 am - 5:00 pm Saturday 10:00 am - 4:00 pm Sunday
Annual Operating Budget	\$2,307,900
Monthly Contact Volume	Voice: 70,000 Email: 0 Fax: 0

Project Approach



Building a Service-Based Competitive Advantage!

A Fundamental Shift

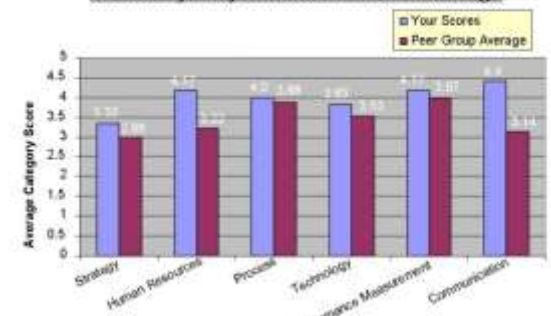
OLD PARADIGM

- Call center is a function
- Customer contact necessary
- Supplement books & mail
- Play catch up customer expectations
- Goal is customer satisfaction

The World-Class Call Center Defined



Summary: Key Success Factor Rankings



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Presentation of Results

MetricNet will present the results of the benchmark in a live GoToMeeting.



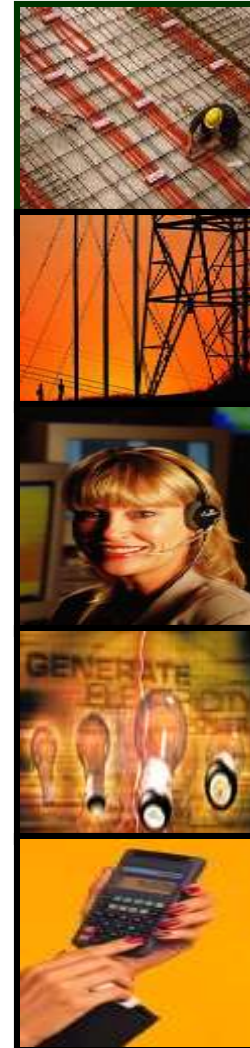
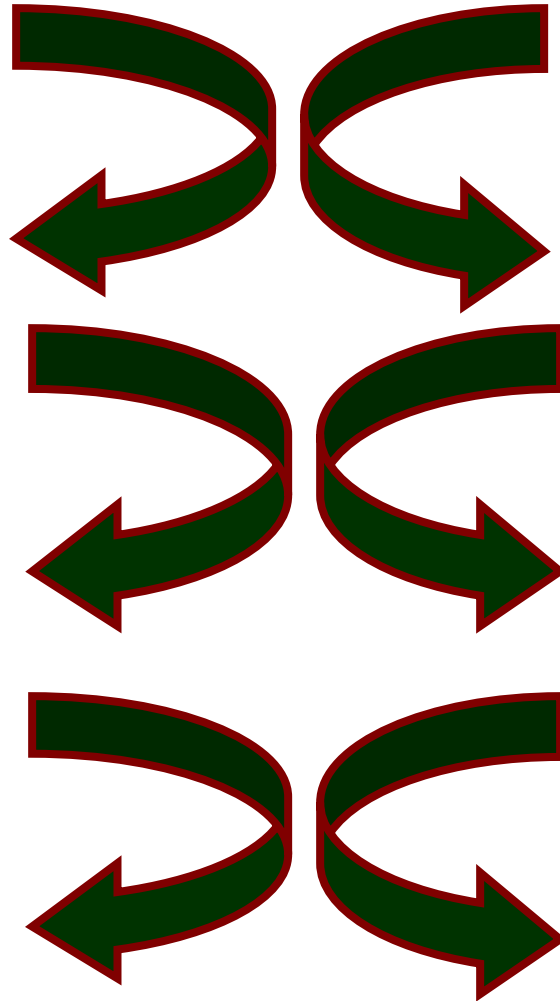


Industry Background



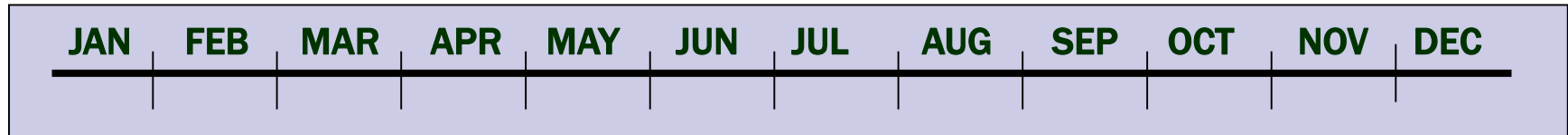
An Industry in Transition

**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!



8760 Hours

- 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

Customer Contact



7 - 22 minutes/yr.

Moment of Truth Opportunity!

Building a Service-Based Competitive Advantage!

A Fundamental Shift

OLD PARADIGM

- Contact 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

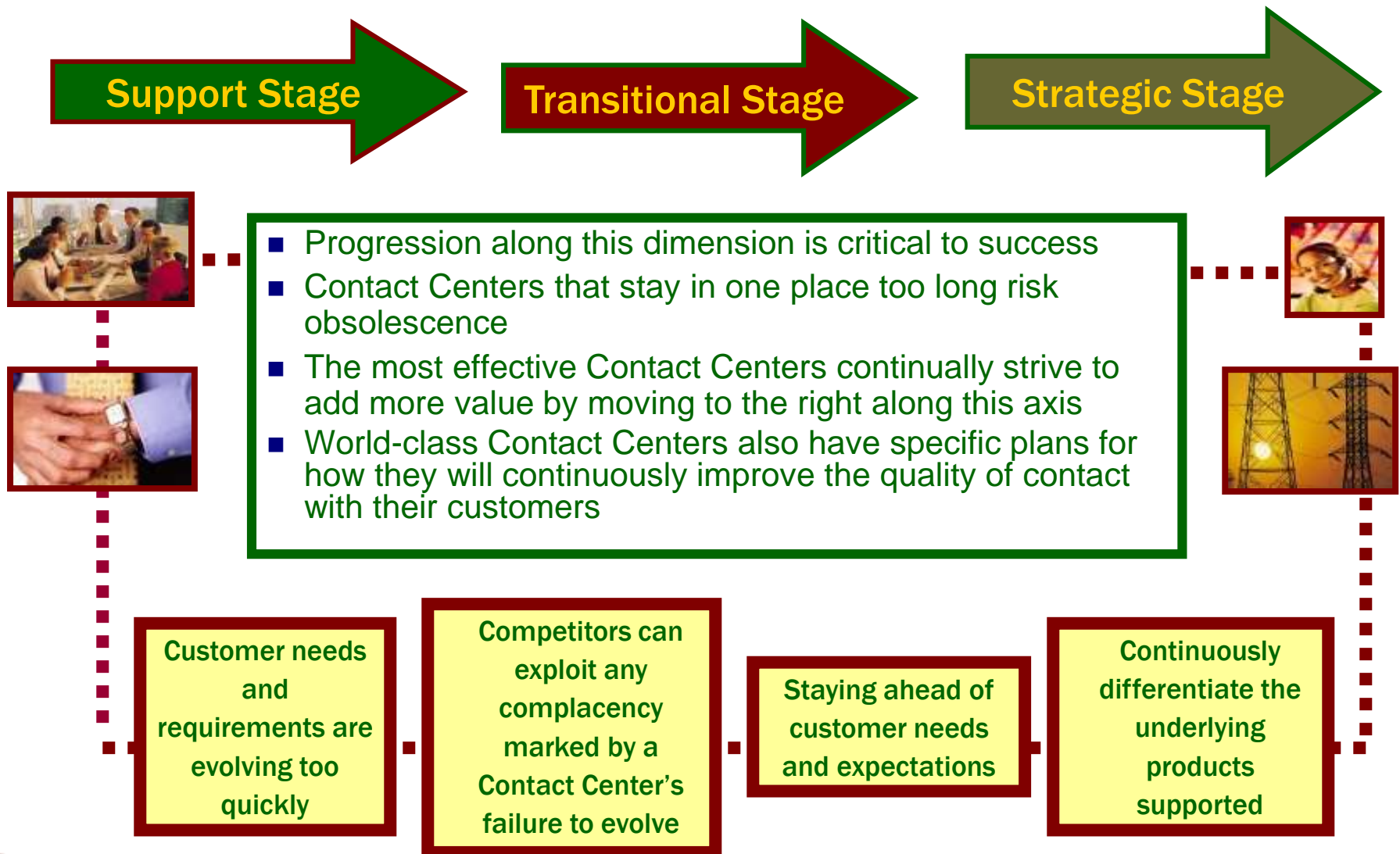


NEW PARADIGM

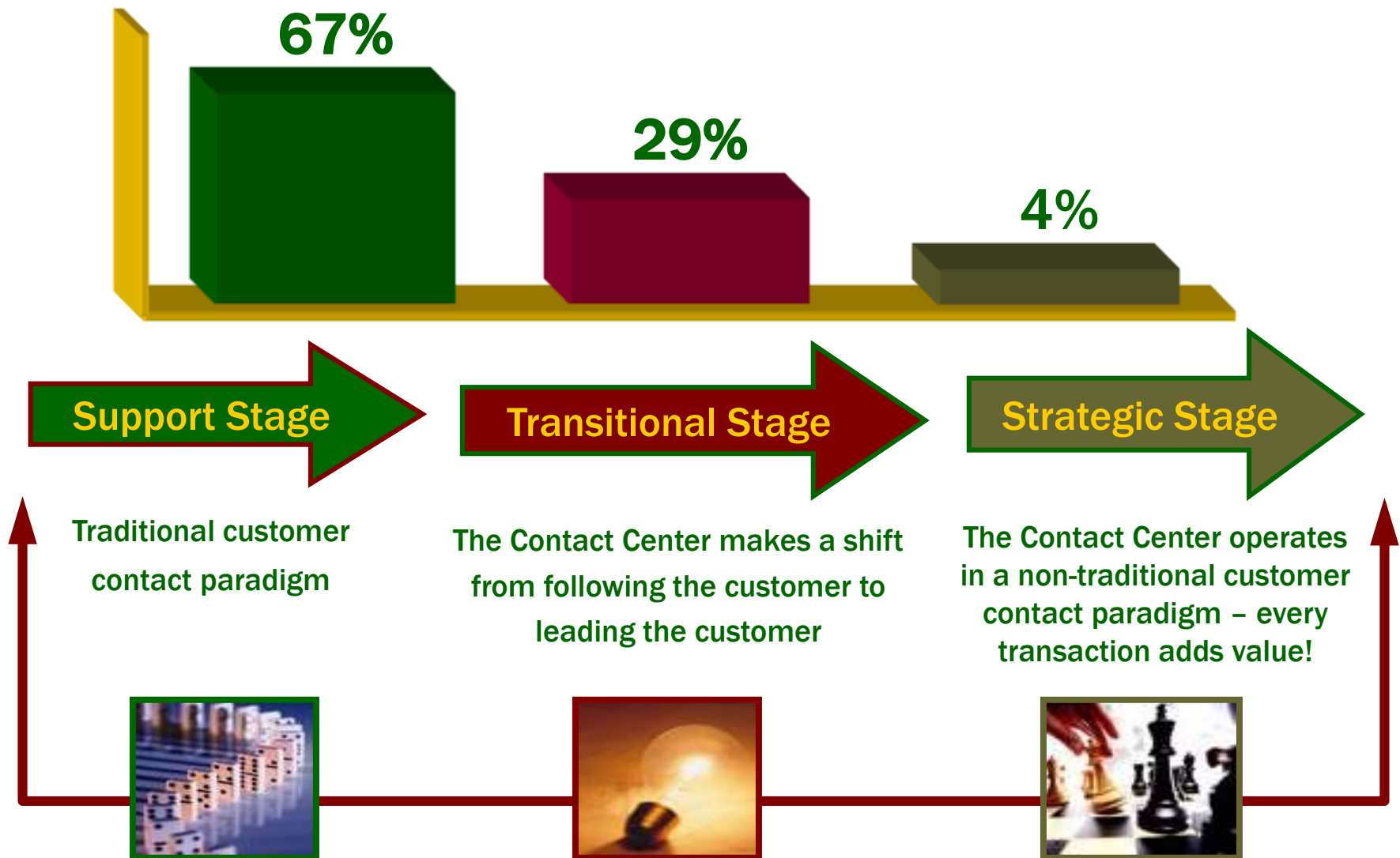
- Contact Center is a source of value creation
- Customer contact is a company and product differentiator
- Replacement for traditional bricks & mortar facilities
- Stay ahead of customer needs and expectations – proactive!
- Goal is customer *enthusiasm*, product *differentiation*, and customer *aggregation*



Contact Centers Must Evolve to Survive



How Far Has Your Contact Center Evolved?

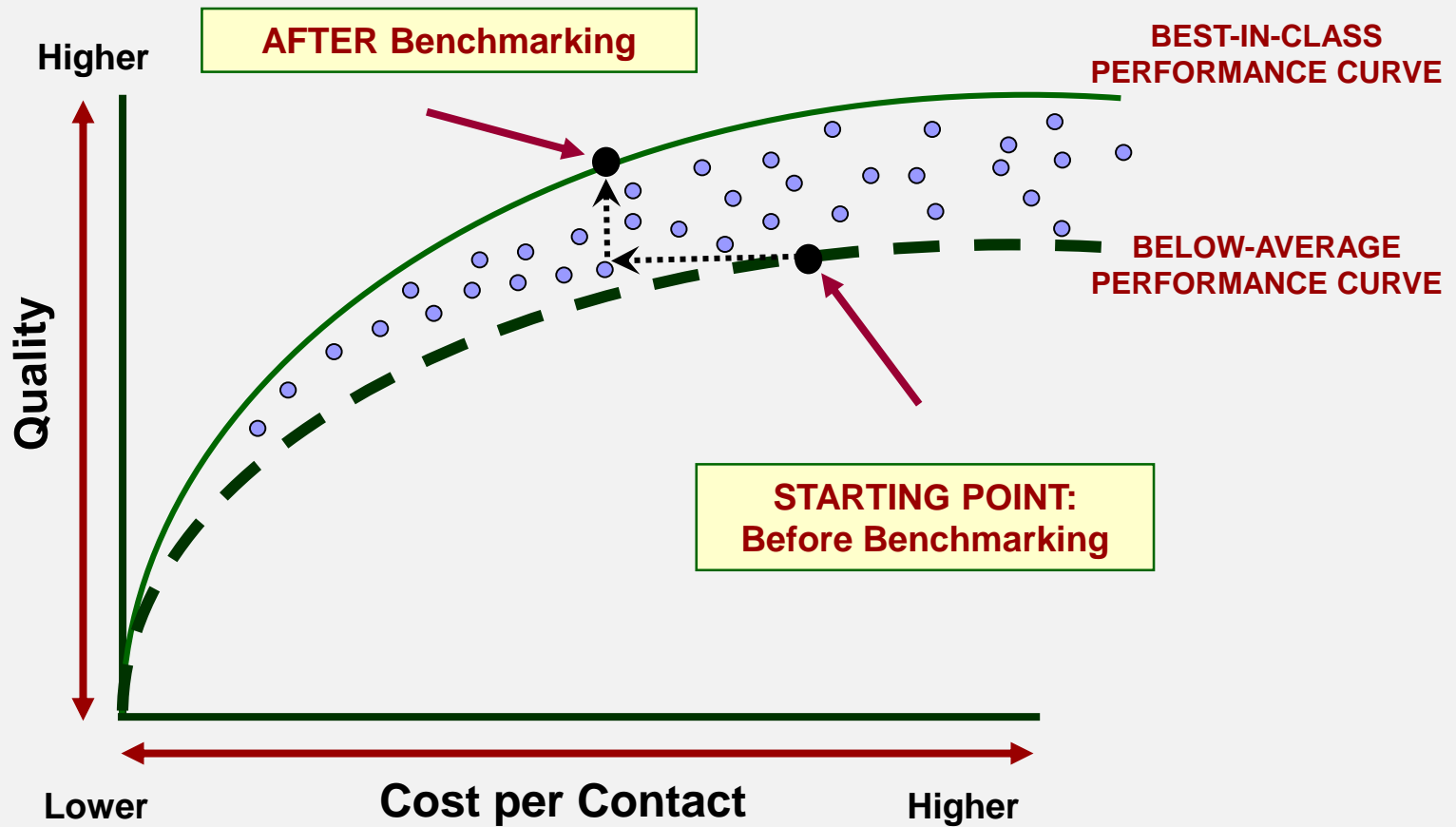


Characteristics of a World-Class Contact Center

- Contact 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
- Contact Center follows industry best practices
 - Industry best practices are defined and documented
 - Contact Center follows industry best practices
- Every transaction adds value
 - A positive customer experience
 - Improves customer loyalty
 - Creates positive brand awareness and switching costs



The Goal of Benchmarking





Performance Benchmarking Summary



Company XYZ Contact Center Overview

Contact Center Location(s)		St. Louis, MO	
Hours of Operation		7 AM – 10 PM, 7 days/week	
Data Time Period		January 2017 – December 2017	
Annual Operating Expense		\$10,304,235	
Monthly Inbound Contact Volume	Voice	37,243	
	Email	17,501	
	Chat	14,988	
	Other	455	
	Total	70,187	
Monthly Outbound Contact Volume		3,169	
FTE Personnel Headcount		Technology Profile	
Agent Level 1	90.0	Customer Information System (CIS)	IBM Initiate Master Data Svc
Agent Level 2	19.5	Automatic Call Distributor (ACD)	Avaya Aura Contact Center
Supervisor/Team Lead	16.0	Interactive Voice Response (IVR) System	Avaya Aura Contact Center
Manager	3.0	Workforce Management/Scheduling	cc-Modeler Professional
QA/QC	9.5	Call Quality	Verint
Training	5.0		
Workforce Scheduling	2.0		
Total	145.0		



Summary of Included Benchmarking Metrics

Cost

- ☐ Cost per Inbound Contact
- ☐ Cost per Minute of Inbound Handle Time

Productivity

- ☐ Inbound Contacts per Agent per Month
- ☐ Outbound Contacts per Agent per Month
- ☐ Agent Utilization
- ☐ Agent as a % of Total Headcount

Service Level

- ☐ Average Speed of Answer (ASA)
- ☐ % of Calls Answered in 30 Seconds
- ☐ Call Abandonment Rate

Quality

- ☐ Call Quality
- ☐ Net First Contact Resolution Rate
- ☐ Customer Satisfaction

Agent

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

Contact Handling

- ☐ Inbound Contact Handle Time
- ☐ Outbound Contact Handle Time
- ☐ Outbound Contacts as a % of Total Contacts
- ☐ IVR Containment Rate



Benchmarking KPI Performance Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Group Statistics			
			Average	Min	Median	Max
Cost	Cost per Inbound Contact	\$12.23	\$9.97	\$6.86	\$9.58	\$15.99
	Cost per Minute of Inbound Handle Time	\$1.66	\$1.39	\$0.95	\$1.41	\$1.95
Productivity	Inbound Contacts per Agent per Month	641	680	434	685	880
	Outbound Contacts per Agent per Month	29	69	24	69	155
	Agent Utilization	49.6%	51.2%	37.7%	50.2%	64.0%
	Agents as a % of Total Headcount	75.5%	76.8%	68.4%	75.7%	87.3%
Service Level	Average Speed of Answer (seconds)	62	57	6	41	151
	% of Calls Answered in 30 Seconds	59.8%	58.0%	13.4%	58.2%	92.2%
	Call Abandonment Rate	6.9%	8.4%	0.7%	6.2%	25.6%
Quality	Call Quality	85.4%	84.8%	71.5%	84.8%	95.3%
	Net First Contact Resolution Rate	71.2%	66.8%	55.9%	66.5%	78.9%
	Customer Satisfaction	83.3%	77.4%	67.9%	77.3%	91.3%
Agent	Annual Agent Turnover	32.6%	40.6%	26.7%	38.2%	69.6%
	Daily Agent Absenteeism	6.2%	11.1%	4.6%	10.9%	19.1%
	Agent Occupancy	80.8%	74.6%	55.1%	76.1%	88.7%
	Schedule Adherence	89.5%	86.0%	77.0%	86.3%	96.1%
	New Agent Training Hours	120	214	120	202	332
	Annual Agent Training Hours	64	42	0	47	90
	Agent Tenure (months)	43.3	30.4	9.5	31.3	43.3
	Agent Job Satisfaction	84.2%	75.4%	61.8%	75.5%	85.1%
Contact Handling	Inbound Contact Handle Time (minutes)	7.35	7.07	5.59	7.03	8.54
	Outbound Contact Handle Time (minutes)	3.20	2.97	2.21	3.05	3.52
	Outbound Contacts as a % of Total Contacts	4.3%	9.3%	3.6%	9.5%	18.6%
	IVR Containment Rate	18.7%	28.3%	0.0%	25.4%	60.5%



KPI Gap Summary

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Average	Performance Gap
Cost	Cost per Inbound Contact	\$12.23	\$9.97	-22.7%
	Cost per Minute of Inbound Handle Time	\$1.66	\$1.39	-19.1%
Productivity	Inbound Contacts per Agent per Month	641	680	-5.8%
	Outbound Contacts per Agent per Month	29	69	58.2%
	Agent Utilization	49.6%	51.2%	-3.3%
	Agents as a % of Total Headcount	75.5%	76.8%	-1.7%
Service Level	Average Speed of Answer (seconds)	62	57	-8.6%
	% of Calls Answered in 30 Seconds	59.8%	58.0%	3.2%
	Call Abandonment Rate	6.9%	8.4%	18.0%
Quality	Call Quality	85.4%	84.8%	0.8%
	Net First Contact Resolution Rate	71.2%	66.8%	6.6%
	Customer Satisfaction	83.3%	77.4%	7.6%
Agent	Annual Agent Turnover	32.6%	40.6%	19.7%
	Daily Agent Absenteeism	6.2%	11.1%	44.2%
	Agent Occupancy	80.8%	74.6%	8.3%
	Schedule Adherence	89.5%	86.0%	4.0%
	New Agent Training Hours	120	214	-44.0%
	Annual Agent Training Hours	64	42	51.5%
	Agent Tenure (months)	43.3	30.4	42.4%
	Agent Job Satisfaction	84.2%	75.4%	11.7%
Contact Handling	Inbound Contact Handle Time (minutes)	7.35	7.07	-3.9%
	Outbound Contact Handle Time (minutes)	3.20	2.97	-7.9%
	Outbound Contacts as a % of Total Contacts	4.3%	9.3%	53.5%
	IVR Containment Rate	18.7%	28.3%	-33.9%



KPI Gap Ranking

Key Performance Indicator (KPI)	Company XYZ	Peer Average	Performance Gap
Outbound Contacts per Agent per Month	29	69	58.2%
Outbound Contacts as a % of Total Contacts	4.3%	9.3%	53.5%
Annual Agent Training Hours	64	42	51.5%
Daily Agent Absenteeism	6.2%	11.1%	44.2%
Agent Tenure (months)	43.3	30.4	42.4%
Annual Agent Turnover	32.6%	40.6%	19.7%
Call Abandonment Rate	6.9%	8.4%	18.0%
Agent Job Satisfaction	84.2%	75.4%	11.7%
Agent Occupancy	80.8%	74.6%	8.3%
Customer Satisfaction	83.3%	77.4%	7.6%
Net First Contact Resolution Rate	71.2%	66.8%	6.6%
Schedule Adherence	89.5%	86.0%	4.0%
% of Calls Answered in 30 Seconds	59.8%	58.0%	3.2%
Call Quality	85.4%	84.8%	0.8%
Agents as a % of Total Headcount	75.5%	76.8%	-1.7%
Agent Utilization	49.6%	51.2%	-3.3%
Inbound Contact Handle Time (minutes)	7.35	7.07	-3.9%
Inbound Contacts per Agent per Month	641	680	-5.8%
Outbound Contact Handle Time (minutes)	3.20	2.97	-7.9%
Average Speed of Answer (seconds)	62	57	-8.6%
Cost per Minute of Inbound Handle Time	\$1.66	\$1.39	-19.1%
Cost per Inbound Contact	\$12.23	\$9.97	-22.7%
IVR Containment Rate	18.7%	28.3%	-33.9%
New Agent Training Hours	120	214	-44.0%



Quartile Rankings: Cost and Productivity Metrics

Cost Metrics	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Cost per Inbound Contact	\$6.86 \$8.81	\$8.81 \$9.58	\$9.58 \$11.04	\$11.04 \$15.99	\$12.23
Cost per Minute of Inbound Handle Time	\$0.95 \$1.18	\$1.18 \$1.41	\$1.41 \$1.59	\$1.59 \$1.95	\$1.66

Productivity Metric	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Inbound Contacts per Agent per Month	880 745	745 685	685 641	641 434	641
Outbound Contacts per Agent per Month	24 49	49 69	69 84	84 155	29
Agent Utilization	64.0% 55.2%	55.2% 50.2%	50.2% 47.3%	47.3% 37.7%	49.6%
Agents as a % of Total Headcount	87.3% 82.4%	82.4% 75.7%	75.7% 72.6%	72.6% 68.4%	75.5%



Quartile Rankings: Service Level and Quality Metrics

Service Level Metric	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Average Speed of Answer (seconds)	6 25	25 41	41 74	74 151	62
% of Calls Answered in 30 Seconds	92.2% 79.2%	79.2% 58.2%	58.2% 41.7%	41.7% 13.4%	59.8%
Call Abandonment Rate	0.7% 2.7%	2.7% 6.2%	6.2% 13.2%	13.2% 25.6%	6.9%

Quality Metric	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Call Quality	95.3% 87.5%	87.5% 84.8%	84.8% 81.8%	81.8% 71.5%	85.4%
Net First Contact Resolution Rate	78.9% 70.4%	70.4% 66.5%	66.5% 63.2%	63.2% 55.9%	71.2%
Customer Satisfaction	91.3% 80.3%	80.3% 77.3%	77.3% 73.6%	73.6% 67.9%	83.3%



Quartile Rankings: Agent Metrics

Agent Metrics	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Annual Agent Turnover	26.7% 32.4%	32.4% 38.2%	38.2% 44.5%	44.5% 69.6%	32.6%
Daily Agent Absenteeism	4.6% 8.9%	8.9% 10.9%	10.9% 14.0%	14.0% 19.1%	6.2%
Agent Occupancy	88.7% 78.6%	78.6% 76.1%	76.1% 69.9%	69.9% 55.1%	80.8%
Schedule Adherence	96.1% 89.5%	89.5% 86.3%	86.3% 82.0%	82.0% 77.0%	89.5%
New Agent Training Hours	332 236	236 202	202 179	179 120	120
Annual Agent Training Hours	90 64	64 47	47 21	21 0	64
Agent Tenure (months)	43.3 35.3	35.3 31.3	31.3 25.9	25.9 9.5	43.3
Agent Job Satisfaction	85.1% 80.4%	80.4% 75.5%	75.5% 71.9%	71.9% 61.8%	84.2%



Quartile Rankings: Contact Handling Metrics

Contact Handling Metric	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Inbound Contact Handle Time (minutes)	5.59 6.56	6.56 7.03	7.03 7.52	7.52 8.54	7.35
Outbound Contact Handle Time (minutes)	2.21 2.72	2.72 3.05	3.05 3.28	3.28 3.52	3.20
Outbound Contacts as a % of Total Contacts	3.6% 7.2%	7.2% 9.5%	9.5% 11.1%	11.1% 18.6%	4.3%
IVR Containment Rate	60.5% 44.9%	44.9% 25.4%	25.4% 11.6%	11.6% 0.0%	18.7%



The Contact Center Balanced Scorecard: An Overview

- The Contact Center balanced scorecard employs a methodology that provides you with a single, all-inclusive measure of your Contact Center performance.
- It combines cost, quality, productivity, agent, and service-level metrics into an overall performance indicator for your Contact Center.
- Your Contact Center score will range between 0 and 100%, and can be compared directly to the scores of other data records in the benchmark.
- By computing your overall score on a monthly or quarterly basis, you can track and trend your performance over time.
- Charting and tracking your Contact Center balanced score is an ideal way to ensure continuous improvement in your Contact Center!



Company XYZ Contact Center Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	\$15.99	\$6.86	\$12.23	41.1%	10.3%
Customer Satisfaction	25.0%	67.9%	91.3%	83.3%	65.8%	16.5%
Agent Utilization	15.0%	37.7%	64.0%	49.6%	45.1%	6.8%
Net First Contact Resolution Rate	15.0%	55.9%	78.9%	71.2%	66.7%	10.0%
Agent Job Satisfaction	10.0%	61.8%	85.1%	84.2%	96.4%	9.6%
Average Speed of Answer (seconds)	10.0%	151	6	62	61.5%	6.2%
Total	100.0%	N/A	N/A	N/A	N/A	59.3%

Step 1

Six critical performance metrics have been selected for the scorecard.

Step 3

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

Step 5

Your score for each metric is then calculated:

$$(\text{worst case} - \text{actual performance}) \div (\text{worst case} - \text{best case}) \times 100$$

Step 2

Each metric has been weighted according to its relative importance.

Step 4

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

Step 6

Your balanced score for each metric is calculated:

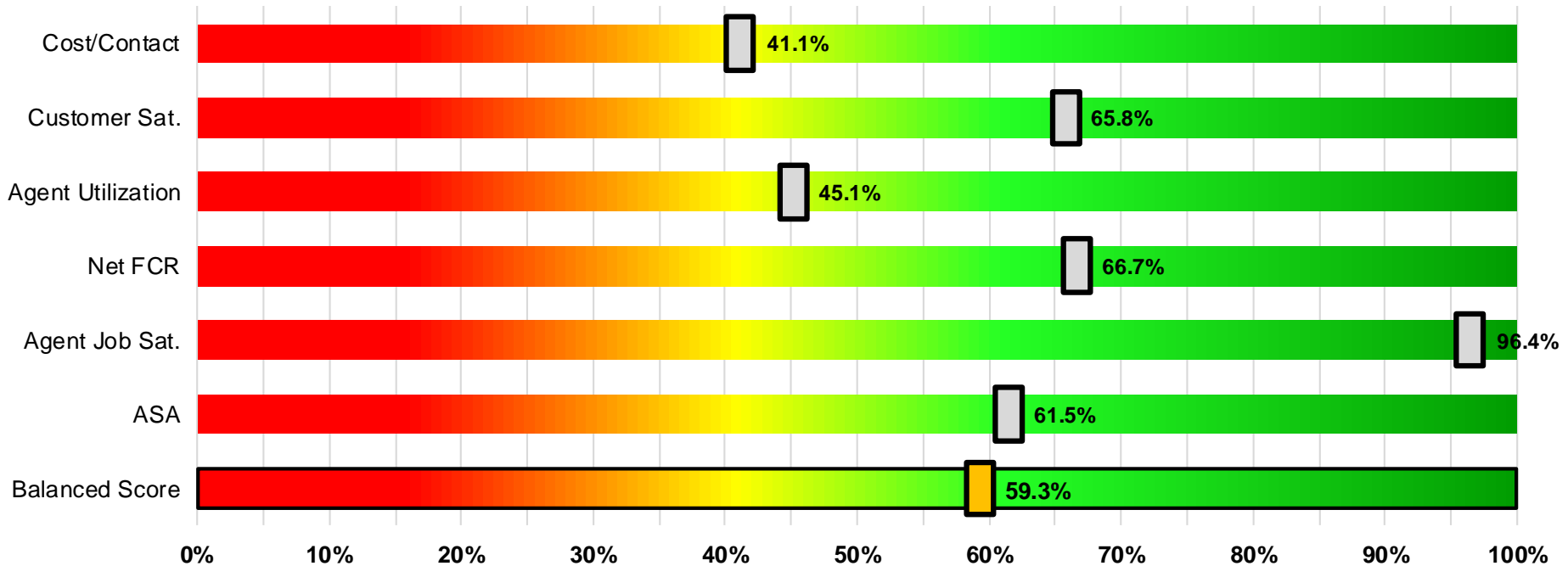
$$\text{metric score} \times \text{weighting}$$



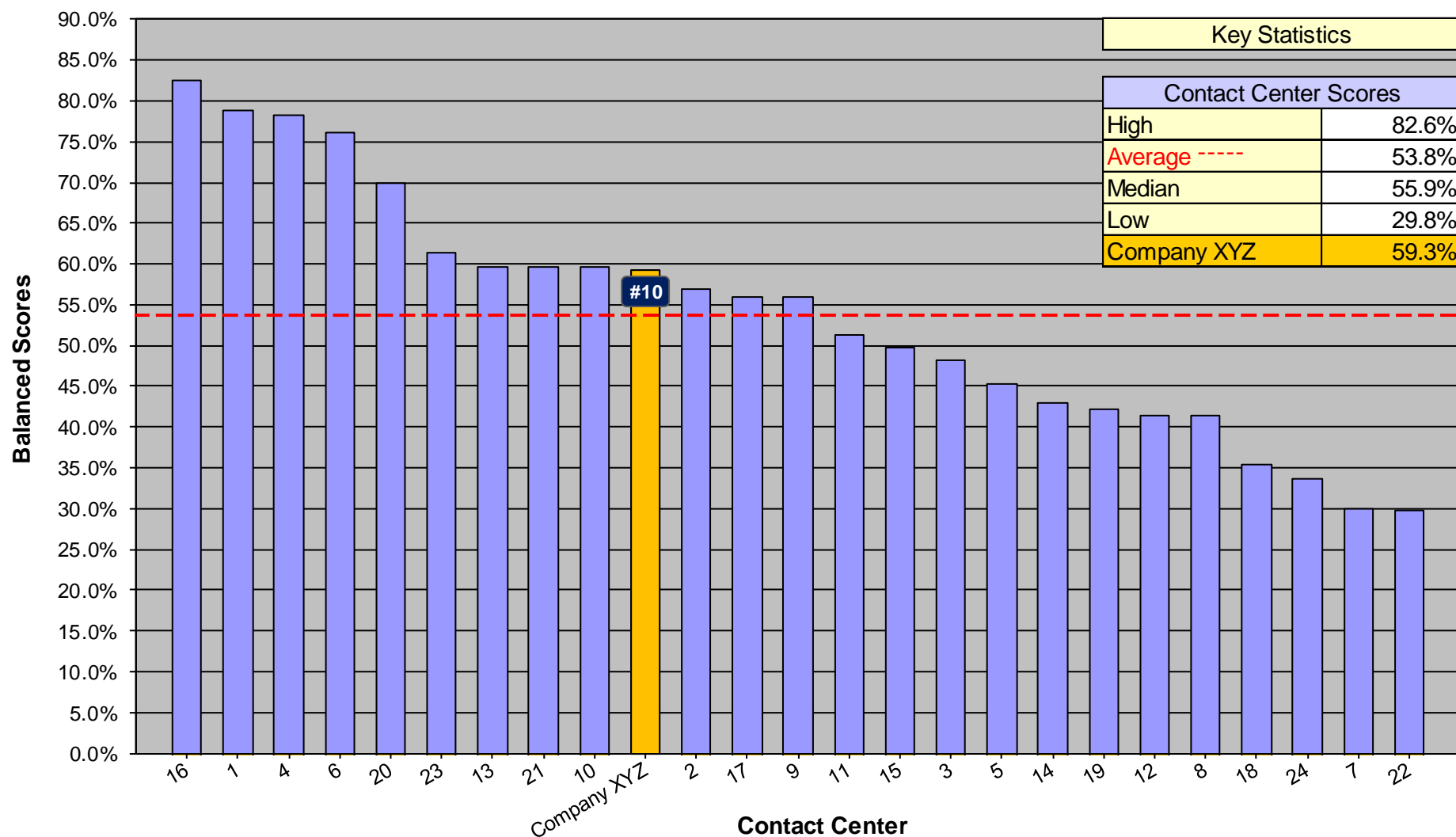
Scorecard KPI Performance Spectrum

Worst KPI Performance

Best KPI Performance



Balanced Scorecard Summary



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



Peer Group Scorecard Summary Data

- The next two pages illustrate the benchmarking peer group performance for each KPI in the scorecard.
- Page 57 ranks each Contact Center from best performer (Contact Center #16) to worst performer (Contact Center #22) based upon their balanced scores.
- Page 58 ranks each KPI in the scorecard from best (top row) to worst (bottom row).



Scorecard Performance Rankings

Scorecard Metrics								
Overall Ranking	Contact Center Number	Cost per Inbound Contact	Customer Satisfaction	Agent Utilization	Net First Contact Resolution Rate	Agent Job Satisfaction	Average Speed of Answer (seconds)	Total Balanced Score
1	16	\$9.93	91.3%	56.5%	77.5%	84.5%	59	82.6%
2	1	\$6.98	83.6%	54.7%	78.9%	85.1%	112	78.8%
3	4	\$6.86	84.0%	54.5%	72.2%	84.5%	63	78.2%
4	6	\$6.86	79.4%	60.2%	71.7%	79.4%	34	76.2%
5	20	\$8.81	82.5%	50.2%	72.9%	78.1%	16	69.9%
6	23	\$8.30	80.2%	58.1%	66.5%	74.8%	109	61.3%
7	13	\$10.19	78.3%	50.2%	67.1%	81.1%	6	59.7%
8	21	\$9.08	79.4%	55.2%	66.3%	75.7%	70	59.6%
9	10	\$8.93	77.3%	52.4%	69.3%	71.9%	25	59.5%
10	Company XYZ	\$12.23	83.3%	49.6%	71.2%	84.2%	62	59.3%
11	2	\$7.93	74.8%	46.1%	70.4%	70.3%	14	56.8%
12	17	\$8.94	75.1%	45.9%	69.2%	83.6%	59	56.0%
13	9	\$7.88	73.1%	64.0%	66.9%	75.4%	151	55.9%
14	11	\$11.93	82.5%	42.7%	68.6%	75.5%	41	51.3%
15	15	\$9.56	77.8%	56.1%	65.7%	62.1%	85	49.7%
16	3	\$11.03	77.0%	44.6%	65.1%	75.9%	23	48.1%
17	5	\$8.84	71.4%	56.6%	64.5%	73.9%	146	45.3%
18	14	\$9.71	71.0%	47.3%	62.0%	72.3%	28	43.0%
19	19	\$11.45	74.3%	52.2%	61.9%	67.8%	33	42.3%
20	12	\$9.58	70.7%	46.8%	62.4%	76.0%	74	41.4%
21	8	\$10.38	73.6%	49.6%	57.2%	71.0%	32	41.4%
22	18	\$14.65	80.3%	49.1%	63.2%	73.6%	122	35.3%
23	24	\$12.29	71.5%	50.8%	58.9%	67.0%	35	33.7%
24	7	\$11.04	67.9%	50.1%	55.9%	61.8%	16	30.0%
25	22	\$15.99	74.5%	37.7%	64.1%	80.4%	15	29.8%
Key Statistics	Average	\$9.97	77.4%	51.2%	66.8%	75.4%	57	53.8%
	Max	\$15.99	91.3%	64.0%	78.9%	85.1%	151	82.6%
	Min	\$6.86	67.9%	37.7%	55.9%	61.8%	6	29.8%
	Median	\$9.58	77.3%	50.2%	66.5%	75.5%	41	55.9%

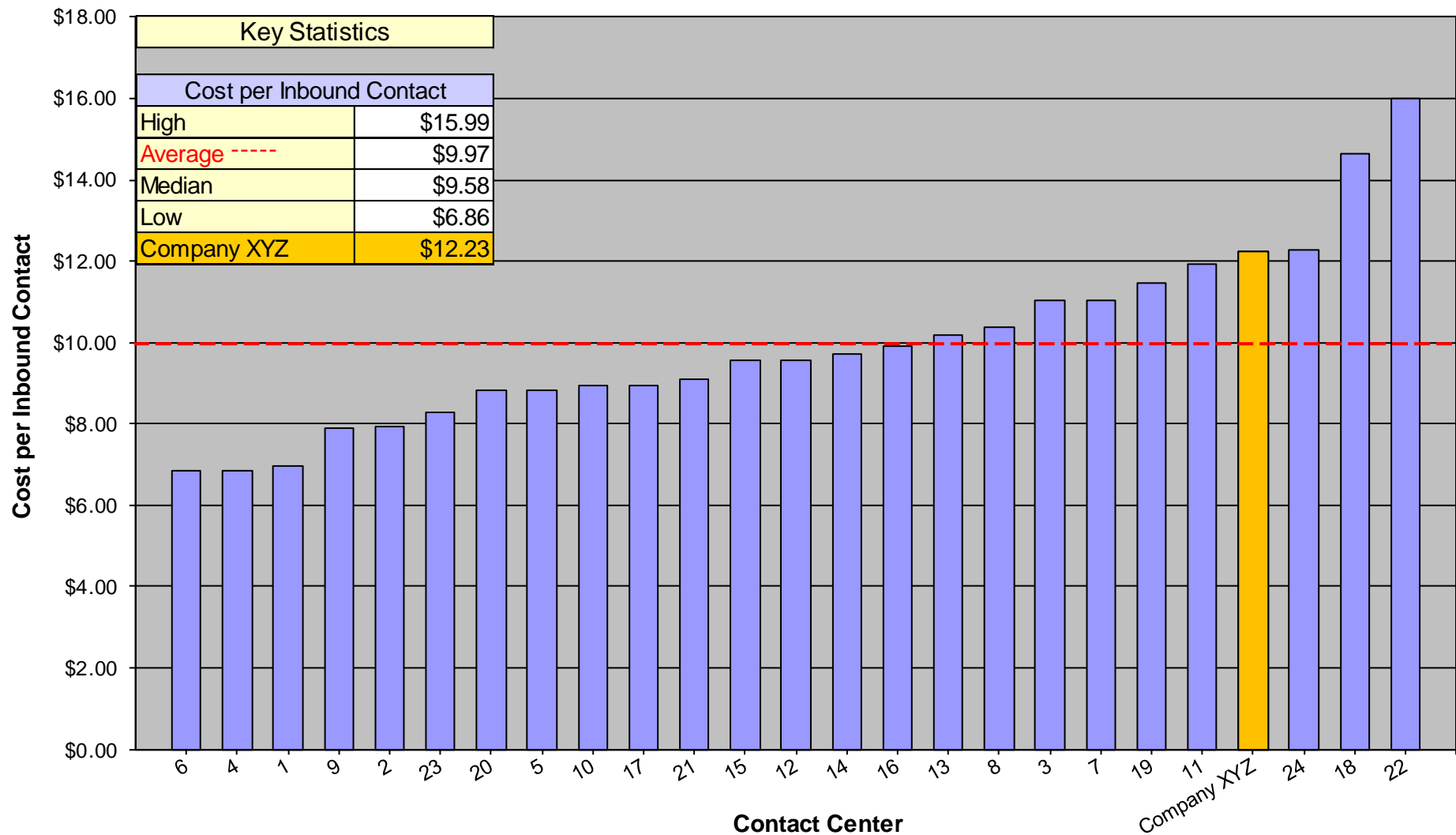


KPI Data in Rank Order

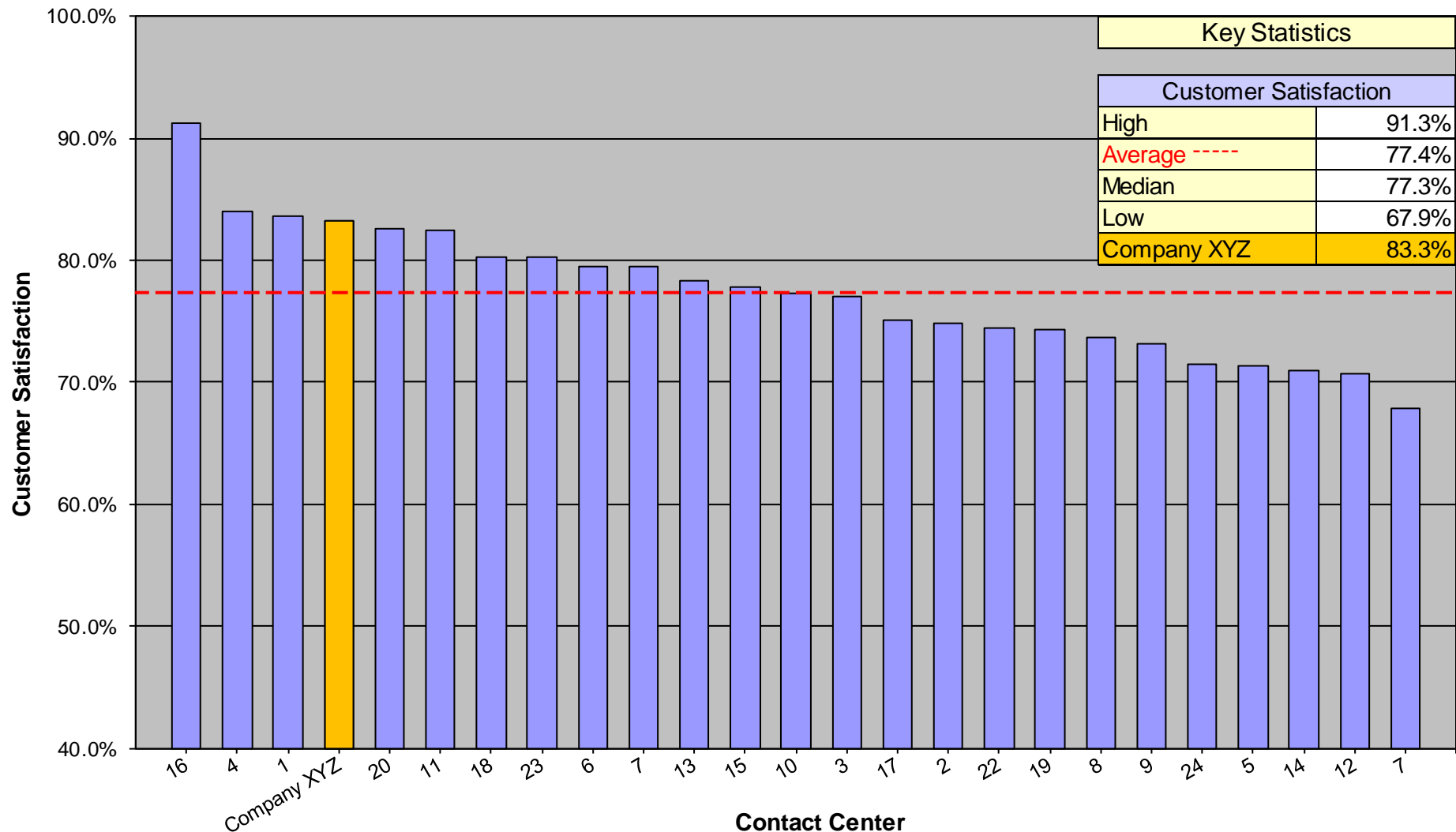
Scorecard Metrics							
	Cost per Inbound Contact	Customer Satisfaction	Agent Utilization	Net First Contact Resolution Rate	Agent Job Satisfaction	Average Speed of Answer (seconds)	Total Balanced Score
Company XYZ	\$12.23	83.3%	49.6%	71.2%	84.2%	62	59.3%
Ranking	22	4	17	6	4	16	10
Quartile	4	1	3	1	1	3	2
1	\$6.86	91.3%	64.0%	78.9%	85.1%	6	82.6%
2	\$6.86	84.0%	60.2%	77.5%	84.5%	14	78.8%
3	\$6.98	83.6%	58.1%	72.9%	84.5%	15	78.2%
4	\$7.88	83.3%	56.6%	72.2%	84.2%	16	76.2%
5	\$7.93	82.5%	56.5%	71.7%	83.6%	16	69.9%
6	\$8.30	82.5%	56.1%	71.2%	81.1%	23	61.3%
7	\$8.81	80.3%	55.2%	70.4%	80.4%	25	59.7%
8	\$8.84	80.2%	54.7%	69.3%	79.4%	28	59.6%
9	\$8.93	79.4%	54.5%	69.2%	78.1%	32	59.5%
10	\$8.94	79.4%	52.4%	68.6%	76.0%	33	59.3%
11	\$9.08	78.3%	52.2%	67.1%	75.9%	34	56.8%
12	\$9.56	77.8%	50.8%	66.9%	75.7%	35	56.0%
13	\$9.58	77.3%	50.2%	66.5%	75.5%	41	55.9%
14	\$9.71	77.0%	50.2%	66.3%	75.4%	59	51.3%
15	\$9.93	75.1%	50.1%	65.7%	74.8%	59	49.7%
16	\$10.19	74.8%	49.6%	65.1%	73.9%	62	48.1%
17	\$10.38	74.5%	49.6%	64.5%	73.6%	63	45.3%
18	\$11.03	74.3%	49.1%	64.1%	72.3%	70	43.0%
19	\$11.04	73.6%	47.3%	63.2%	71.9%	74	42.3%
20	\$11.45	73.1%	46.8%	62.4%	71.0%	85	41.4%
21	\$11.93	71.5%	46.1%	62.0%	70.3%	109	41.4%
22	\$12.23	71.4%	45.9%	61.9%	67.8%	112	35.3%
23	\$12.29	71.0%	44.6%	58.9%	67.0%	122	33.7%
24	\$14.65	70.7%	42.7%	57.2%	62.1%	146	30.0%
25	\$15.99	67.9%	37.7%	55.9%	61.8%	151	29.8%
Average	\$9.97	77.4%	51.2%	66.8%	75.4%	57	53.8%
Max	\$15.99	91.3%	64.0%	78.9%	85.1%	151	82.6%
Min	\$6.86	67.9%	37.7%	55.9%	61.8%	6	29.8%
Median	\$9.58	77.3%	50.2%	66.5%	75.5%	41	55.9%



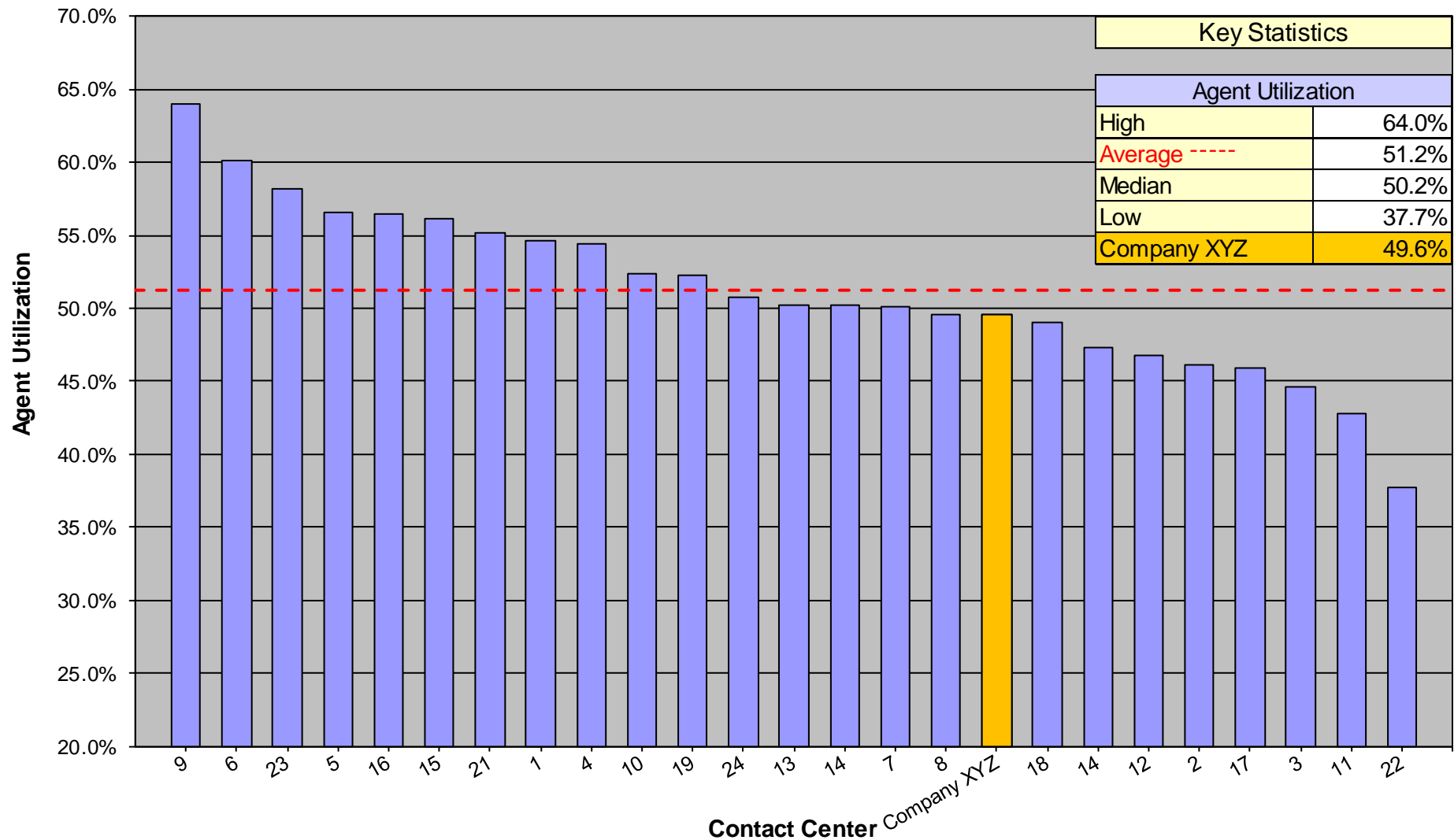
Scorecard Metrics: Cost per Inbound Contact



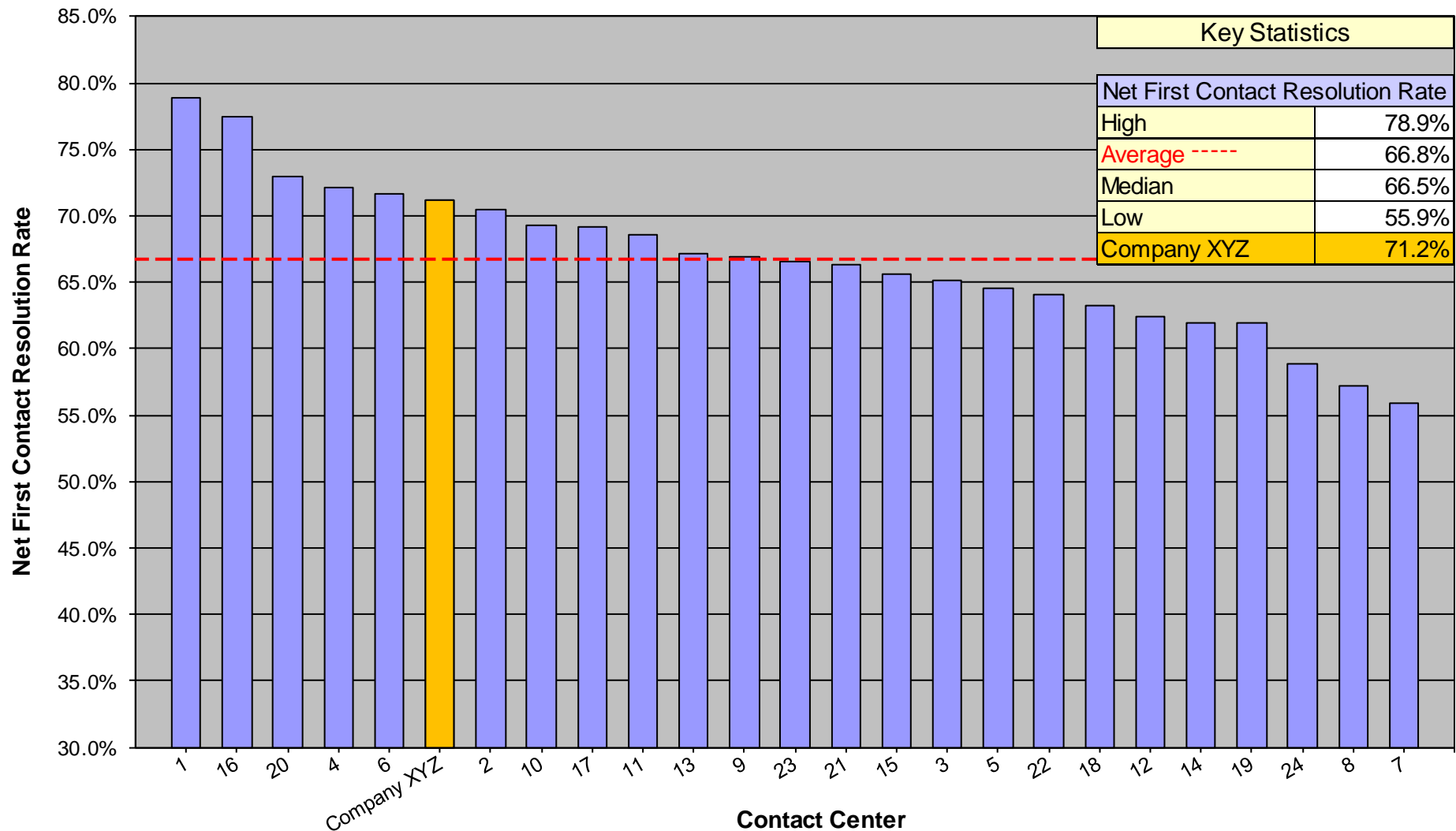
Scorecard Metrics: Customer Satisfaction



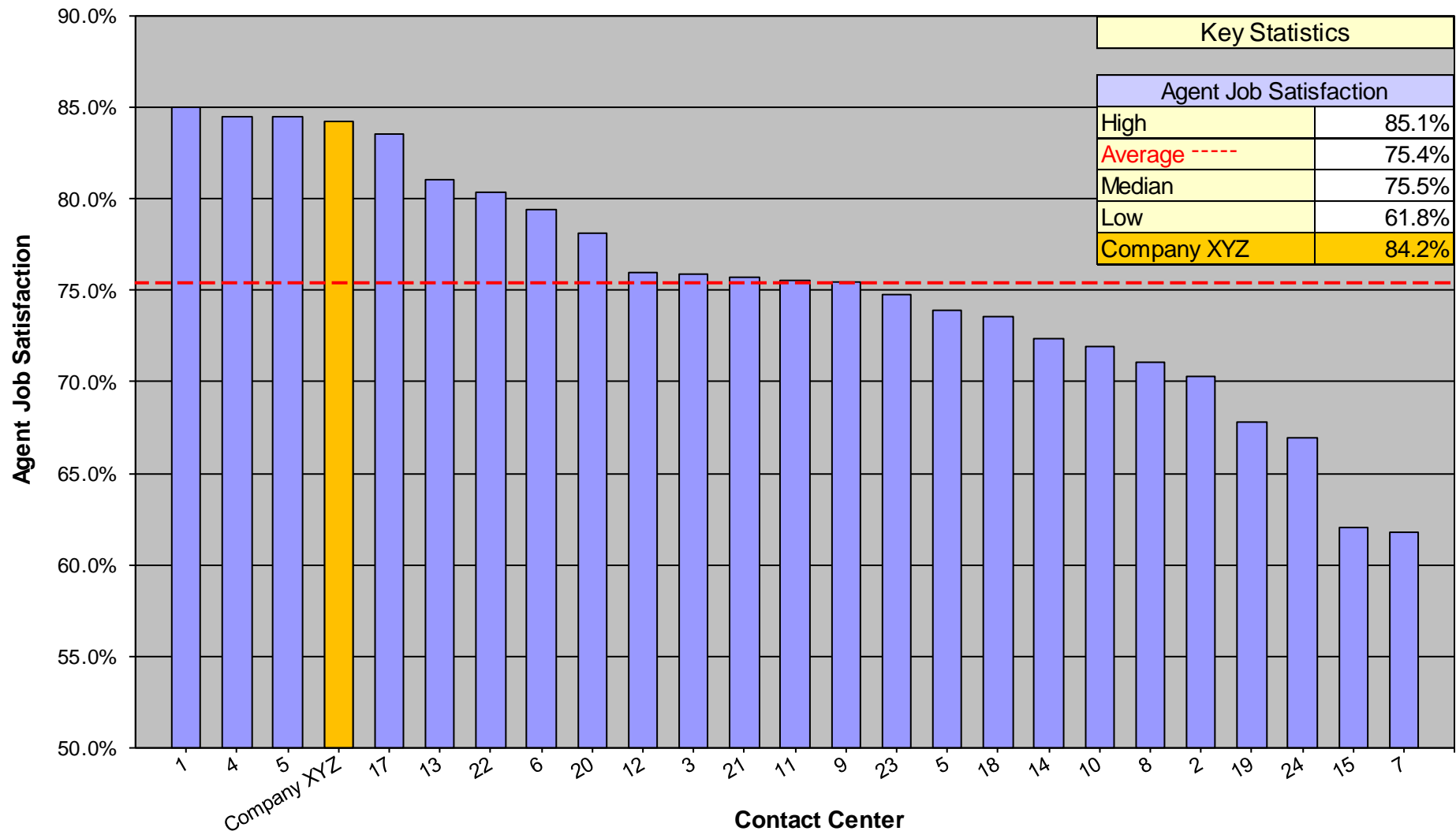
Scorecard Metrics: Agent Utilization



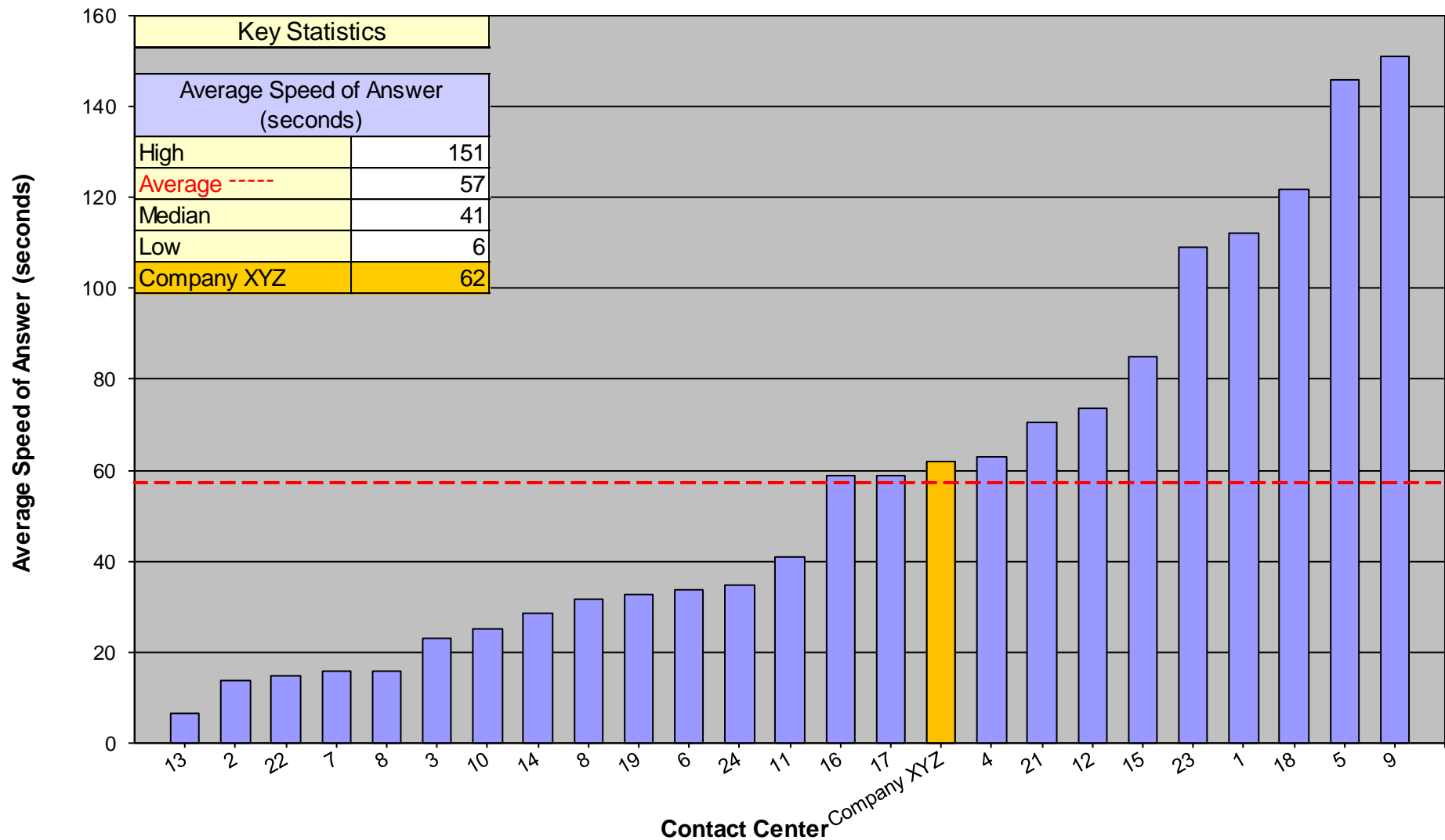
Scorecard Metrics: Net First Contact Resolution Rate



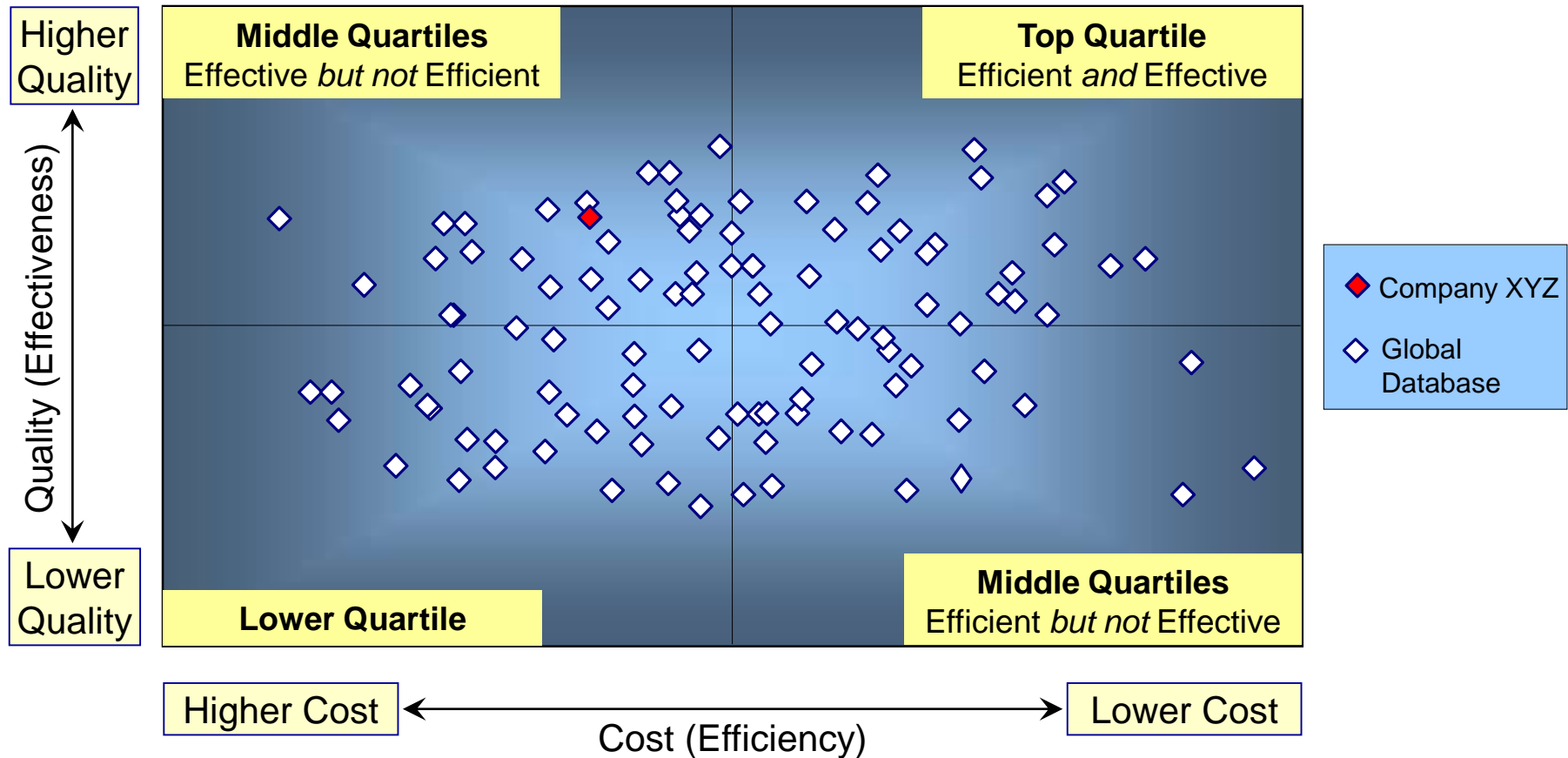
Scorecard Metrics: Agent Job Satisfaction



Scorecard Metrics: Average Speed of Answer



Cost vs. Quality for Company XYZ Contact Center

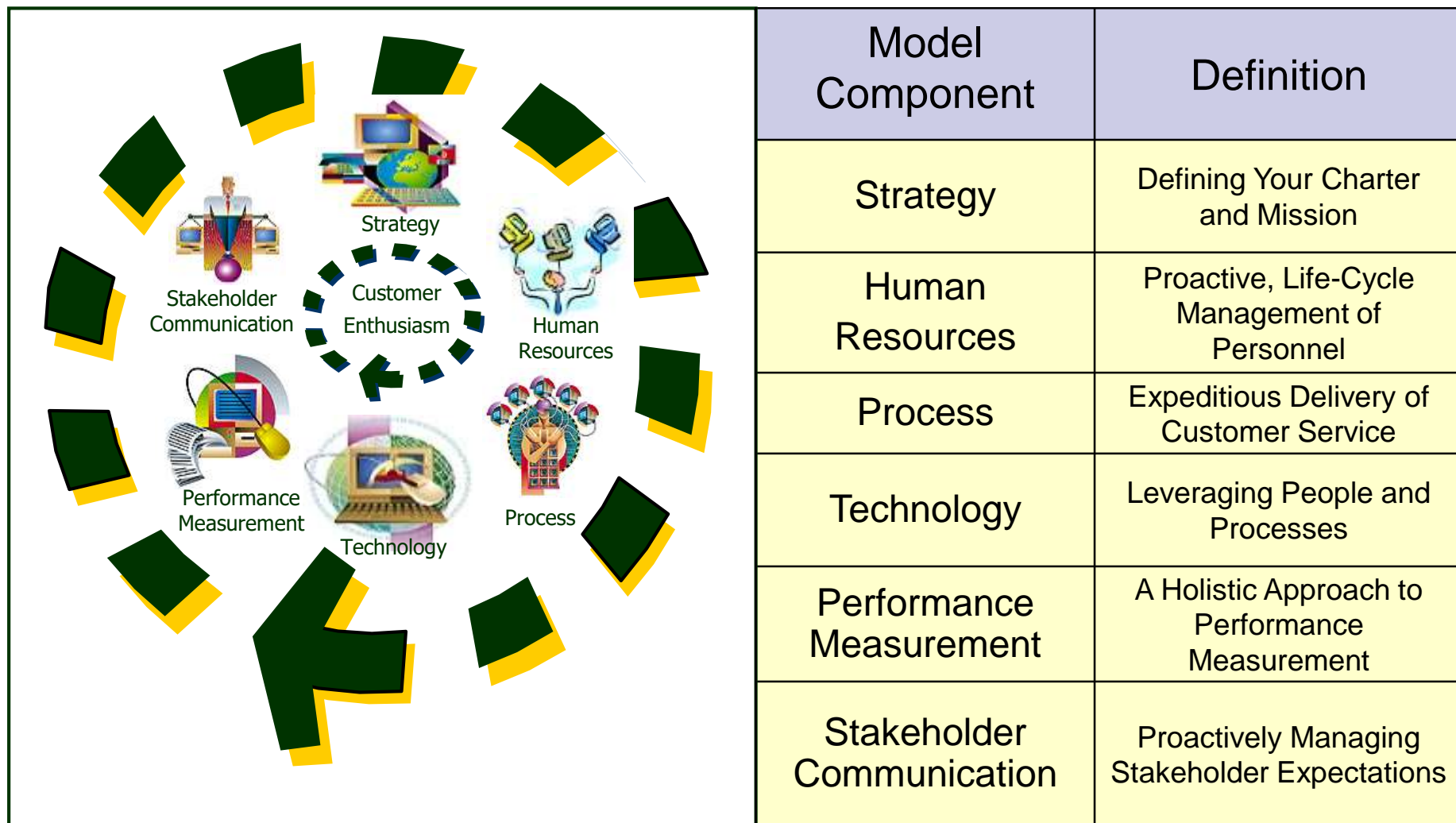




Best Practices Process Assessment



Six-Part Model for Contact Center Best Practices



Best Practices Evaluation Criteria

Ranking	Explanation
1	No Knowledge of the Best Practice.
2	Aware of the Best Practice, but not applying it.
3	Aware of the Best Practice, and applying at a rudimentary level.
4	Best Practice is being effectively applied.
5	Best Practice is being applied in a world-class fashion.



MetricNet Has Defined 56 Contact Center Best Practices

Strategy

- 6 Best Practices

Human Resources

- 13 Best Practices

Process

- 12 Best Practices

Technology

- 6 Best Practices

Performance Measurement

- 11 Best Practices

Communication

- 8 Best Practices

Total Score from 56 to 280 (converted to scale of 0 to 100%)

- The lowest score possible on the Best Practices Process Assessment is 56:
Maturity Level 1 X 56 Best Practices = 56 (0%)
- The highest score possible on the Best Practices Process Assessment is 360:
Maturity Level 5 X 56 Best Practices = 280 (100%)



Strategy: 6 Best Practices

Best Practice	Strategy Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Contact Center has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	4.0	3.27
2	The Contact Center has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	4.0	2.79
3	The Contact Center is well integrated into the company value chain. The Contact Center acts as the "voice of the customer," and is involved in product decisions and deliberations that affect customers. The Contact Center is alerted ahead of time so that they can prepare for major product changes and marketing campaigns.	3.5	3.02
4	The Contact Center has SLA's that define the level of service to be delivered to customers. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0	3.43
5	The Contact Center has OLA's (Operating Level Agreements) with other support groups in the organization (information technology, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	2.0	1.88
6	The Contact Center actively seeks to improve First Contact Resolution Rates, Level 0 Resolution Rates (Customer Self-Help), and Level -1 (Contact Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these objectives.	3.0	3.05
Summary Statistics		Total Score	20.50
		Average Score	3.42
			2.91



Human Resources: 13 Best Practices

Best Practice	Human Resources Best Practices Defined		Company XYZ's Score	Peer Group Average	
1	The Contact Center has a formalized and documented recruiting process for filling vacancies. Job requirements are well defined, and candidates are tested for both technical skills and customer-service soft skills.		4.5	2.74	
2	New hires go through a formal training curriculum, including product knowledge and customer-service skills, and are required to pass a proficiency exam before independently handling customer contacts.		3.0	3.99	
3	Veteran agents (more than 6 months of experience) have access to training opportunities to improve their skill set, job performance, and the overall performance of the Contact Center. Veteran agents are required to complete a minimum number of refresher training hours each year.		4.0	2.23	
4	Agent training classes and curricula are specifically designed to maximize customer satisfaction and the number of inquiries resolved on first contact.		4.0	1.62	
5	Individual agent training plans are clearly defined, documented, and regularly updated.		3.5	1.95	
6	The Contact Center has a formalized, documented agent career path. Agents are made aware of their career advancement opportunities, and are encouraged to proactively manage their careers. Agents are coached at least once yearly on their career path and career-advancement options.		3.0	2.68	
7	Agents have the opportunity to advance their careers in at least two ways: by improving their technical and customer service skills, and by improving their management and supervisory skills.		5.0	2.07	
8	Agents are coached by their supervisors in one-on-one sessions on a monthly basis. Recorded calls are reviewed, and the supervisors provide specific suggestions to each agent on how to improve performance.		5.0	2.70	
9	Agents have quantifiable performance goals (for call quality, customer satisfaction, number of calls handled per month, etc.), and are held accountable for achieving their goals on a monthly basis.		4.0	3.24	
10	Agents are eligible for incentives and rewards based upon performance. These could include monetary incentives such as annual bonuses, or other incentives such as time off work, gift certificates, etc.		3.5	2.48	
11	Agent performance goals are linked to and aligned with the overall Contact Center goals and performance targets.		5.0	1.90	
12	Agent job satisfaction surveys are conducted at least once per year, and the results of the surveys are used to manage and improve agent morale.		5.0	1.81	
13	Formal performance reviews are scheduled and completed for all personnel at least once annually.		5.0	4.17	
	Summary Statistics		Total Score	54.50	33.58
Average Score			4.19	2.58	



Process: 12 Best Practices

Best Practice	Process Best Practices Defined		Company XYZ's Score	Peer Group Average	
1	The Contact Center is designed as a Single Point of Contact (SPOC) for all customer issues and requests.		5.0	3.53	
2	Customers are offered a range of access options to the Contact Center, including live voice, voicemail, email, web chat, self service, and fax.		4.0	4.11	
3	Contact handling processes are standardized, documented, and available to Contact Center agents online. With few exceptions, the standards are followed by the Contact Center agents.		4.0	3.18	
4	Escalation points are well defined and documented. These include other support groups (technical support, etc.), and individuals to whom calls may be escalated.		3.5	3.77	
5	Rules for escalation and call transfer are well defined and documented. Agents know when and where to transfer or route a call if they are unable to assist the customer.		3.5	3.60	
6	Indirect contact channels, including email, voicemail, and fax are treated with the same priority as live phone calls and chat sessions. The work queues from these channels are integrated, or worked in parallel.		2.0	1.82	
7	The Contact Center has contingency plans to handle sudden, unexpected spikes in contact volume. These could include having supervisors and other indirect personnel handle incoming calls during a call spike.		4.0	2.58	
8	The Contact Center has contingency plans to handle both short and long term interruptions in service delivery.		3.0	1.95	
9	The Contact Center has a formal knowledge-management process that facilitates the acquisition, qualification, review, approval, and population of knowledge into a knowledgebase.		4.0	2.37	
10	The Contact Center has a mature workforce scheduling process that achieves high agent utilization, while maintaining reasonable service levels.		3.5	2.80	
11	The Contact Center has an effective, ongoing process for projecting future workload and staffing requirements.		3.5	2.08	
12	The Contact Center conducts periodic root-cause analysis (RCA) on the customer contact profile to identify customer trends and preferences.		3.0	2.77	
	Summary Statistics		Total Score	43.00	34.56
Average Score			3.58	2.88	



Technology: 6 Best Practices

Best Practice	Technology Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Contact Center has a full-featured ticket management system that facilitates effective ticket tracking, service-level compliance, reporting, and root-cause analysis.	3.5	3.26
2	The Contact Center has a comprehensive knowledge-management tool that facilitates effective knowledge capture and reuse. Contact Center agents are able to quickly find solutions to customer questions by searching the knowledgebase. Solutions for the vast majority of customer inquiries can be found in the knowledgebase.	4.0	1.62
3	The Contact Center knowledgebase is used continuously by all Contact Center agents, and results in higher First Contact Resolution rates and lower contact handle times.	4.0	1.49
4	The Contact Center has an effective, integrated self-service portal that is available to all customers. The self-service portal provides information, FAQ's, and answers to the most common customer questions. The tool includes a direct link to Contact Center agents. Customers are aware of the self-service portal, and usage rates are continuously increasing.	3.0	1.71
5	The Contact Center has a multi-year plan for an integrated technology strategy.	2.0	1.45
6	The Contact Center utilizes a capital investment justification process based on ROI, and reports on post-installation ROI as part of this process.	1.0	1.59
Summary Statistics		Total Score	17.50
		Average Score	2.92
			11.12
			1.85



Performance Measurement: 11 Best Practices

Best Practice	Performance Measurement Best Practices Defined	Company XYZ's Score	Peer Group Average	
1	Cost per Contact is measured, recorded, and tracked on an ongoing basis.	1.0	2.61	
2	Customer Satisfaction is measured, recorded, and tracked on an ongoing basis.	4.5	3.34	
3	First Contact Resolution is measured, recorded, and tracked on an ongoing basis.	4.0	2.98	
4	Agent Utilization is measured, recorded, and tracked on an ongoing basis.	2.0	1.99	
5	Agent Job Satisfaction is measured, recorded, and tracked.	5.0	1.76	
6	The Contact Center maintains a balanced scorecard that provides a single, all-inclusive measure of Contact Center performance.	1.0	1.81	
7	The Contact Center conducts event-driven customer surveys, whereby the results of customer-satisfaction surveys can be linked back to a specific inquiry and to a specific agent handling the contact at the Contact Center.	5.0	3.08	
8	Contact Center measures are used holistically and diagnostically to identify performance gaps in Contact Center performance, and to prescribe actions that will improve performance.	3.5	2.01	
9	The Contact Center conducts benchmarking at least once per year.	4.0	2.50	
10	Contact Center KPI's are used to establish "stretch" goals.	3.0	2.78	
11	The Contact Center understands key correlations and cause/effect relationships between the various KPI's. This enables the Contact Center to achieve desired performance goals by leveraging and driving the underlying "causal" metrics.	3.0	1.84	
	Summary Statistics	Total Score	36.00	26.70
		Average Score	3.27	2.43



Communication: 8 Best Practices

Best Practice	Communication Best Practices Defined	Company XYZ's Score	Peer Group Average
1	The Contact Center maintains active communication with all stakeholder groups, including Contact Center employees, company managers, and customers.	3.0	2.63
2	The Contact Center has a formal communications schedule, and provides customized content for each stakeholder group.	2.0	2.37
3	The Contact Center meets frequently with other company managers, and has a role in product and promotional decisions. The Contact Center plays the role of "customer advocate" in the meetings.	3.0	2.33
4	The Contact Center receives a "turnover package" for new products or promotions. The turnover package is designed to prepare the Contact Center to provide effective customer support for new products and promotions.	3.0	2.19
5	Customers are told what to expect on resolution time when their ticket is escalated or if a call-back is required.	4.0	2.90
6	The Contact Center monitors all tickets, including those that are escalated, until ticket closure.	4.0	2.45
7	The business role of the Contact Center is communicated to key managers in the company, and expectations are formally established regarding Contact Center roles and responsibilities.	3.0	1.83
8	The Contact Center activates a recorded message when call volumes spike, and wait times increase. The message informs callers that their wait time may be excessive, and provides an estimate of the wait time.	4.5	2.74
	Summary Statistics	Total Score	26.50
		Average Score	3.31



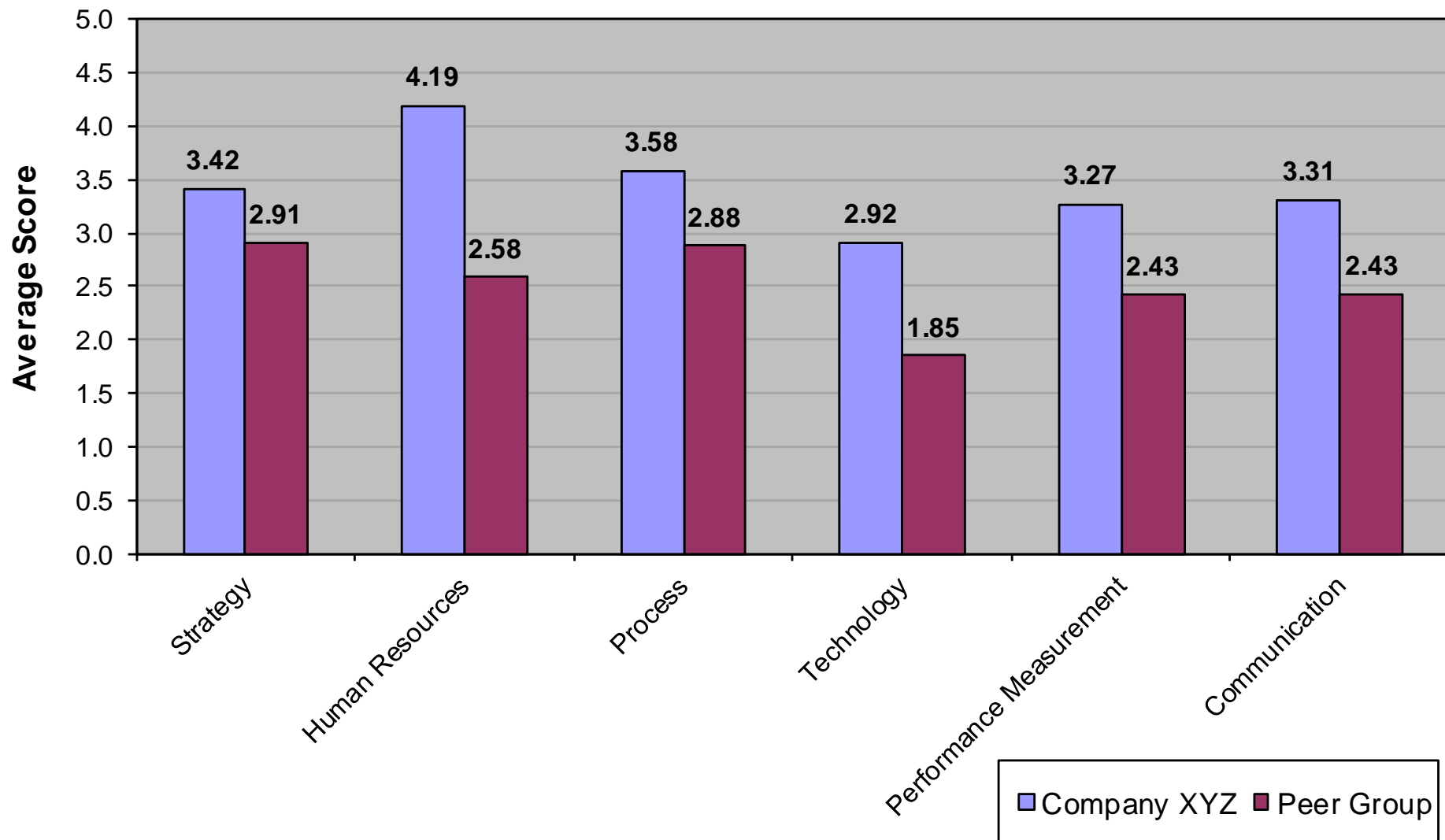
Best Practices Process Assessment Summary

Best Practices Component	Number of Relevant Success Factors	Company XYZ's Average Score	Average Peer Group Score
Strategy	6	3.42	2.91
Human Resources	13	4.19	2.58
Process	12	3.58	2.88
Technology	6	2.92	1.85
Performance Measurement	11	3.27	2.43
Communication	8	3.31	2.43
Total Score		198.0	142.8
Percentage Score		63.4%	38.8%

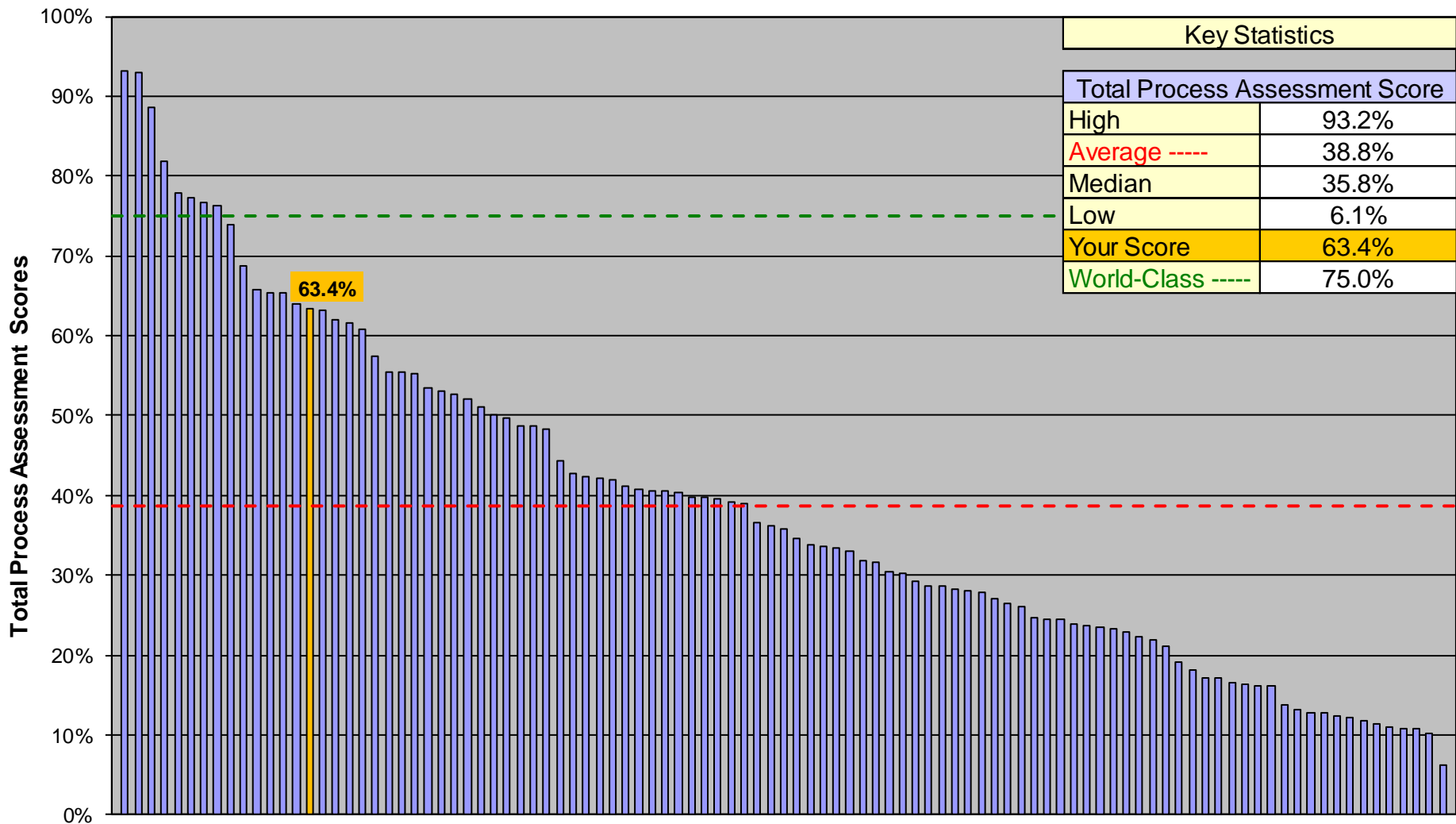
* An average score of 4.0 or above is required in each component of the Best Practices Model to achieve Best Practices Certification.



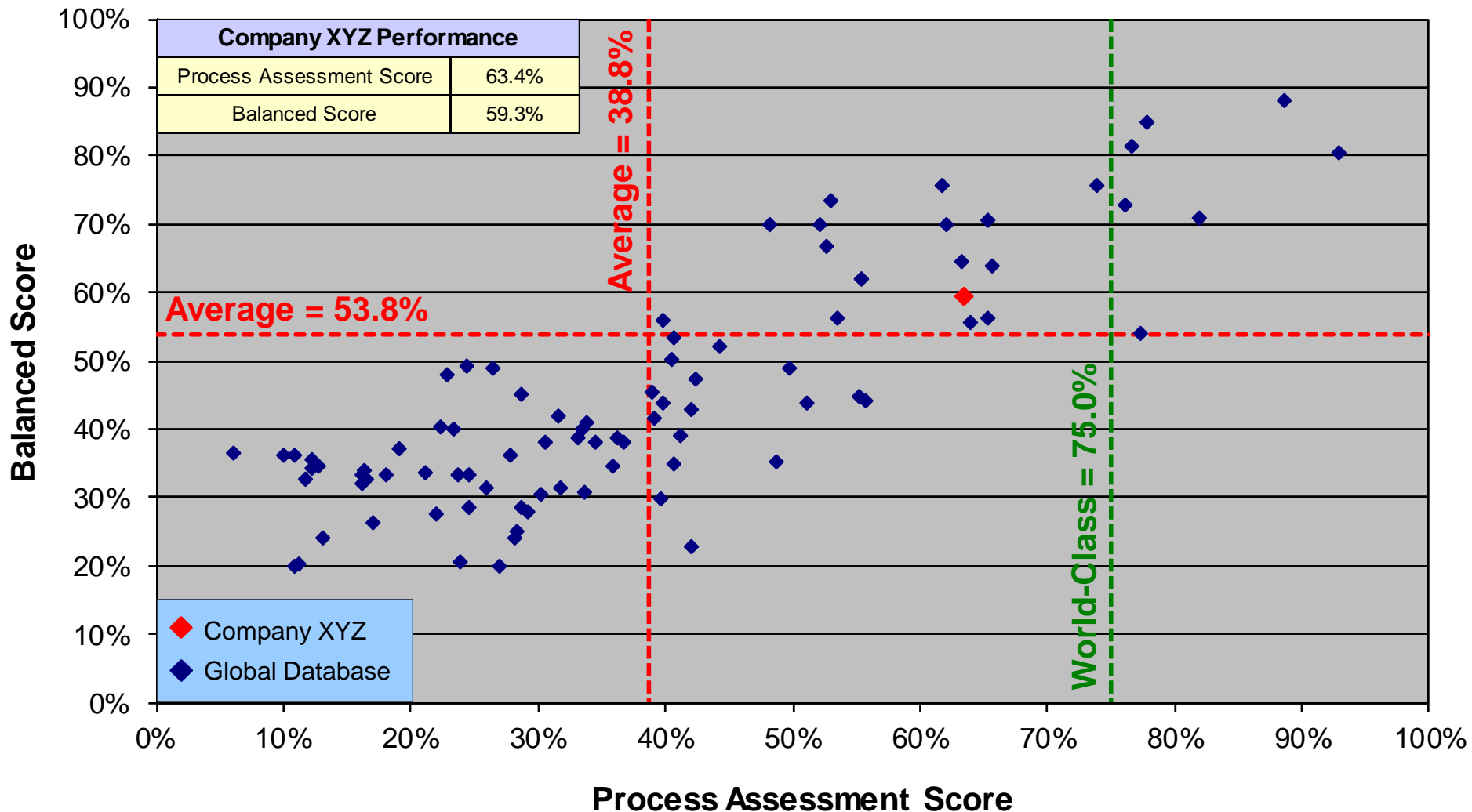
Best Practices Process Assessment Summary



Overall Process Assessment Scores



Process Maturity vs. Scorecard Performance





Interview Themes and Quotes



MetricNet Conducted 10 Interviews

Company XYZ Interviewees	Roles
Aaron Bender	Contact Center Senior Manager
Christopher Drummond	Supervisor
Eric Fletcher	Supervisor
Georgia Hansen	Trainer
Irma Jasper	Quality Assurance Analyst
Kermit Lefkin	Contact Center Agent
Marvin Noonan	Contact Center Agent
Oliver Palmer	Contact Center Agent
Quentin Rose	Contact Center Agent
Shirley Thompson	Contact Center Agent



Key Themes from the Contact Center Interviews

- Most interviewees agreed that the current staffing level is usually sufficient to handle the contact volume.
- A majority of the interviewees said that overall morale is high.
- Some interviewees expressed the need to have more in-depth training for the new agents.
- Most interviewees would like to see more advance communication to the Contact Center about upcoming product changes.
- The interviewees agreed that processes are being improved, but that process consistency and knowledge management are still a challenge.
- Most interviewees said that the Contact Center's technology is adequate but is not strong. They see a need for continued system integration, among other things.
- The lack of space in the Contact Center department was a concern to many interviewees.



Representative Comments from the Interviews

■ STAFFING

- ☐ *"We are currently staffed well. On the weekend, our call queue can be overwhelmed, but the rest of the time the workload is very manageable."*
- ☐ *"We're definitely staffed adequately. When agents are out for illness or vacation, there is usually enough cushion to cover the calls, chats, and emails."*
- ☐ *"The biggest stress for the agents is weekend call volume. It can be pretty exhausting trying to keep up with the influx of calls."*
- ☐ *"Perhaps some schedule shifts to move more agents to cover weekends would help. But overall, we have enough agents to handle the contact volume."*
- ☐ *"Turnover is often a significant issue for us, keeping good people."*
- ☐ *"I feel like having five more agents or so on Saturdays would cover all bases; it would give us a little more time between calls."*
- ☐ *"A year ago just keeping up with the work was very stressful, but for the last few months since we brought on more agents, we've had plenty of room to breathe."*



Representative Comments from the Interviews

■ MORALE

- ☐ *"Morale is quite good right now; the agents feel supported by management."*
- ☐ *"We have a pretty good culture. We get along well and enjoy one another's company, and we care about one another. There is a lot of support from that standpoint."*
- ☐ *"All things considered, morale is pretty good. In spite of some frustrations, we for the most part stick together and keep a positive attitude."*
- ☐ *"I think morale is much better now than it was a year or two ago."*
- ☐ *"Management is quick to ask for our opinion, but I'd like to see them put more stock into it."*
- ☐ *"It's hard to try and keep agents motivated to come in on a Saturday, taking call after call."*
- ☐ *"Overall, on a scale of one to 10, I'd probably give morale an eight. The agents appreciate all the training we get and the encouragement from management. If we had more performance incentives and advancement opportunities, morale would probably be even higher."*



Representative Comments from the Interviews

■ TRAINING

- ☐ *"I think the new-agent training is fairly good. But some of the newer agents have struggled initially. I think a couple more weeks of training would help them get their feet under them more solidly."*
- ☐ *"The initial training has kind of improved; I'm glad they were willing to listen to suggestions. I think they just need to give new agents more time."*
- ☐ *"We get a lot of refresher training. That is very helpful to us, especially with all the changes we've had."*
- ☐ *"The coaching framework and culture has really aided in helping agents with the knowledge and background that is needed."*
- ☐ *"Company XYZ has some online training classes you can choose and do yourself in between calls or on your own time."*
- ☐ *"Training has greatly improved over the course of the last two years. We're still working on getting some training processes up to date, and making sure regular communications are happening."*



Representative Comments from the Interviews

■ CAREER ADVANCEMENT

- *“There are some opportunities that come up depending on when people leave or get promoted. The opportunities are out there.”*
- *“There’s definitely opportunity for advancement, if you’re willing to take the initiative and pursue the opportunities.”*
- *“There are quite a few opportunities for advancement within the Contact Center itself. Also, within the organization, there have been plenty of people who have moved from the Contact Center to other departments.”*

■ PERFORMANCE GOALS AND INCENTIVES

- *“The agents kind of get mixed messages about how to go about their day, and do irrational things to get a low after-call work time or a high schedule adherence (e.g., do follow-up work while still on the phone even though the call is over, or stay in follow-up status for the last ten minutes of their shift).”*
- *“I think daily reporting would be better for the agents, helping motivate them; they could compete with themselves and among themselves.”*



Representative Comments from the Interviews

■ COMMUNICATION

- *“Communication is pretty good. Management uses the email system for most correspondence, so as long as you’re watching your emails you’re fine.”*
- *“We can send an email or IM to the agents, but they may not see it while they’re on the phone. A better dashboard or bulletin-board system would be something helpful, to show common problems.”*
- *“One challenge is not getting information from other teams about changes that will affect us with call volumes. When it comes to planned product changes or rollouts, we should be made aware further ahead of time.”*
- *“Communication is not a strength; sometimes we find out things what other areas are doing either right before or right after they happen.”*
- *“Some groups are great about sending information to our management about changes coming up, but others are more last minute, or we don’t get updates until we’re getting flooded with calls.”*



Representative Comments from the Interviews

■ PROCESSES

- *“Our processes and procedures are a work in progress; they’ve come a long way over the last few years.”*
- *“I’d say that our knowledgebase is not the best I’ve ever seen out there, but it gives the basics of what we need to do.”*
- *“The knowledgebase is built up to where people can come in and pick up the work after less training than we used to need.”*
- *“Searching the knowledgebase can be a struggle. When solutions are hard to find, it affects the agents’ ability to have First Call Resolution and it affects the amount of time it takes to resolve issues. This is frustrating for both the agent and the caller.”*
- *“We need to make training more consistent and make sure we are following all processes and procedures, such as handling calls in a consistent way and making sure all account documentation is clear and thorough.”*



Representative Comments from the Interviews

■ TECHNOLOGY

- ☐ *"The tools we have are definitely adequate. I think there is still some room for improvement with integrating some of our tools, to reduce manual work and errors."*
- ☐ *"Technology is not one of our biggest strengths. The systems are not integrated like some contact centers have; it chews up time and resources."*
- ☐ *"We've tried to piecemeal a lot of systems together, and it causes issues with data integrity; sometimes systems don't talk to each other when they should."*
- ☐ *"I would say that for the most part all the tools that we have will help us get the job done. I don't think there is any tool out there that would help us a lot."*
- ☐ *"The account reset tool needs to be improved, so that the call can be resolved quickly and agents can accept additional calls."*
- ☐ *"Our scheduling software may not be the right fit for us; we've been discussing that."*

■ WORK ENVIRONMENT

- ☐ *"Having more space would help reduce the agents' stress level."*
- ☐ *"It would be nice to have a bigger and more ventilated workspace."*





Conclusions and Recommendations



Notable Strengths



The Company XYZ Contact Center has a number of notable strengths.

- Customer Satisfaction is very high compared to the benchmarking peer group
- Net First Contact Resolution Rate is in the top quartile
 - First Contact Resolution is the primary driver of Customer Satisfaction
- % of Calls Answered in 30 Seconds and Call Abandonment Rate are better than the peer-group averages
- Company XYZ's agent metrics are excellent
 - Agent Job Satisfaction, a key secondary driver of many other metrics, is in the top quartile
 - Agent turnover and absenteeism are low, and tenure, occupancy, schedule adherence, and annual training hours are above the peer-group averages
- The Company XYZ Contact Center scored well above average on the Best Practices Process Assessment
- Company XYZ scored 10th out of 25 Contact Centers on the Balanced Scorecard
 - Second quartile performance overall



But Opportunities for Improvement Remain

- Company XYZ's Cost per Inbound Contact is high compared to the benchmarking peer group
- Agent Utilization is below the peer-group average
 - Utilization is one of the primary drivers of Cost per Contact
- New Agent Training Hours are lower than the peer group average
- IVR Containment Rate is lower than the peer-group average
 - Containing transactions within the IVR or other self-service tools can represent a significant opportunity for cost savings
- Interviewees expressed concerns in the following additional areas:
 - Inadequate communication from other groups about upcoming changes
 - The need for better knowledge management
 - Inadequate system integration
 - The need for more initial training for new agents

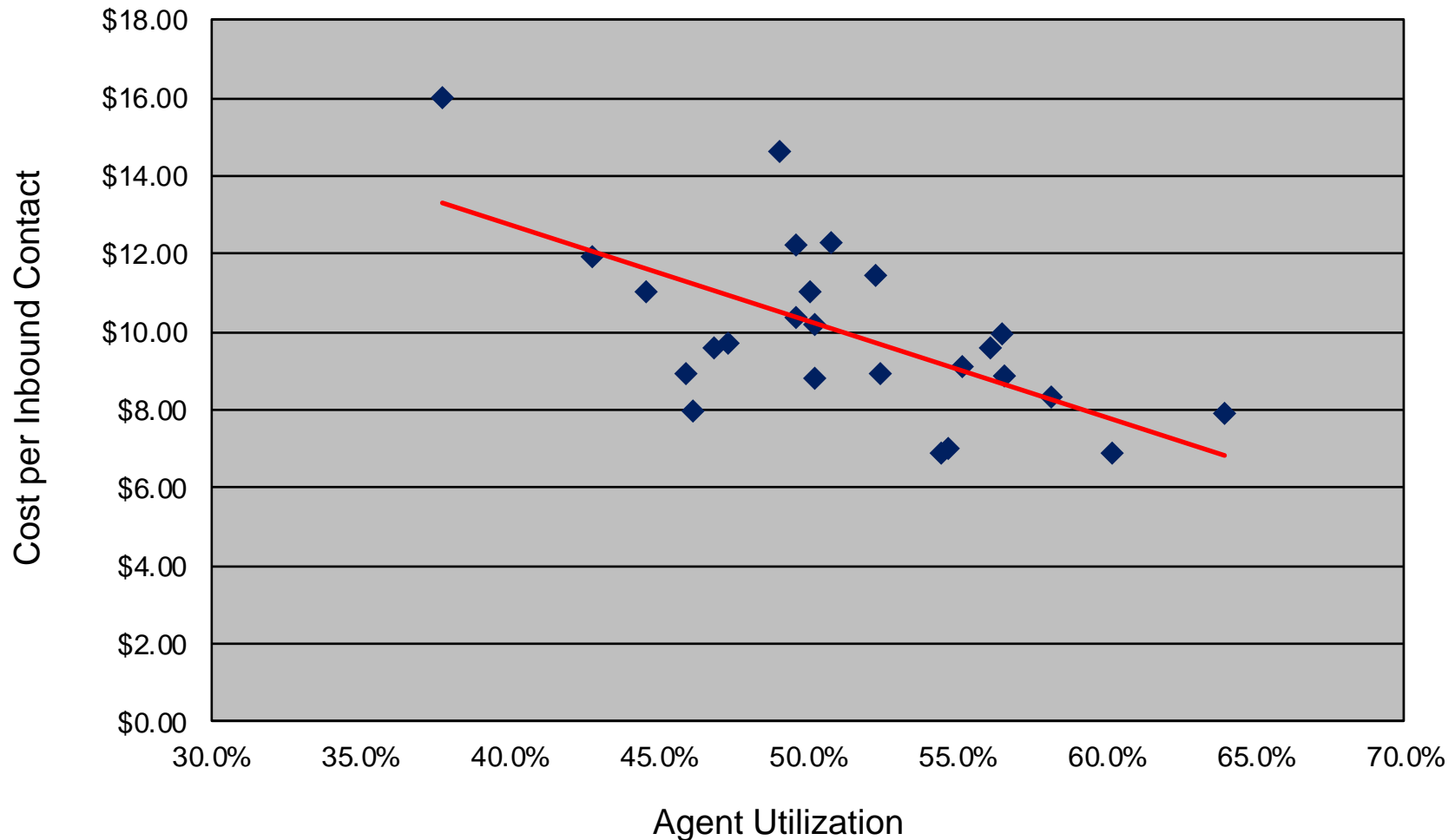


Summary of Benchmarking Recommendations

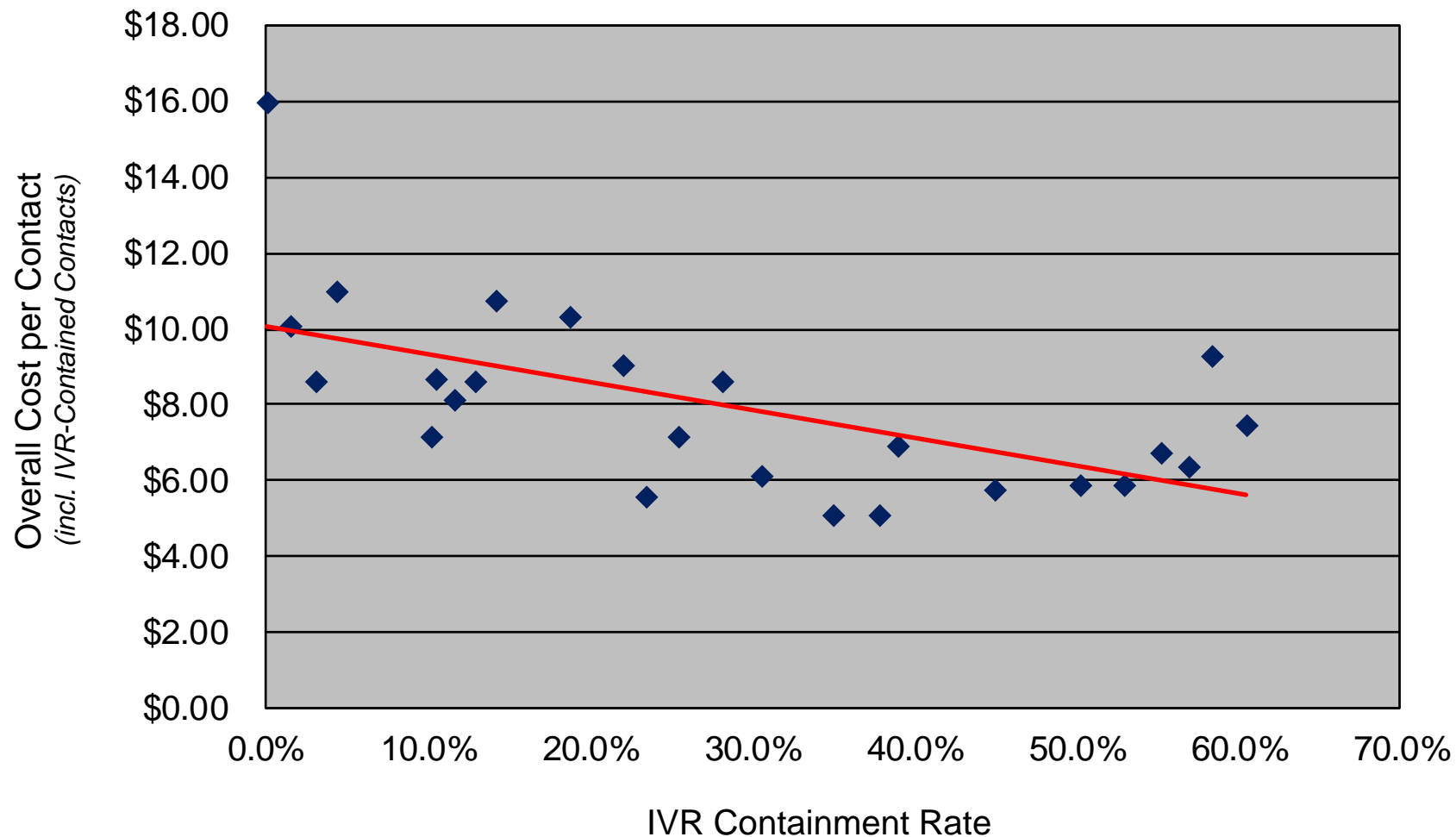
1. Consider utilizing agents more efficiently by allowing attrition to reduce the staffing level slightly.
 - ☐ MetricNet estimates that Company XYZ should reduce the number of Contact Center agents by about 10 FTEs in order to be appropriately staffed.
2. Consider opportunities to deflect contacts into lower-cost channels such as chat, IVR, or online self-service portal.
3. Consider increasing New Agent Training Hours.
4. Consider adopting the MetricNet Contact Center Balanced Scorecard, and update the scorecard monthly.
5. Establish stretch goals in key areas to improve performance.
6. Improve process maturity in compliance with industry best practices.



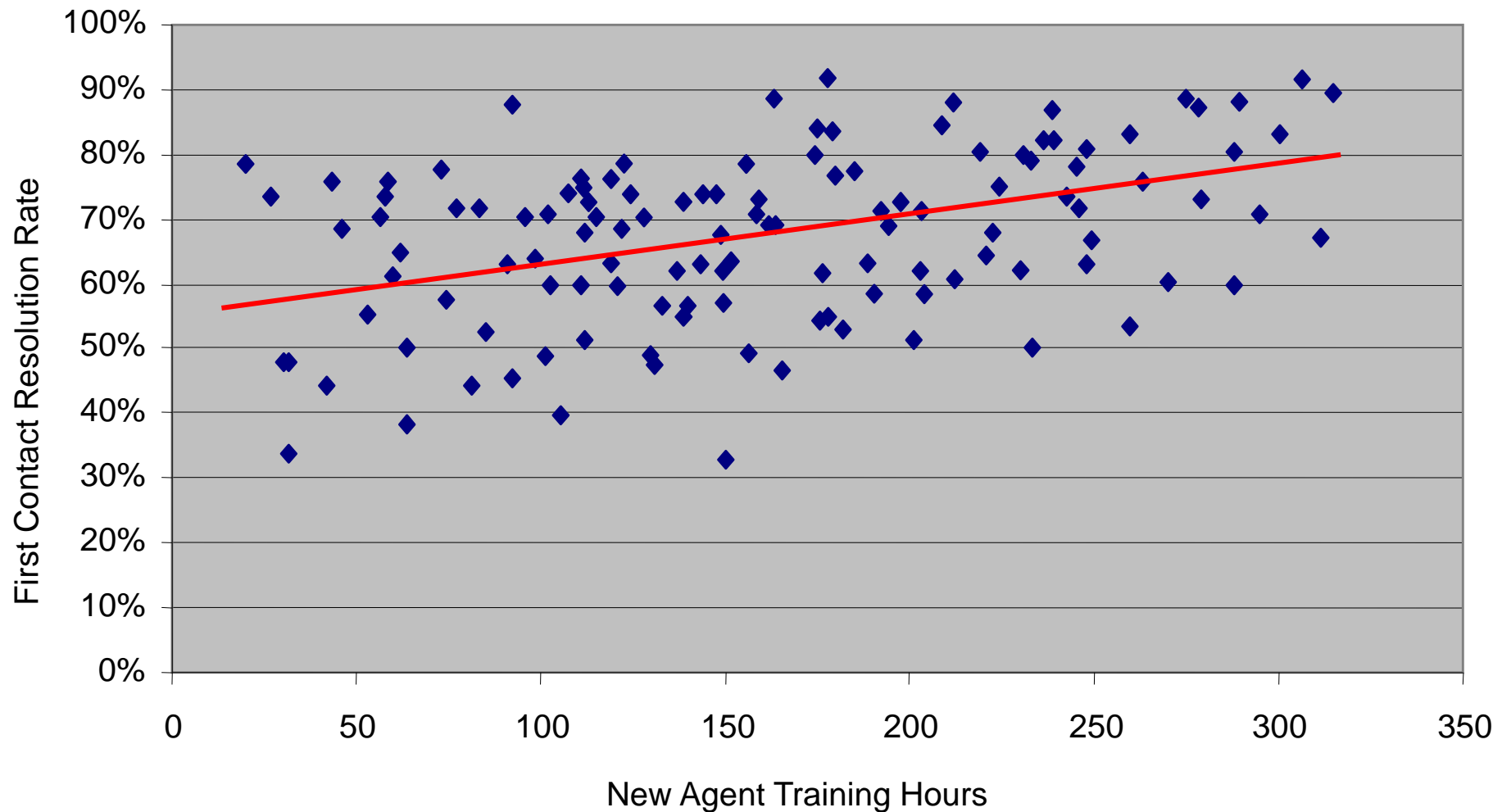
Higher Utilization Reduces Costs



IVR Containment Reduces Costs



Training Can Improve FCR



Consider Adopting the Contact Center Balanced Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	\$15.99	\$6.86	\$12.23	41.1%	10.3%
Customer Satisfaction	25.0%	67.9%	91.3%	83.3%	65.8%	16.5%
Agent Utilization	15.0%	37.7%	64.0%	49.6%	45.1%	6.8%
Net First Contact Resolution Rate	15.0%	55.9%	78.9%	71.2%	66.7%	10.0%
Agent Job Satisfaction	10.0%	61.8%	85.1%	84.2%	96.4%	9.6%
Average Speed of Answer (seconds)	10.0%	151	6	62	61.5%	6.2%
Total	100.0%	N/A	N/A	N/A	N/A	59.3%

Step 1

Six critical performance metrics have been selected for the scorecard.

Step 3

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

Step 5

Your score for each metric is then calculated:

$$(\text{worst case} - \text{actual performance}) \div (\text{worst case} - \text{best case}) \times 100$$

Step 2

Each metric has been weighted according to its relative importance.

Step 4

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

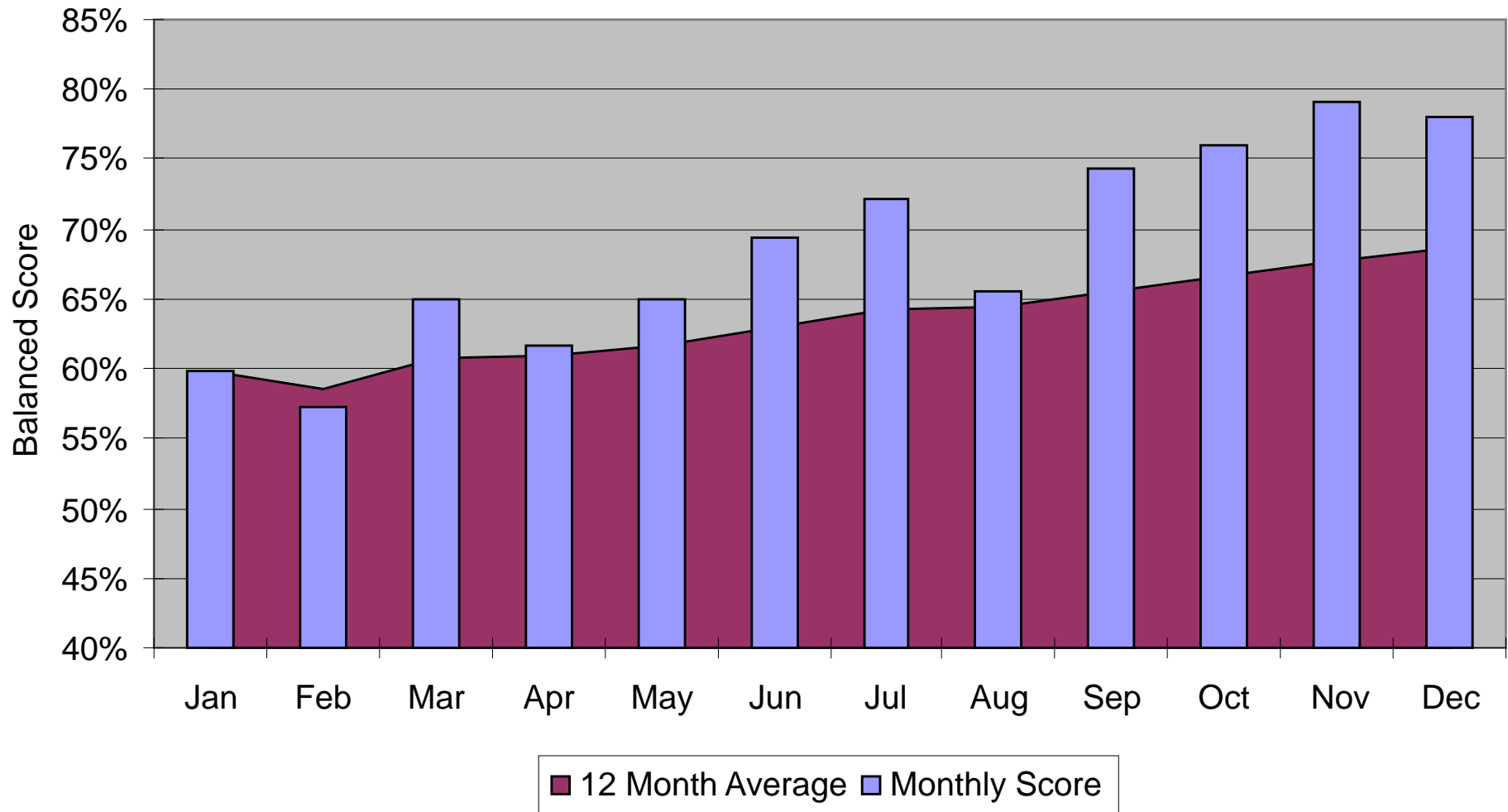
Step 6

Your balanced score for each metric is calculated:

$$\text{metric score} \times \text{weighting}$$



And Updating the Scorecard Monthly



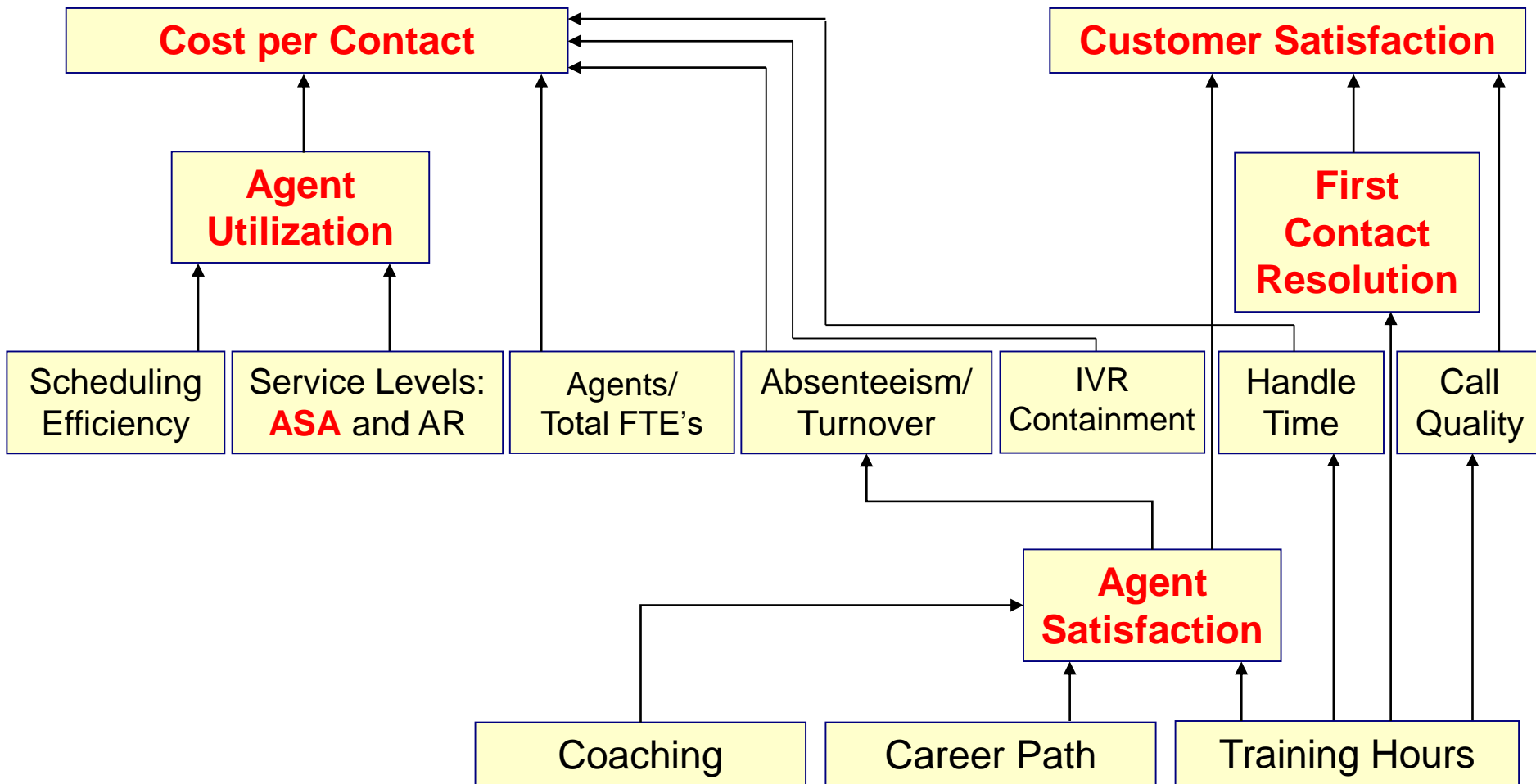
Some Suggested Performance Targets

Performance Metric	Current Company XYZ Performance	Target Performance
Agent Utilization	49.6%	55.0%
Cost per Inbound Contact	\$12.23	\$11.58
Cost per Minute of Inbound Handle Time	\$1.66	\$1.58
Inbound Contacts per Agent per Month	641	705
Outbound Contacts per Agent per Month	29	32
Average Speed of Answer (seconds)	62	70
Call Abandonment Rate	6.9%	8.0%
IVR Containment Rate	18.7%	30.0%
Balanced Score	59.3%	63.6%

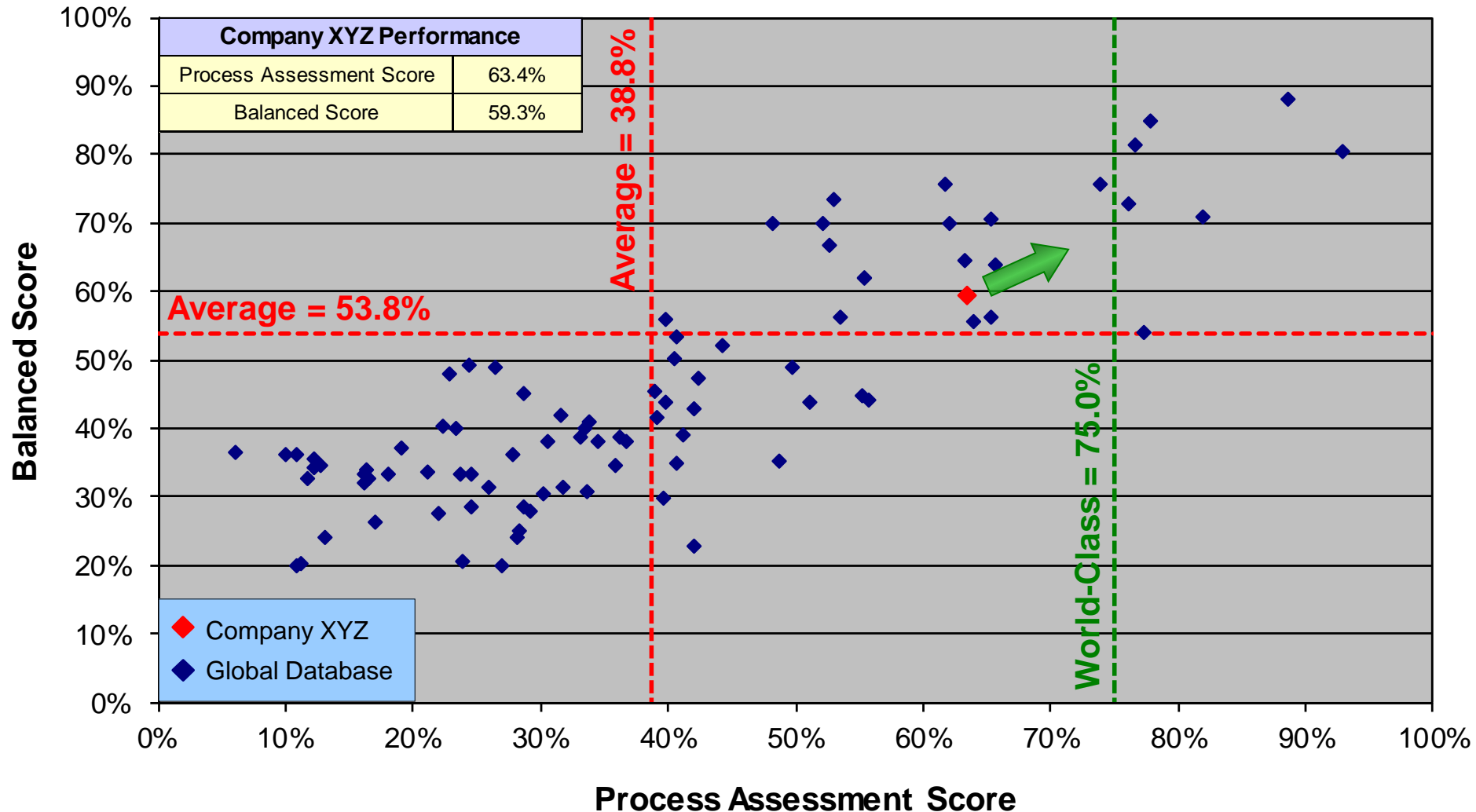
Achieving the performance targets recommended above would increase the Company XYZ Contact Center Balanced Score from 59.3% to 63.6%, and would elevate Company XYZ from 10th place to 6th place (top quartile!) on the Balanced Scorecard.



Cause-and-Effect for Contact Center KPI's



Company XYZ Can Improve Process Maturity Over Time



Process Maturity Focus Area: Strategy

Strategy Best Practices Defined	Company XYZ's Score
The Contact Center has a well-defined mission, vision, and strategy. The vision and strategy are well-documented, and communicated to key stakeholders in the organization.	4.0
The Contact Center has an action plan for continuous improvement. The plan is documented and distributed to key stakeholders in the organization, and specific individuals are held accountable for implementing the action plan.	4.0
The Contact Center has SLA's that define the level of service to be delivered to customers. The SLA's are documented, published, and communicated to key stakeholders in the organization.	4.0
The Contact Center is well integrated into the company value chain. The Contact Center acts as the "voice of the customer," and is involved in product decisions and deliberations that affect customers. The Contact Center is alerted ahead of time so that they can prepare for major product changes and marketing campaigns.	3.5
The Contact Center actively seeks to improve First Contact Resolution Rates, Level 0 Resolution Rates (Customer Self-Help), and Level -1 (Contact Prevention) Resolution Rates by implementing processes, technologies, and training that facilitate these objectives.	3.0
The Contact Center has OLA's (Operating Level Agreements) with other support groups in the organization (information technology, desktop support, field support, etc.). The OLA's clearly define the roles and responsibilities of each support group, and the different support groups abide by the terms of the OLA's.	2.0



Process Maturity Focus Area: Human Resources

Human Resources Best Practices Defined	Company XYZ's Score
Agents have the opportunity to advance their careers in at least two ways: by improving their technical and customer service skills, and by improving their management and supervisory skills.	5.0
Agents are coached by their supervisors in one-on-one sessions on a monthly basis. Recorded calls are reviewed, and the supervisors provide specific suggestions to each agent on how to improve performance.	5.0
Agent performance goals are linked to and aligned with the overall Contact Center goals and performance targets.	5.0
Agent job satisfaction surveys are conducted at least once per year, and the results of the surveys are used to manage and improve agent morale.	5.0
Formal performance reviews are scheduled and completed for all personnel at least once annually.	5.0
The Contact Center has a formalized and documented recruiting process for filling vacancies. Job requirements are well defined, and candidates are tested for both technical skills and customer-service soft skills.	4.5
Veteran agents (more than 6 months of experience) have access to training opportunities to improve their skill set, job performance, and the overall performance of the Contact Center. Veteran agents are required to complete a minimum number of refresher training hours each year.	4.0
Agent training classes and curricula are specifically designed to maximize customer satisfaction and the number of inquiries resolved on first contact.	4.0
Agents have quantifiable performance goals (for call quality, customer satisfaction, number of calls handled per month, etc.), and are held accountable for achieving their goals on a monthly basis.	4.0
Individual agent training plans are clearly defined, documented, and regularly updated.	3.5
Agents are eligible for incentives and rewards based upon performance. These could include monetary incentives such as annual bonuses, or other incentives such as time off work, gift certificates, etc.	3.5
New hires go through a formal training curriculum, including product knowledge and customer-service skills, and are required to pass a proficiency exam before independently handling customer contacts.	3.0
The Contact Center has a formalized, documented agent career path. Agents are made aware of their career advancement opportunities, and are encouraged to proactively manage their careers. Agents are coached at least once yearly on their career path and career-advancement options.	3.0



Process Maturity Focus Area: Process

Process Best Practices Defined	Company XYZ's Score
The Contact Center is designed as a Single Point of Contact (SPOC) for all customer issues and requests.	5.0
Customers are offered a range of access options to the Contact Center, including live voice, voicemail, email, web chat, self service, and fax.	4.0
Contact handling processes are standardized, documented, and available to Contact Center agents online. With few exceptions, the standards are followed by the Contact Center agents.	4.0
The Contact Center has contingency plans to handle sudden, unexpected spikes in contact volume. These could include having supervisors and other indirect personnel handle incoming calls during a call spike.	4.0
The Contact Center has a formal knowledge-management process that facilitates the acquisition, qualification, review, approval, and population of knowledge into a knowledgebase.	4.0
Escalation points are well defined and documented. These include other support groups (technical support, etc.), and individuals to whom calls may be escalated.	3.5
Rules for escalation and call transfer are well defined and documented. Agents know when and where to transfer or route a call if they are unable to assist the customer.	3.5
The Contact Center has a mature workforce scheduling process that achieves high agent utilization, while maintaining reasonable service levels.	3.5
The Contact Center has an effective, ongoing process for projecting future workload and staffing requirements.	3.5
The Contact Center has contingency plans to handle both short and long term interruptions in service delivery.	3.0
The Contact Center conducts periodic root-cause analysis (RCA) on the customer contact profile to identify customer trends and preferences.	3.0
Indirect contact channels, including email, voicemail, and fax are treated with the same priority as live phone calls and chat sessions. The work queues from these channels are integrated, or worked in parallel.	2.0



Process Maturity Focus Area: Technology

Technology Best Practices Defined	Company XYZ's Score
The Contact Center has a comprehensive knowledge-management tool that facilitates effective knowledge capture and reuse. Contact Center agents are able to quickly find solutions to customer questions by searching the knowledgebase. Solutions for the vast majority of customer inquiries can be found in the knowledgebase.	4.0
The Contact Center knowledgebase is used continuously by all Contact Center agents, and results in higher First Contact Resolution rates and lower contact handle times.	4.0
The Contact Center has a full-featured ticket management system that facilitates effective ticket tracking, service-level compliance, reporting, and root-cause analysis.	3.5
The Contact Center has an effective, integrated self-service portal that is available to all customers. The self-service portal provides information, FAQ's, and answers to the most common customer questions. The tool includes a direct link to Contact Center agents. Customers are aware of the self-service portal, and usage rates are continuously increasing.	3.0
The Contact Center has a multi-year plan for an integrated technology strategy.	2.0
The Contact Center utilizes a capital investment justification process based on ROI, and reports on post-installation ROI as part of this process.	1.0



Process Maturity Focus Area: Performance Measurement

Performance Measurement Best Practices Defined	Company XYZ's Score
Agent Job Satisfaction is measured, recorded, and tracked.	5.0
The Contact Center conducts event-driven customer surveys, whereby the results of customer-satisfaction surveys can be linked back to a specific inquiry and to a specific agent handling the contact at the Contact Center.	5.0
Customer Satisfaction is measured, recorded, and tracked on an ongoing basis.	4.5
First Contact Resolution is measured, recorded, and tracked on an ongoing basis.	4.0
The Contact Center conducts benchmarking at least once per year.	4.0
Contact Center measures are used holistically and diagnostically to identify performance gaps in Contact Center performance, and to prescribe actions that will improve performance.	3.5
Contact Center KPI's are used to establish "stretch" goals.	3.0
The Contact Center understands key correlations and cause/effect relationships between the various KPI's. This enables the Contact Center to achieve desired performance goals by leveraging and driving the underlying "causal" metrics.	3.0
Agent Utilization is measured, recorded, and tracked on an ongoing basis.	2.0
Cost per Contact is measured, recorded, and tracked on an ongoing basis.	1.0
The Contact Center maintains a balanced scorecard that provides a single, all-inclusive measure of Contact Center performance.	1.0



Process Maturity Focus Area: Communication

Communication Best Practices Defined	Company XYZ's Score
The Contact Center activates a recorded message when call volumes spike, and wait times increase. The message informs callers that their wait time may be excessive, and provides an estimate of the wait time.	4.5
Customers are told what to expect on resolution time when their ticket is escalated or if a call-back is required.	4.0
The Contact Center monitors all tickets, including those that are escalated, until ticket closure.	4.0
The Contact Center maintains active communication with all stakeholder groups, including Contact Center employees, company managers, and customers.	3.0
The Contact Center meets frequently with other company managers, and has a role in product and promotional decisions. The Contact Center plays the role of "customer advocate" in the meetings.	3.0
The business role of the Contact Center is communicated to key managers in the company, and expectations are formally established regarding Contact Center roles and responsibilities.	3.0
The Contact Center receives a "turnover package" for new products or promotions. The turnover package is designed to prepare the Contact Center to provide effective customer support for new products and promotions.	3.0
The Contact Center has a formal communications schedule, and provides customized content for each stakeholder group.	2.0





Detailed Benchmarking Comparisons





Cost Metrics



Cost Metrics: Cost per Inbound Contact

Definition

Cost per Inbound Contact is the total annual operating expense of the Contact Center divided by the annual inbound contact volume of the Contact Center. Operating expense includes all employee salaries, overtime pay, benefits, and incentive compensation, plus all contractor, facilities, telecom, desktop computing, software licensing, training, travel, office supplies, and miscellaneous expenses. Contact volume includes inbound contacts from all sources: live voice, voicemail, email, web chat, fax, walk-in, etc.

Why it's Important

Cost per Inbound Contact is one of the most important Contact Center metrics. It is a measure of how efficiently your Contact Center conducts its business. A higher-than-average Cost per Contact is not necessarily a bad thing, particularly if accompanied by higher-than-average quality levels. Conversely, a low Cost per Contact is not necessarily good, particularly if the low cost is achieved by sacrificing Call Quality or service levels. Every Contact Center should track and trend Cost per Inbound Contact on a monthly basis.

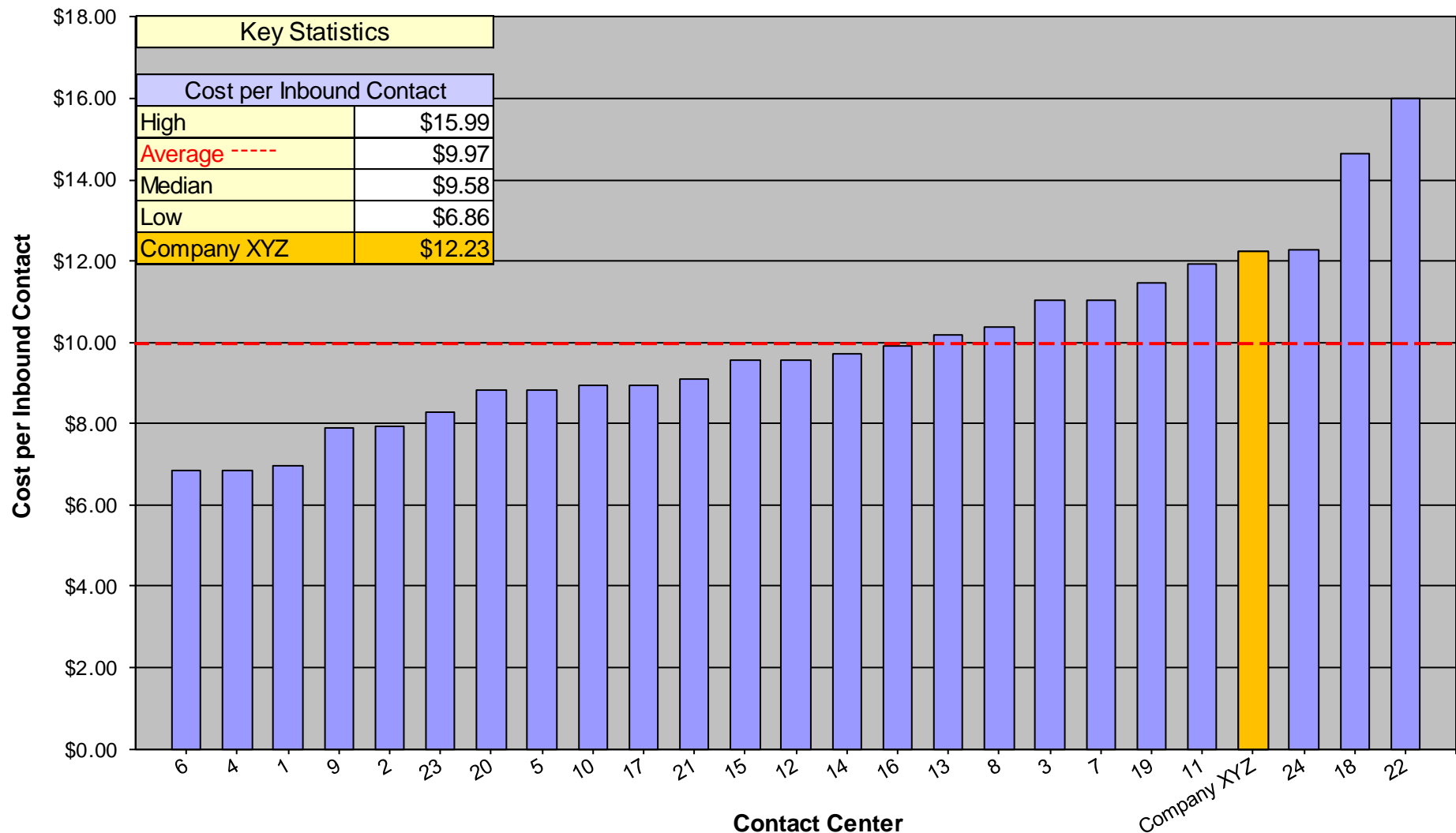
Key Correlations

Cost per Inbound Contact is strongly correlated with the following metrics:

- Agent Utilization
- Net First Contact Resolution Rate
- Inbound Contact Handle Time
- IVR Containment Rate
- Average Speed of Answer



Cost Metrics: Cost per Inbound Contact



Cost Metrics: Cost per Minute of Inbound Handle Time

Definition

Cost per Minute of Inbound Handle Time is simply the Cost per Contact divided by the average Inbound Contact Handle Time. The average Inbound Contact Handle Time includes all inbound contacts: live voice, voicemail, email, web chat, fax, walk-in, etc.

Why it's Important

Unlike Cost per Inbound Contact, which does not take into account the Contact Handle Time or call complexity, Cost per Minute of Inbound Handle Time measures the per-minute cost of providing customer support. It enables a more direct comparison of costs between Contact Centers because it is independent of the types of contacts that come into the Contact Center and the complexity of those contacts.

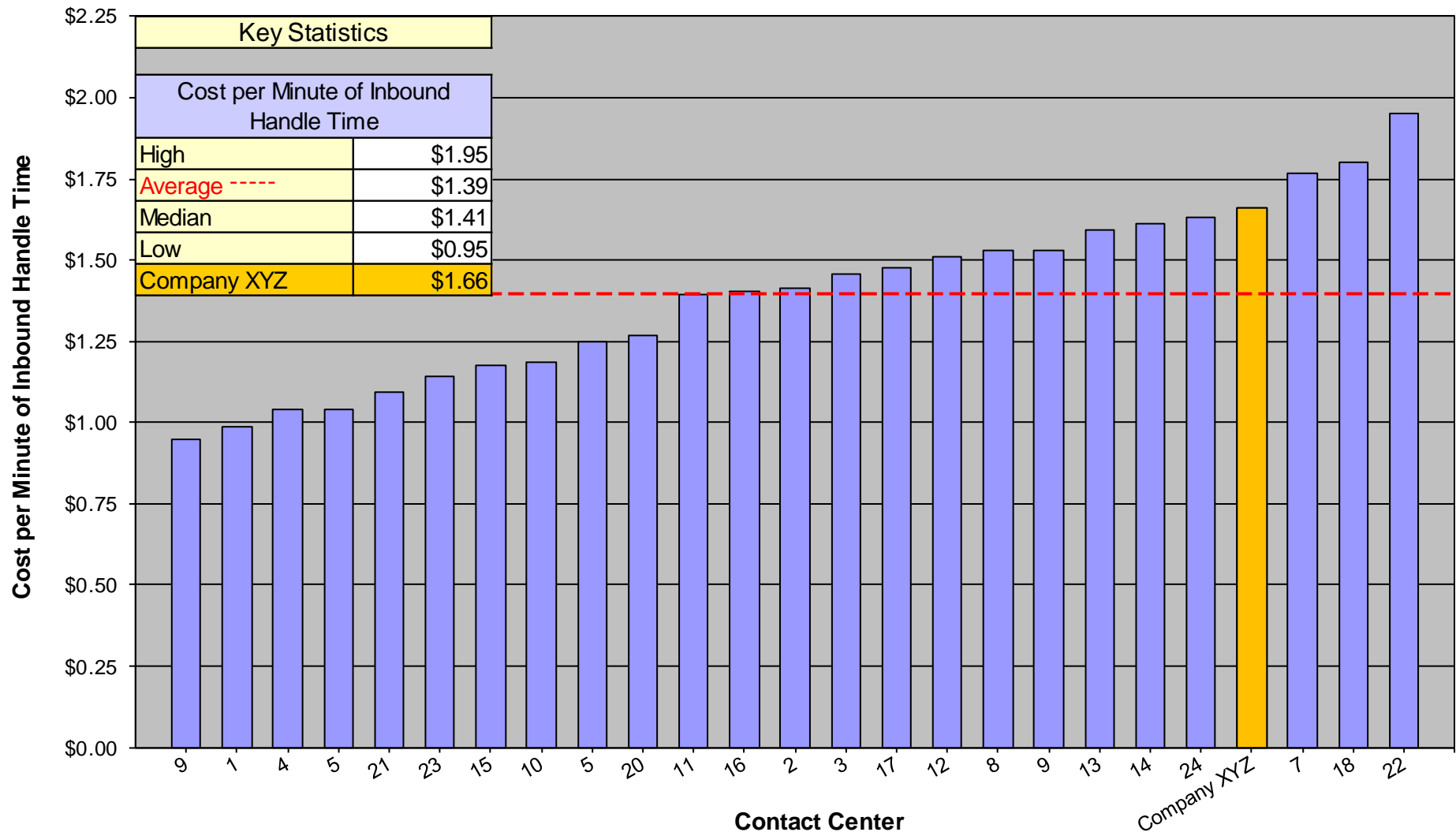
Key Correlations

Cost per Minute of Inbound Handle Time is strongly correlated with the following metrics:

- Agent Utilization
- Net First Contact Resolution Rate
- IVR Containment Rate
- Average Speed of Answer
- Outbound Contacts as a % of Total Contacts



Cost Metrics: Cost per Minute of Inbound Handle Time





Productivity Metrics



Productivity Metrics: Inbound Contacts per Agent per Month

Definition

Inbound Contacts per Agent per Month is the average monthly inbound contact volume divided by the average Full Time Equivalent (FTE) agent headcount. Contact volume includes contacts from all sources: live voice, voicemail, email, web chat, fax, walk-in, etc. Agent headcount is the average FTE number of employees and contractors handling customer contacts.

Why it's Important

Inbound Contacts per Agent per Month is an important indicator of agent productivity. A low number could indicate low Agent Utilization, poor scheduling efficiency or schedule adherence, or a higher-than-average Contact Handle Time. Conversely, a high number of inbound contacts per agent may indicate high Agent Utilization, good scheduling efficiency and schedule adherence, or a lower-than-average Contact Handle Time. Every Contact Center should track and trend this metric on a monthly basis.

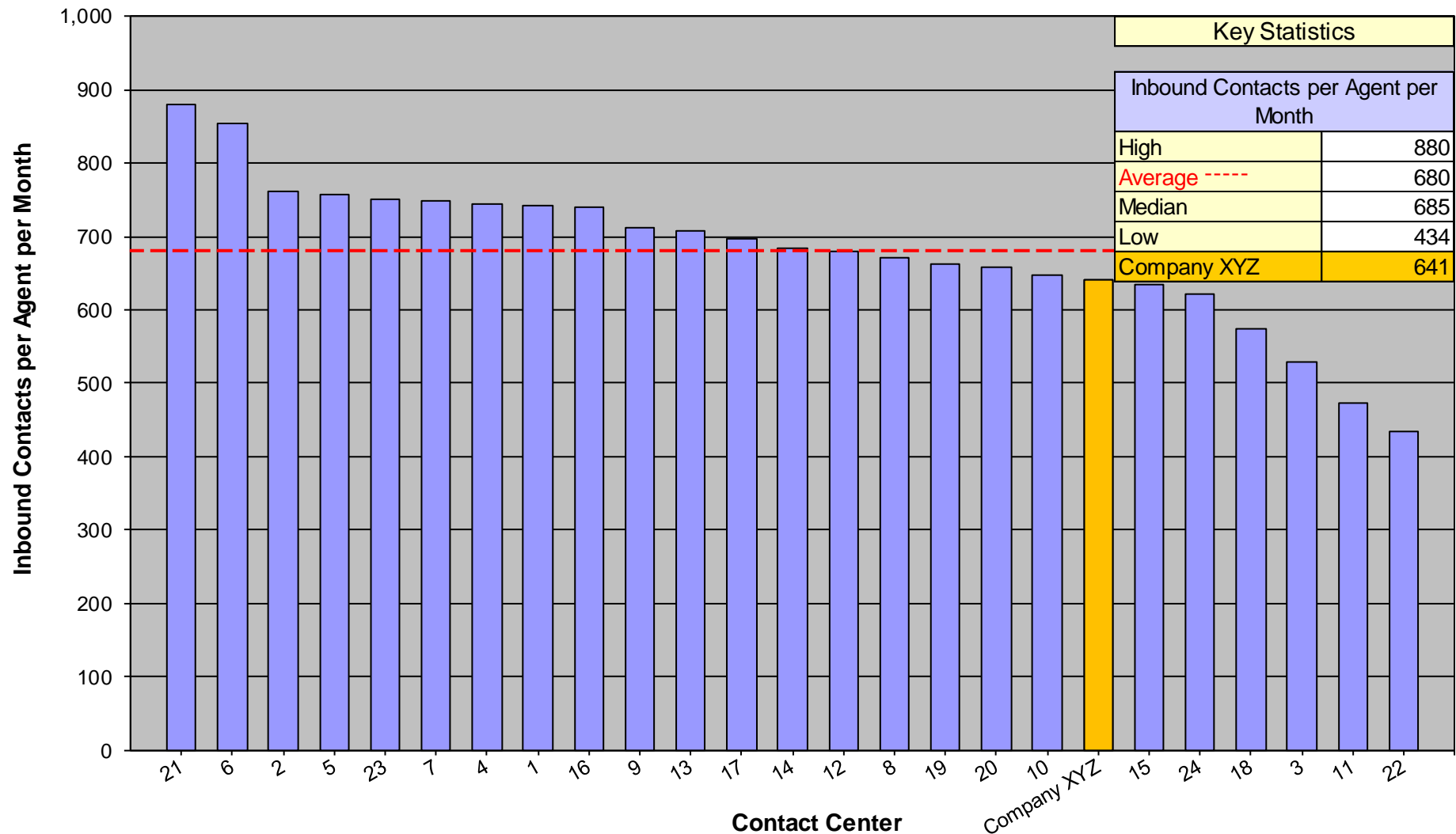
Key Correlations

Inbound Contacts per Agent per Month is strongly correlated with the following metrics:

- Agent Utilization
- Inbound Contact Handle Time
- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Agent Occupancy
- Average Speed of Answer



Productivity Metrics: Inbound Contacts per Agent per Month



Productivity Metrics: Outbound Contacts per Agent per Month

Definition

Outbound Contacts per Agent per Month is the average monthly outbound contact volume divided by the average Full Time Equivalent (FTE) agent headcount. Outbound contacts can include callbacks to customers who have left voice messages or sent emails, or callbacks to deliver information and solutions to customers who had previously called in. Agent headcount is the average FTE number of employees and contractors handling customer contacts.

Why it's Important

While Outbound Contacts per Agent per Month is technically a productivity metric, it's most important as an indicator of Contact Center effectiveness (quality of performance). The most effective Contact Centers have high Net First Contact Resolution Rates and therefore have low outbound call volumes.

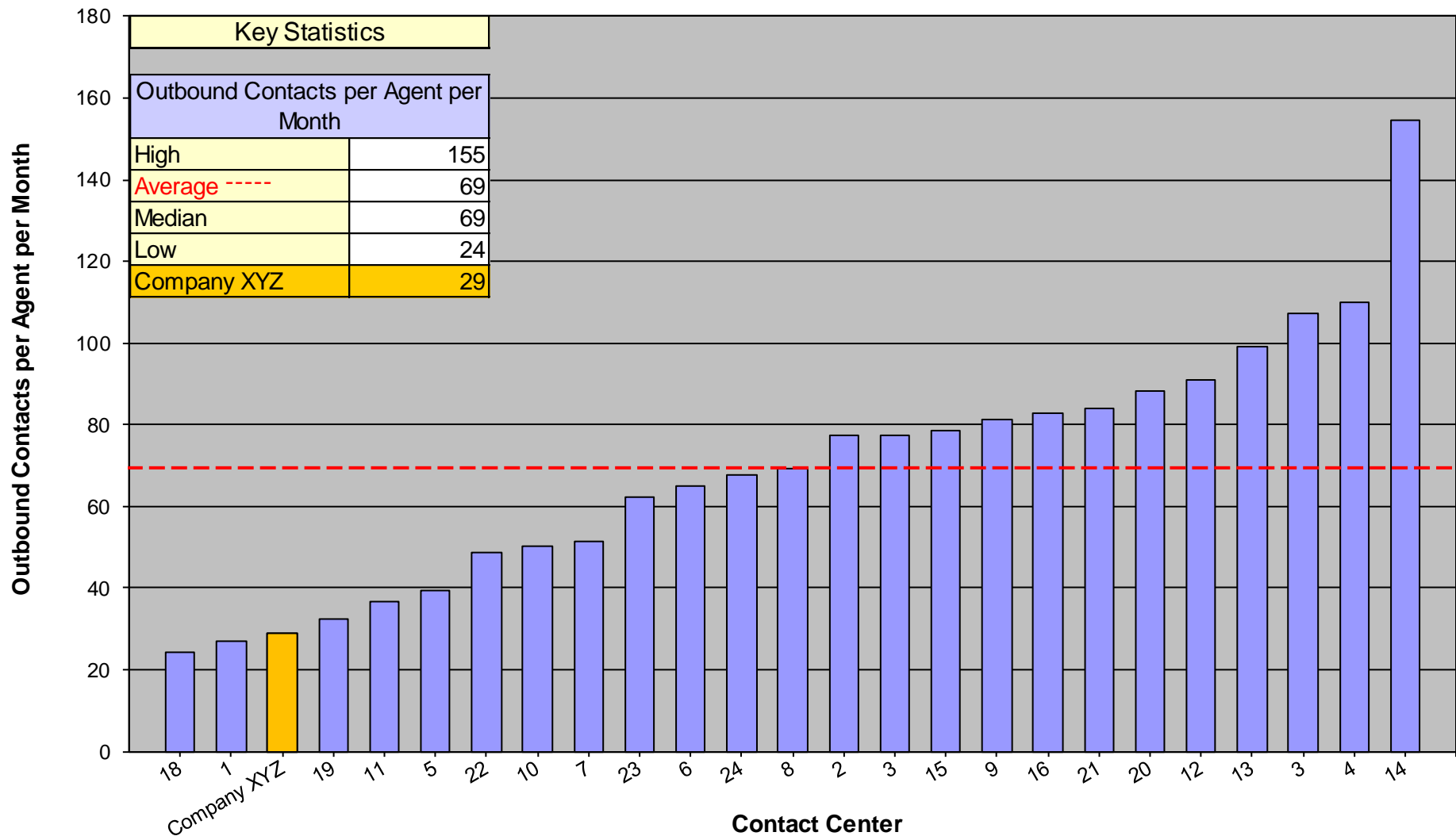
Key Correlations

Outbound Contacts per Agent per Month is strongly correlated with the following metrics:

- Net First Contact Resolution Rate
- Customer Satisfaction
- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Agent Utilization



Productivity Metrics: Outbound Contacts per Agent per Month



Productivity Metrics: Agent Utilization

Definition

Agent Utilization is the average time that an agent spends handling both inbound and outbound contacts per month, divided by the number of work hours in a given month. The calculation for Agent Utilization is shown on the next page.

Why it's Important

Agent Utilization is the single most important indicator of agent productivity. It measures the percentage of time that the average agent is in “work mode,” and is independent of Contact Handle Time or call complexity.

Key Correlations

Agent Utilization is strongly correlated with the following metrics:

- Inbound Contacts per Agent per Month
- Cost per Inbound Contact
- Cost per Minute of Inbound Handle Time
- Agent Occupancy
- Average Speed of Answer



Agent Utilization Defined

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

- Agent Utilization is a measure of the actual time that agents spend providing direct customer support in a month, divided by total time at work during the month.
- It takes into account both inbound and outbound contacts of all types handled by the agents.
- But it does not make adjustments for sick days, holidays, training time, project time, or idle time.
- By calculating Agent Utilization in this way, all Contact Centers worldwide are measured in exactly the same way, and can therefore be directly compared for benchmarking purposes.



Example: Contact 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** =

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

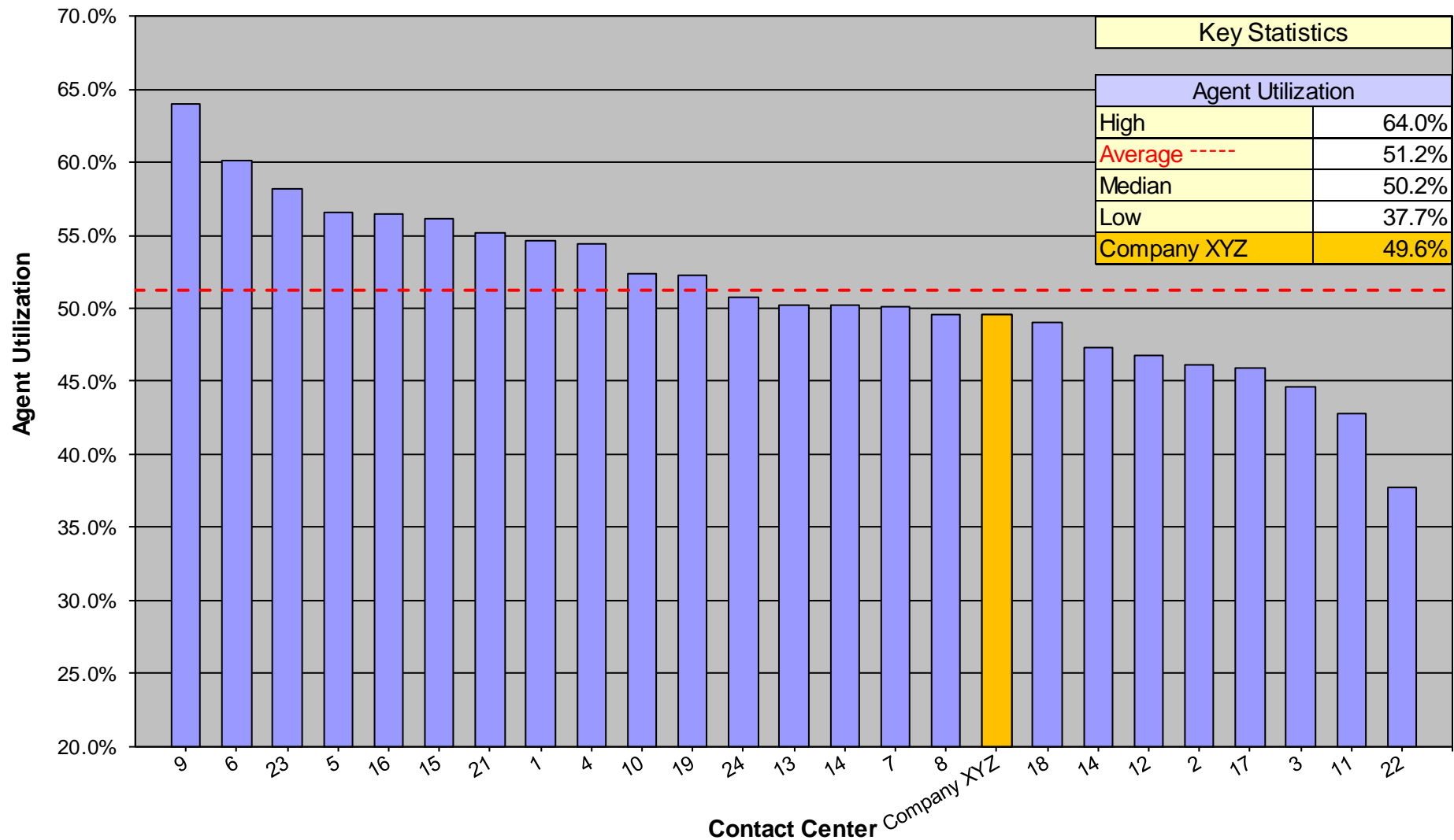
**Agent
Utilization** =

$$\frac{((375 \text{ Inbound Contacts per Month}) \times (10 \text{ minutes}) + (225 \text{ Outbound Contacts per Month}) \times (5 \text{ minutes}))}{(21.5 \text{ work days per month}) \times (7.5 \text{ work hours per day}) \times (60 \text{ minutes/hr})}$$

50.4%
**Agent
Utilization**



Productivity Metrics: Agent Utilization



Productivity Metrics: Agents as a % of Total Headcount

Definition

This metric is the average Full Time Equivalent (FTE) agent headcount divided by the average total Contact Center headcount. It is expressed as a percentage, and represents the percentage of total Contact Center personnel who are engaged in direct customer-service activities. Headcount includes both employees and contractors.

Why it's Important

The agent headcount as a percentage of total Contact Center headcount is an important measure of management and overhead efficiency. Since non-agents include both management and non-management personnel (such as supervisors and team leads, QA/QC, trainers, etc.), this metric is not a pure measure of management span of control. But it is a more useful metric than management span of control because the denominator of this ratio takes into account all personnel that are not directly engaged in customer service activities.

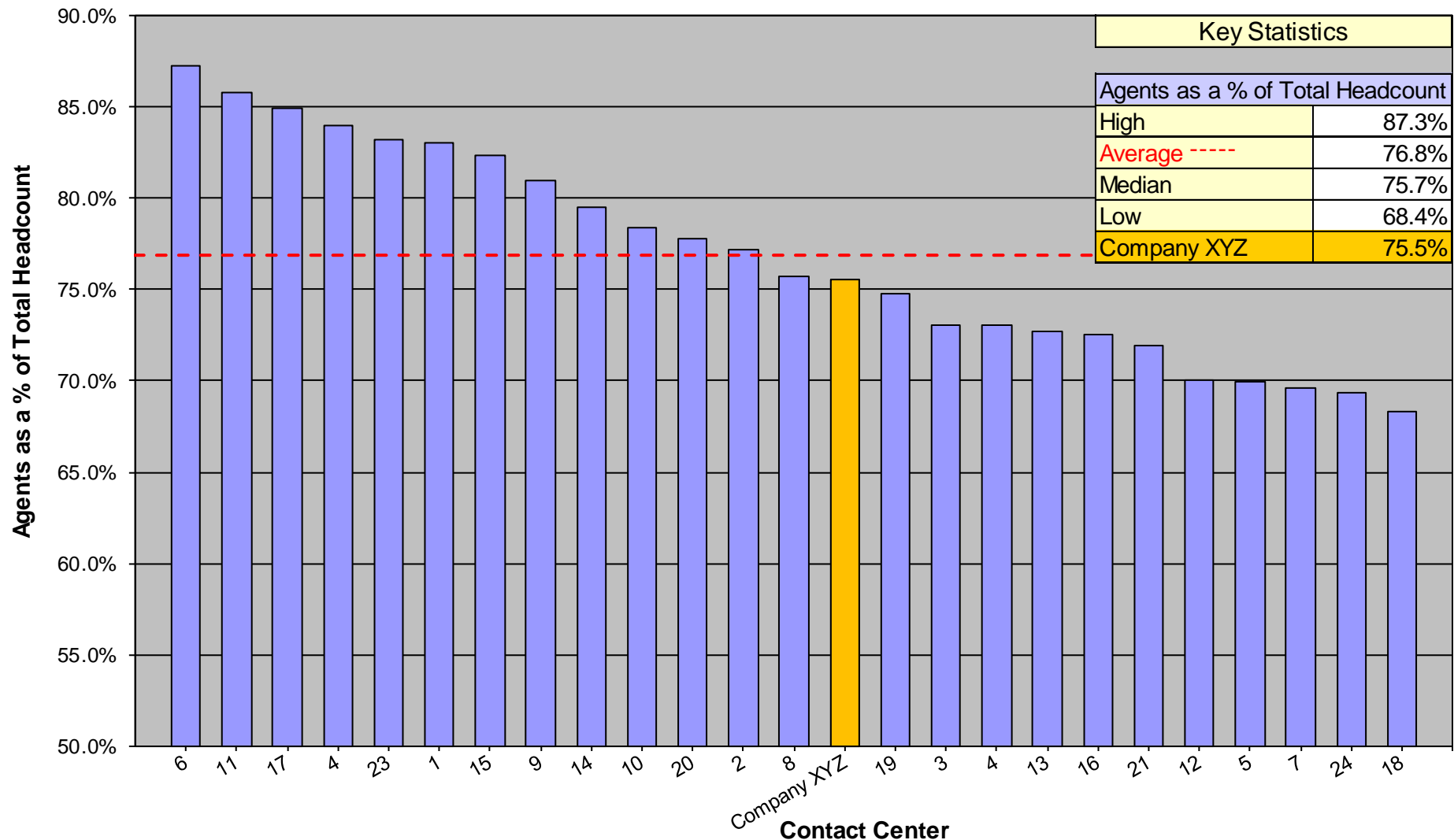
Key Correlations

Agents as a % of Total Headcount is strongly correlated with the following metrics:

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



Productivity Metrics: Agents as a % of Total Headcount





Service Level Metrics



Service Level Metrics: Average Speed of Answer

Definition

Average Speed of Answer (ASA) is the total wait time that callers are in queue, divided by the number of calls handled. This includes calls handled by an Interactive Voice Response (IVR) system, as well as calls handled by live agents. Most Automatic Call Distributor (ACD) systems measure this number.

Why it's Important

ASA is a common service-level metric in the Contact Center industry. It indicates how responsive a Contact Center is to incoming calls. Since most Contact Centers have an ASA service-level target, the ASA is tracked to ensure service-level compliance.

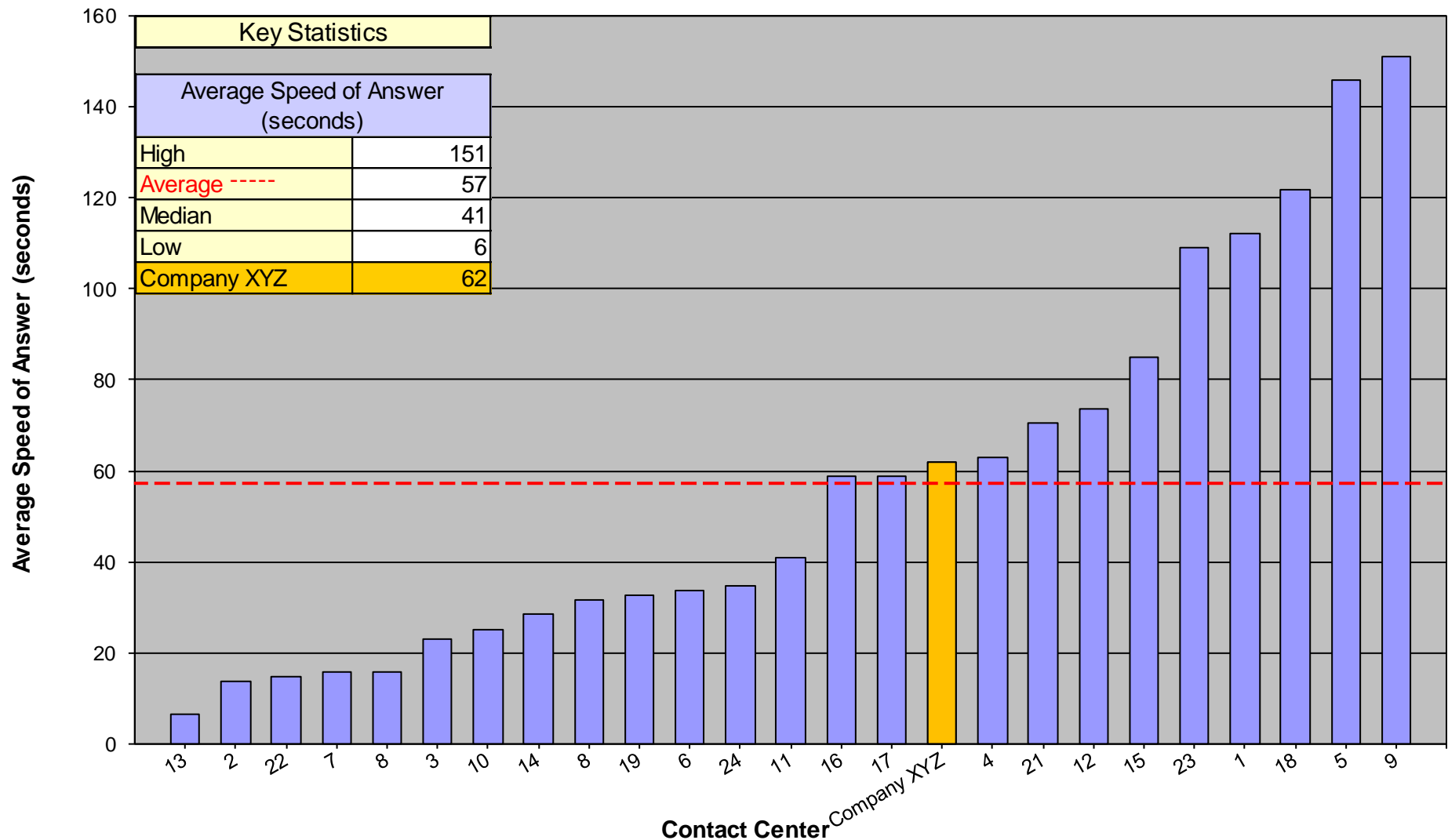
Key Correlations

Average Speed of Answer is strongly correlated with the following metrics:

- Call Abandonment Rate
- % of Calls Answered in 30 Seconds
- Agent Utilization



Service Level Metrics: Average Speed of Answer



Service Level Metrics: % of Calls Answered in 30 Seconds

Definition

This metric is fairly self-explanatory. It is the percentage of all inbound calls that are answered by a live agent within 30 seconds. For those who don't track this exact metric, but track a similar metric such as % of Calls Answered in 60 Seconds, MetricNet uses a conversion formula to calculate the equivalent percentage of calls answered within 30 seconds.

Why it's Important

% of Calls Answered in 30 Seconds is a common service-level metric in the Contact Center industry. It indicates how responsive a Contact Center is to incoming calls. Many Contact Centers have a service-level target for % of Calls Answered in 30 Seconds, so the metric is tracked to ensure service-level compliance.

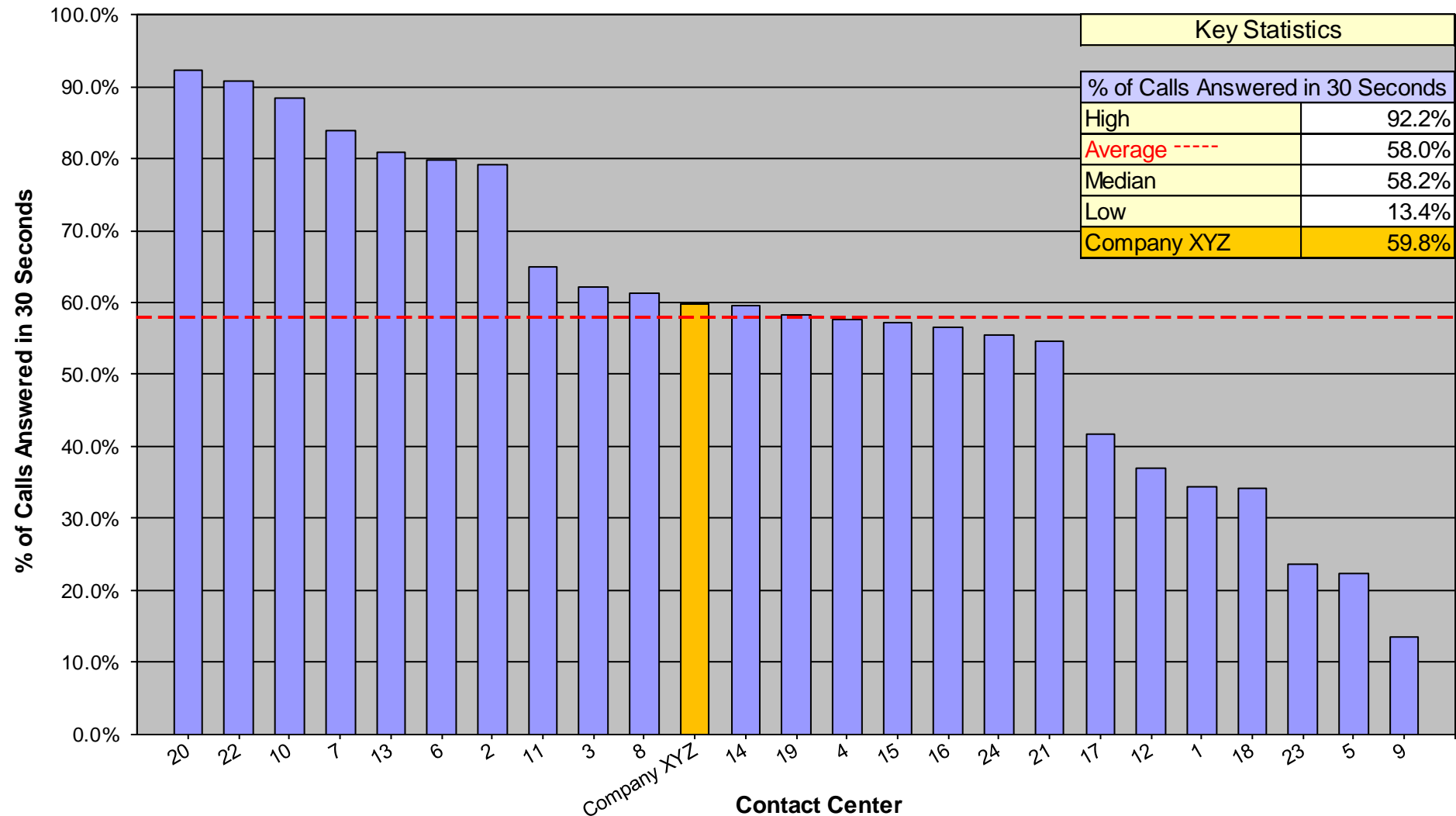
Key Correlations

% of Calls Answered Within 30 Seconds is strongly correlated with the following metrics:

- Average Speed of Answer
- Call Abandonment Rate
- Agent Utilization



Service Level Metrics: % of Calls Answered in 30 Seconds



Service Level Metrics: Call Abandonment Rate

Definition

Call Abandonment Rate is the percentage of calls that were connected to the ACD, but were disconnected by the caller before reaching an agent or before completing a process within the IVR.

Why it's Important

Call Abandonment Rate is a common service-level metric in the Contact Center industry. An abandoned call indicates that a caller gave up and hung up the phone before receiving service from a live agent or from the IVR. Since most Contact Centers have an abandonment-rate service-level target, the Call Abandonment Rate is tracked to ensure service-level compliance.

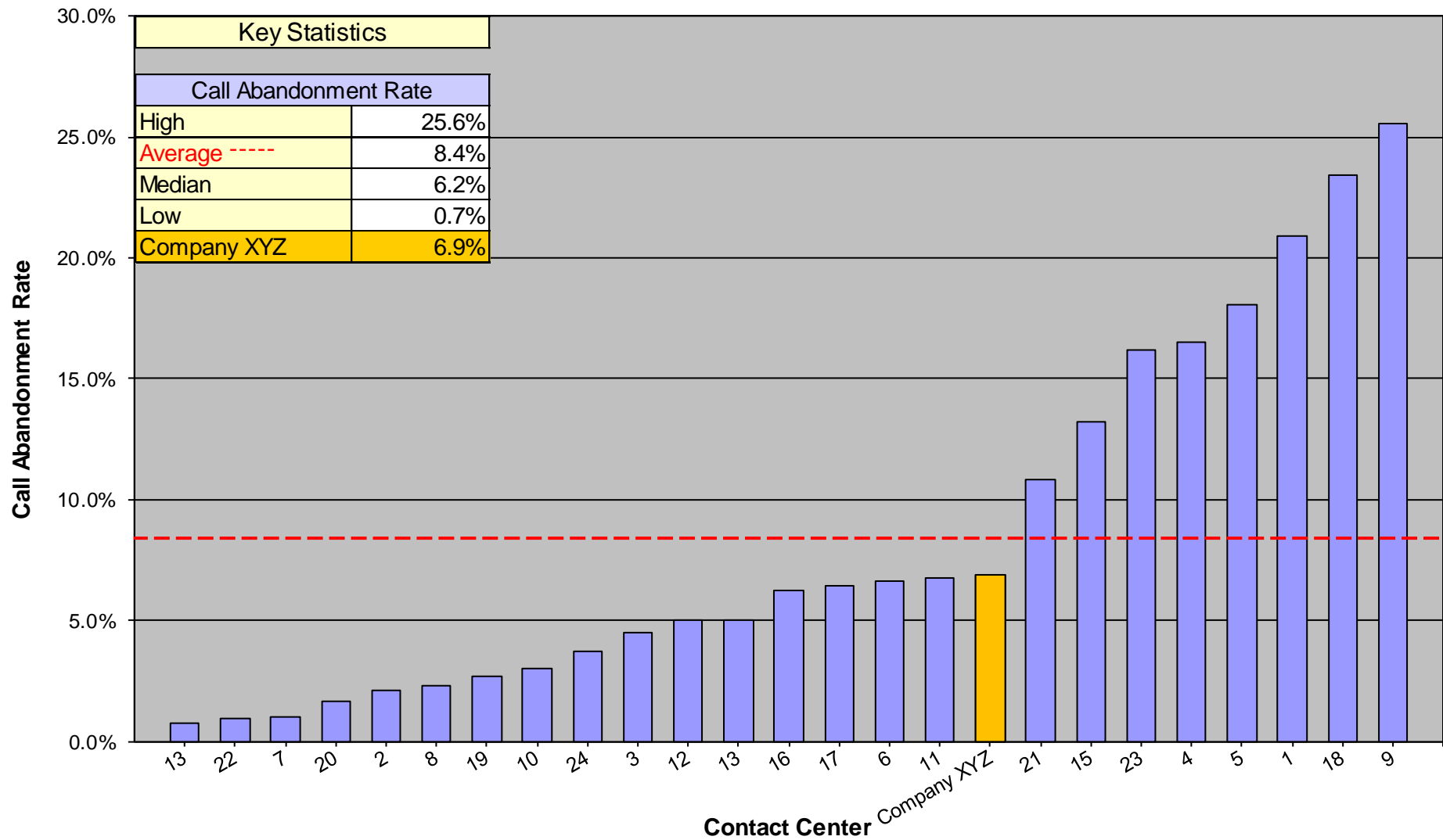
Key Correlations

Call Abandonment Rate is strongly correlated with the following metrics:

- Average Speed of Answer
- % of Calls Answered in 30 Seconds
- Agent Utilization



Service Level Metrics: Call Abandonment Rate





Quality Metrics



Quality Metrics: Call Quality

Definition

Although there is no consistent methodology for measuring Call Quality in the Contact Center industry, most Contact Centers have developed their own scoring system for grading the quality of a call. Most will measure call quality on a scale of zero to 100%, and evaluate such things as agent courtesy, professionalism, empathy, timeliness of resolution, quality of resolution, adherence to the script, etc.

Why it's Important

Call Quality is the foundation of Customer Satisfaction. Good Call Quality takes into account agent knowledge and expertise, call efficiency (i.e., call handle time), and agent courtesy and professionalism. Unless Call Quality is consistently high, it is difficult to achieve consistently high levels of Customer Satisfaction. When measured properly, Call Quality and Customer Satisfaction should track fairly closely.

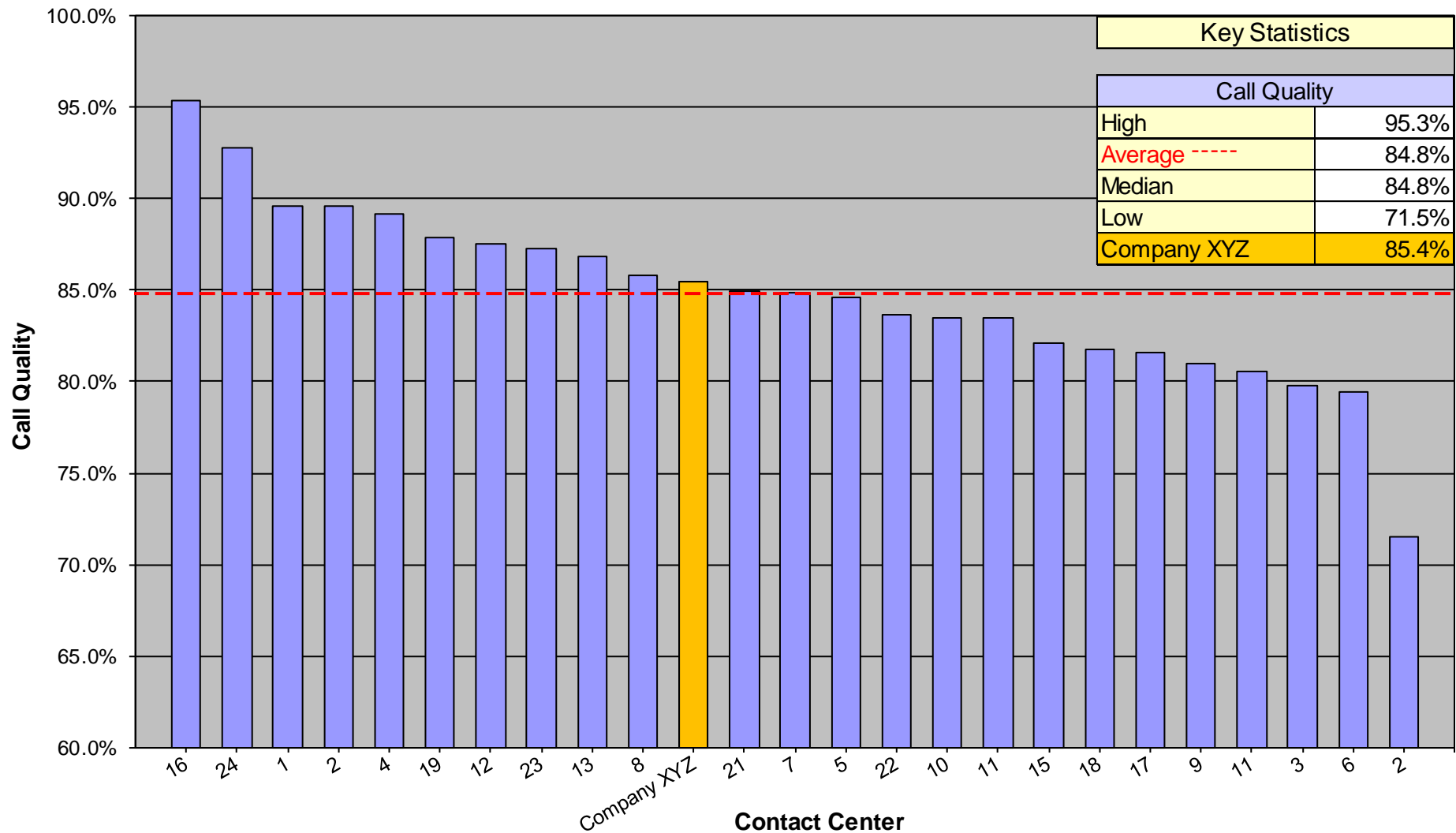
Key Correlations

Call Quality is strongly correlated with the following metrics:

- Customer Satisfaction
- Net First Contact Resolution Rate
- New Agent Training Hours
- Annual Agent Training Hours



Quality Metrics: Call Quality



Quality Metrics: Net First Contact Resolution Rate

Definition

Net First Contact Resolution (FCR) applies only to live (telephone or chat) contacts. It is a percentage, equal to the number of inbound calls that are resolved on the first interaction with the customer, divided by all calls that are potentially resolvable on first contact. Some Contact Centers include email in their FCR Rate by considering an email resolved on first contact if the customer receives a resolution within one hour of submitting the email.

Why it's Important

Net First Contact Resolution is the single biggest driver of Customer Satisfaction. A high Net FCR Rate is almost always associated with high levels of Customer Satisfaction. Contact Centers that emphasize training (i.e., high training hours for new and veteran agents) and have good technology tools, such as knowledge management, generally enjoy a higher-than-average Net FCR Rate.

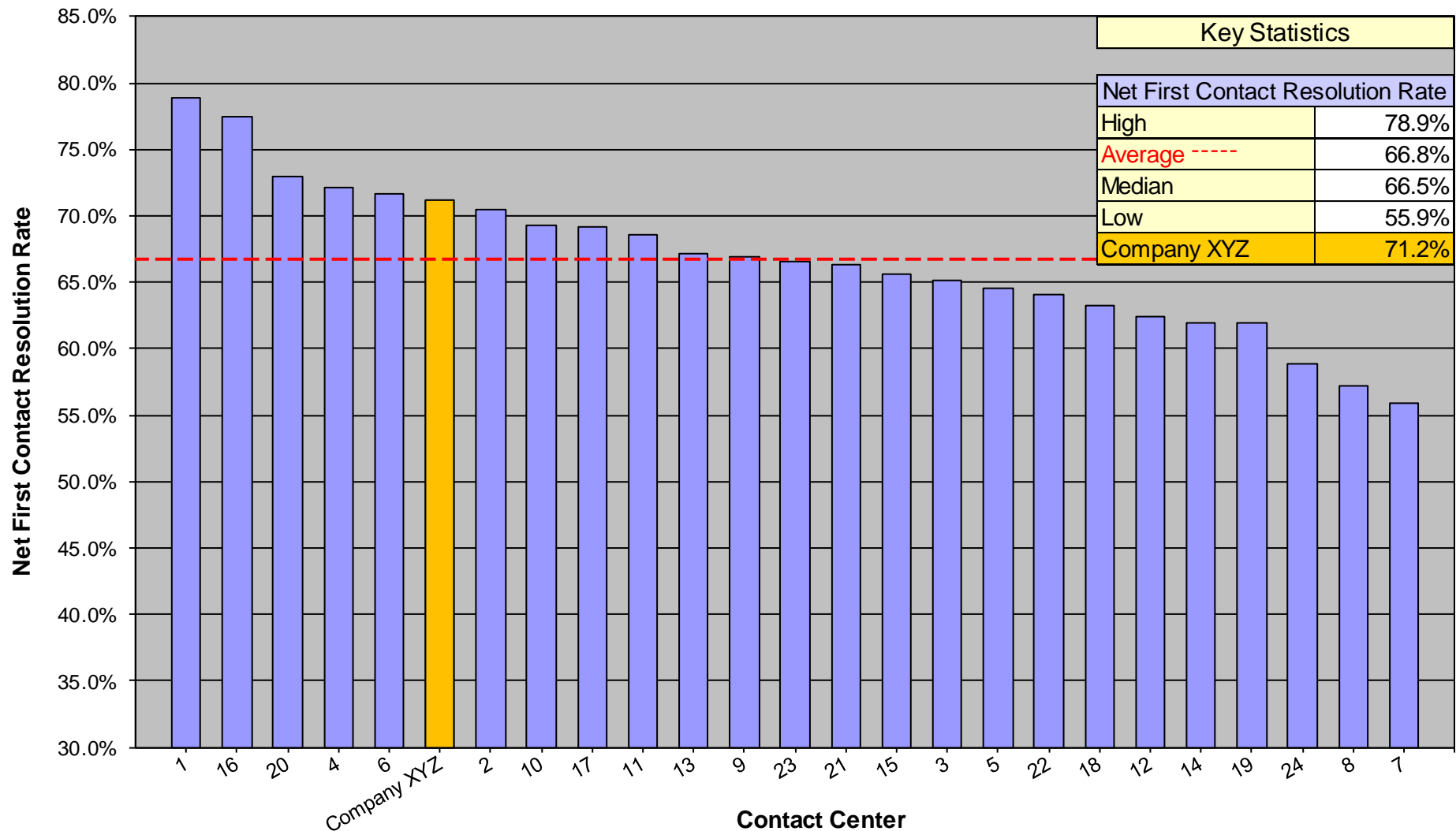
Key Correlations

Net First Contact Resolution is strongly correlated with the following metrics:

- Customer Satisfaction
- New Agent Training Hours
- Annual Agent Training Hours
- Inbound Contact Handle Time



Quality Metrics: Net First Contact Resolution Rate



Quality Metrics: Customer Satisfaction

Definition

Customer Satisfaction is the percentage of customers who are either satisfied or very satisfied with their Contact Center experience. This metric can be captured in a number of ways, including automatic after-call IVR surveys, follow-up outbound (live-agent) calls, email surveys, etc.

Why it's Important

Customer Satisfaction is the single most important measure of Contact Center quality. Any successful Contact Center will have consistently high Customer Satisfaction ratings. Some are under the impression that a low Cost per Contact may justify a lower level of Customer Satisfaction. But this is not true. MetricNet's research shows that even Contact Centers with a very low Cost per Contact can achieve consistently high Customer Satisfaction ratings.

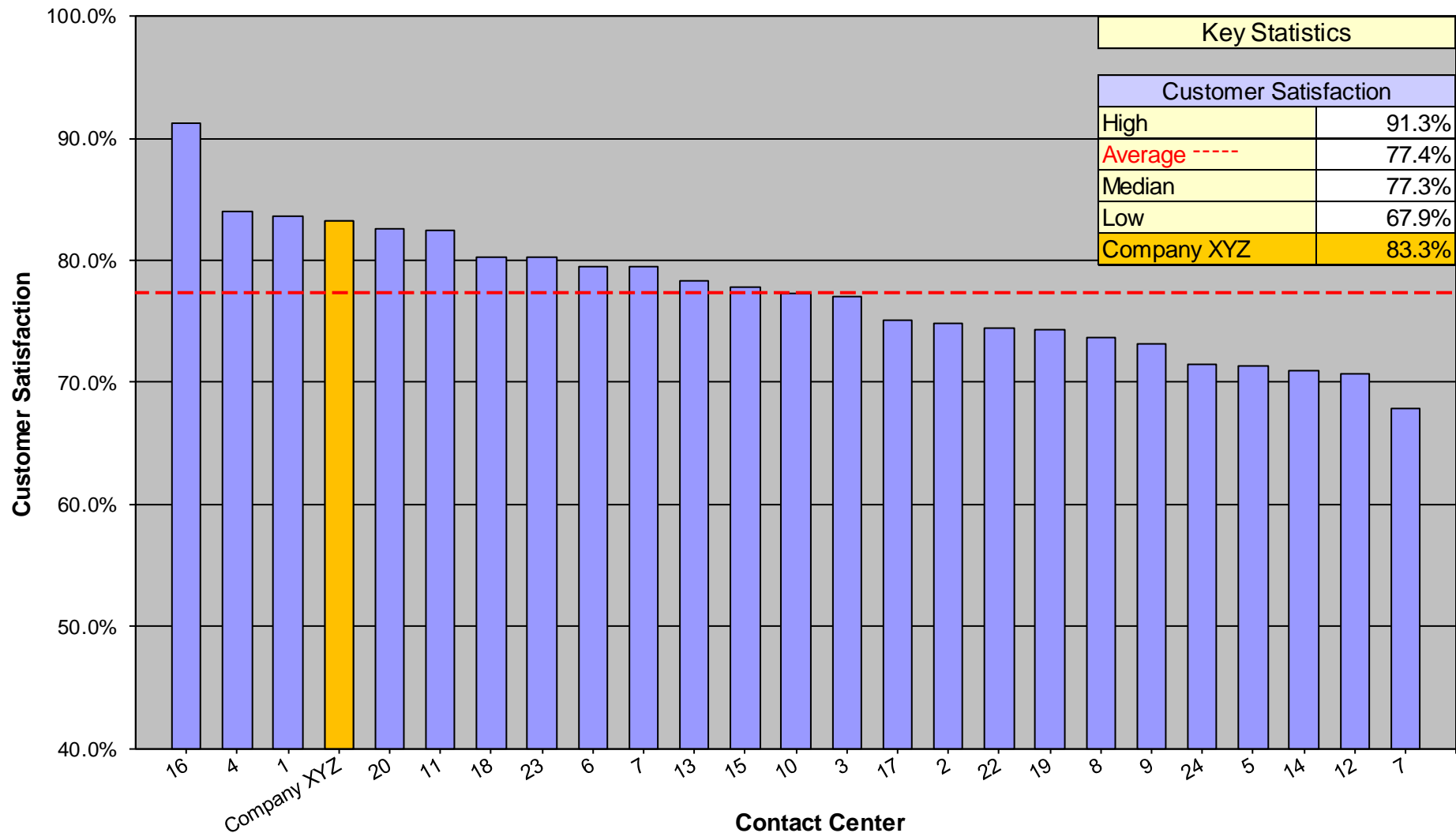
Key Correlations

Customer Satisfaction is strongly correlated with the following metrics:

- Net First Contact Resolution Rate
- Call Quality



Quality Metrics: Customer Satisfaction





Agent Metrics



Agent Metrics: Annual Agent Turnover

Definition

Annual Agent Turnover is the average percentage of agents that leave the Contact Center, for any reason (voluntarily or involuntarily), in a year.

Why it's Important

Agent turnover is costly. Each time an agent leaves the Contact Center, a new agent needs to be hired to replace the outgoing agent. This results in costly recruiting, hiring, and training expenses. Additionally, it is typically several weeks or even months before an agent is fully productive, so there is lost productivity associated with agent turnover as well. High agent turnover is generally associated with low agent morale in a Contact Center.

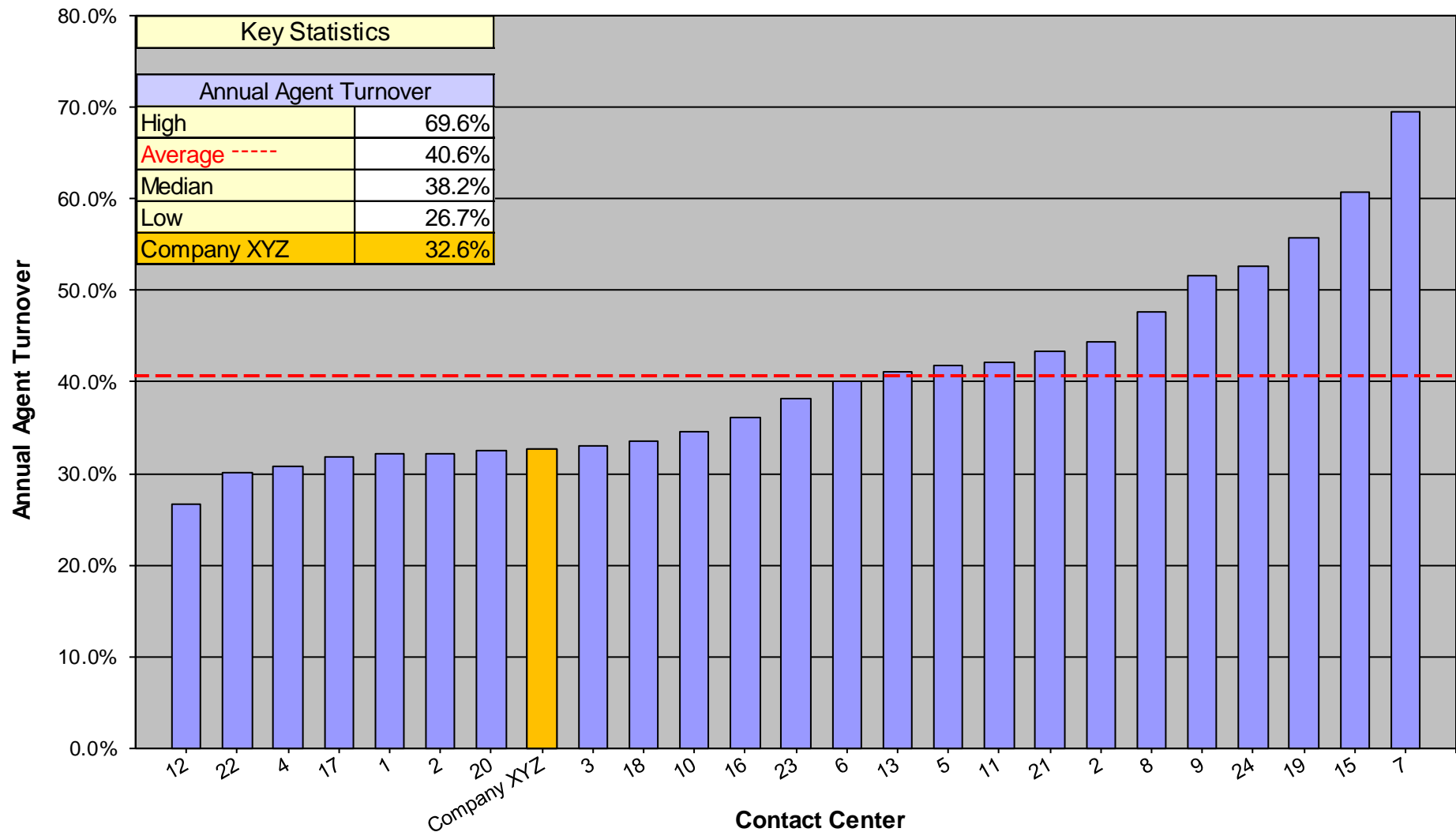
Key Correlations

Annual Agent Turnover is strongly correlated with the following metrics:

- Daily Agent Absenteeism
- Annual Agent Training Hours
- Customer Satisfaction
- Net First Contact Resolution Rate
- Cost per Inbound Contact
- Agent Job Satisfaction



Agent Metrics: Annual Agent Turnover



Agent Metrics: Daily Agent Absenteeism

Definition

Daily Agent Absenteeism is the average percentage of agents with an unexcused absence on any given day. It is calculated by dividing the average number of unexcused absent agents per day by the average total number of agents per day that are scheduled to be at work.

Why it's Important

High Agent Absenteeism is problematic because it makes it difficult for a Contact Center to schedule resources efficiently. High absenteeism can severely harm a Contact Center's operating performance and increase the likelihood that service-level targets will be missed. A Contact Center's Average Speed of Answer and Call Abandonment Rate typically suffer when absenteeism is high. Also, chronically high absenteeism is often a sign of low agent morale.

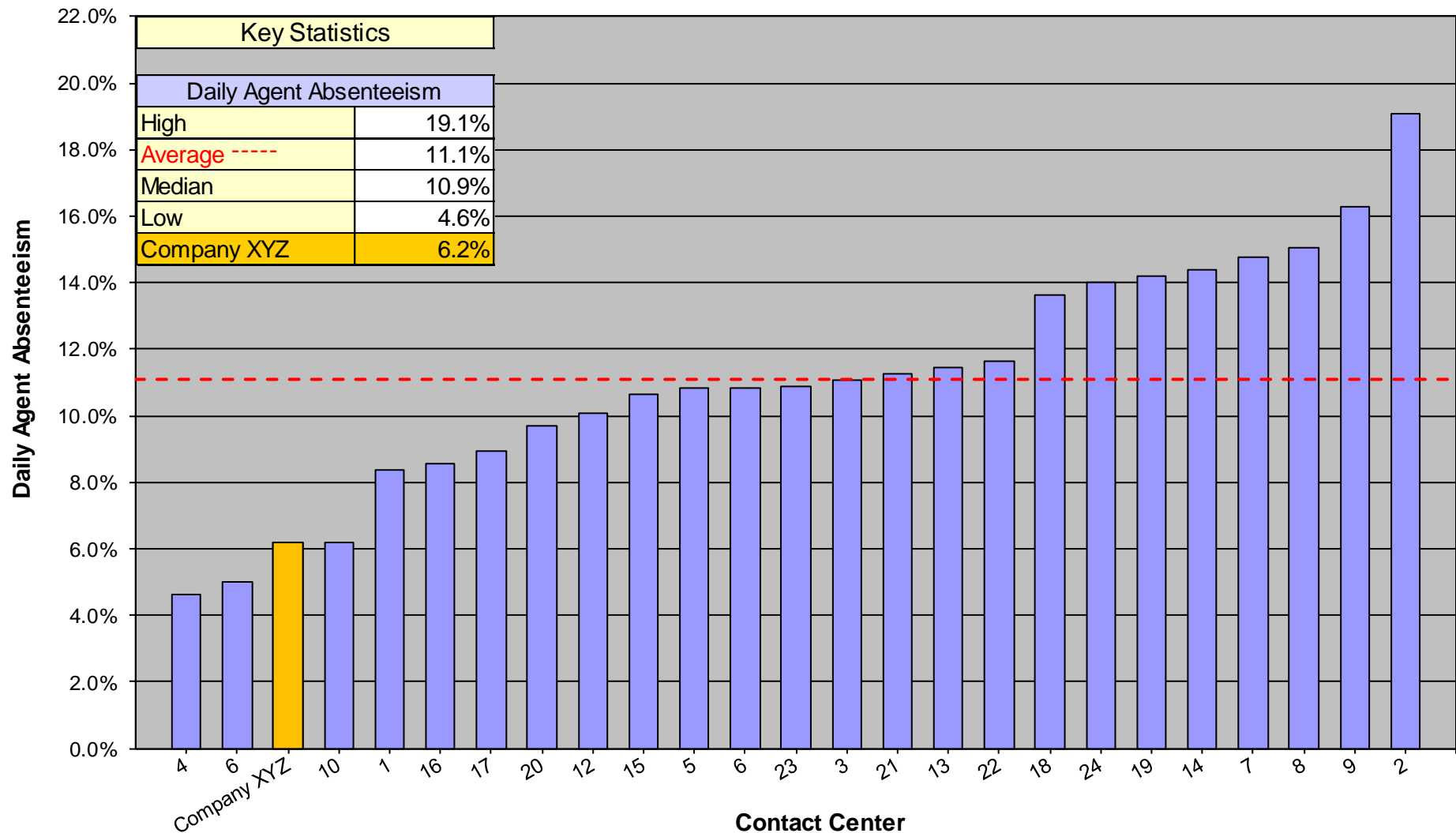
Key Correlations

Daily Agent Absenteeism is strongly correlated with the following metrics:

- Annual Agent Turnover
- Agent Job Satisfaction
- Agent Utilization
- Cost per Inbound Contact
- Inbound Contacts per Agent per Month



Agent Metrics: Daily Agent Absenteeism



Agent Metrics: Agent Occupancy

Definition

Agent Occupancy is a percentage, equal to the amount of time that an agent is in his or her seat and connected to the ACD and either engaged in a call or ready to answer a call, divided by the agent's total number of hours at work (excluding break time and lunch time).

Why it's Important

Agent Occupancy is an indirect measure of agent productivity and Agent Schedule Adherence. High levels of Agent Occupancy indicate an orderly, disciplined work environment. Conversely, low levels of Agent Occupancy are often accompanied by a chaotic, undisciplined work environment. Agent Occupancy and Agent Utilization are sometimes confused. Although Agent Occupancy and Agent Utilization are correlated, they are very different metrics. It is possible to have a high occupancy (when agents are logged into the ACD a large percentage of the time) but a low Agent Utilization (when few calls are coming in).

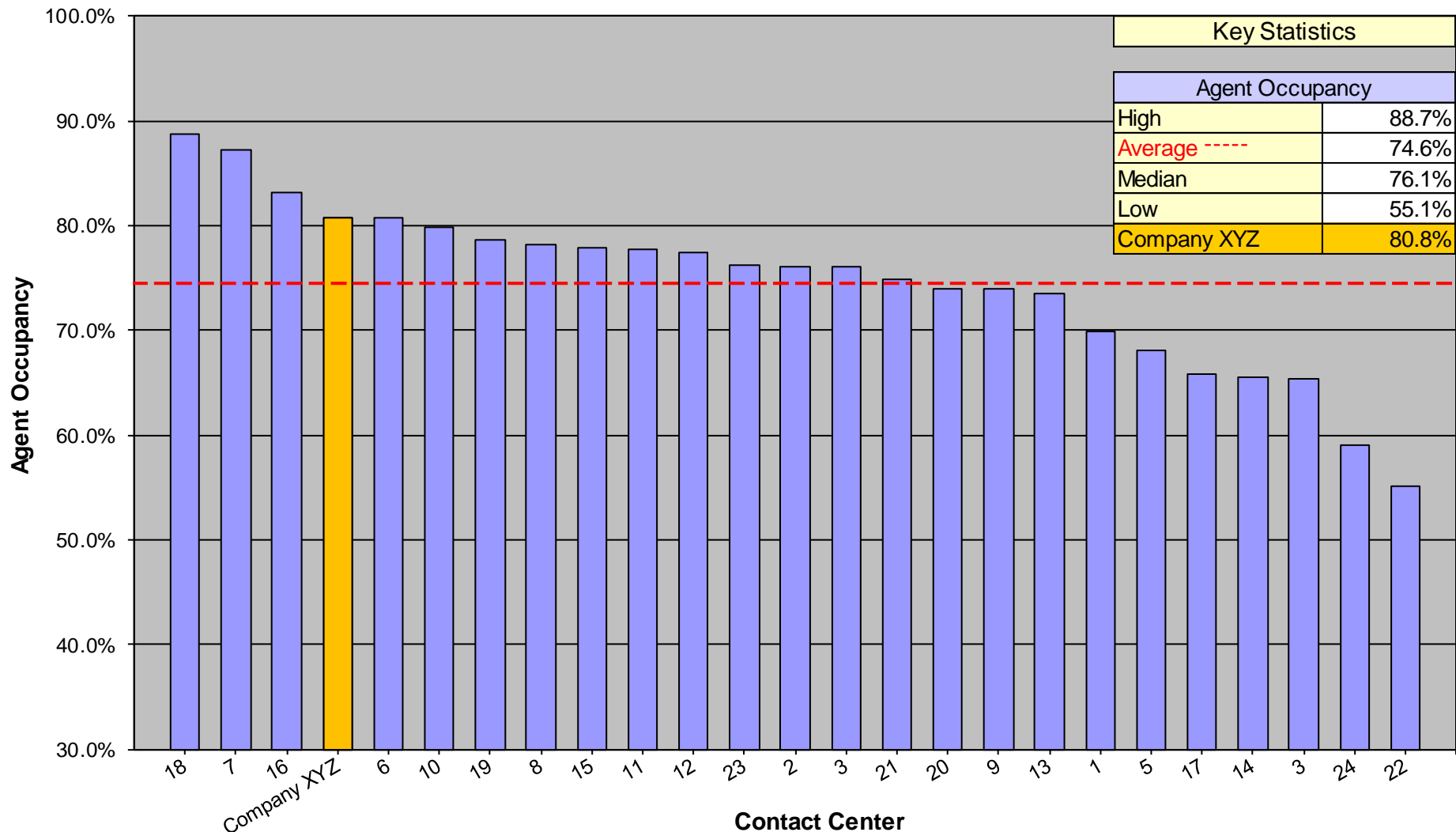
Key Correlations

Agent Occupancy is strongly correlated with the following metrics:

- Agent Utilization
- Inbound Contacts per Agent per Month
- Agent Schedule Adherence
- Cost per Inbound Contact



Agent Metrics: Agent Occupancy



Agent Metrics: Agent Schedule Adherence

Definition

Agent Schedule Adherence measures whether agents are in their seats ready to accept calls as scheduled. That is, it measures how well a Contact Center's agents are "adhering" to the schedule. Agent Schedule Adherence is equal to the actual time that an agent is logged in to the system ready to accept calls, divided by the total time the agent is scheduled to be available to accept calls.

Why it's Important

Effective agent scheduling is critical to achieving a Contact Center's service-level goals and maximizing Agent Utilization. But a work schedule, no matter how well constructed, is only as good as the adherence to the schedule. It is therefore important for agents to adhere to the schedule as closely as possible to ensure that these productivity and service-level goals are met.

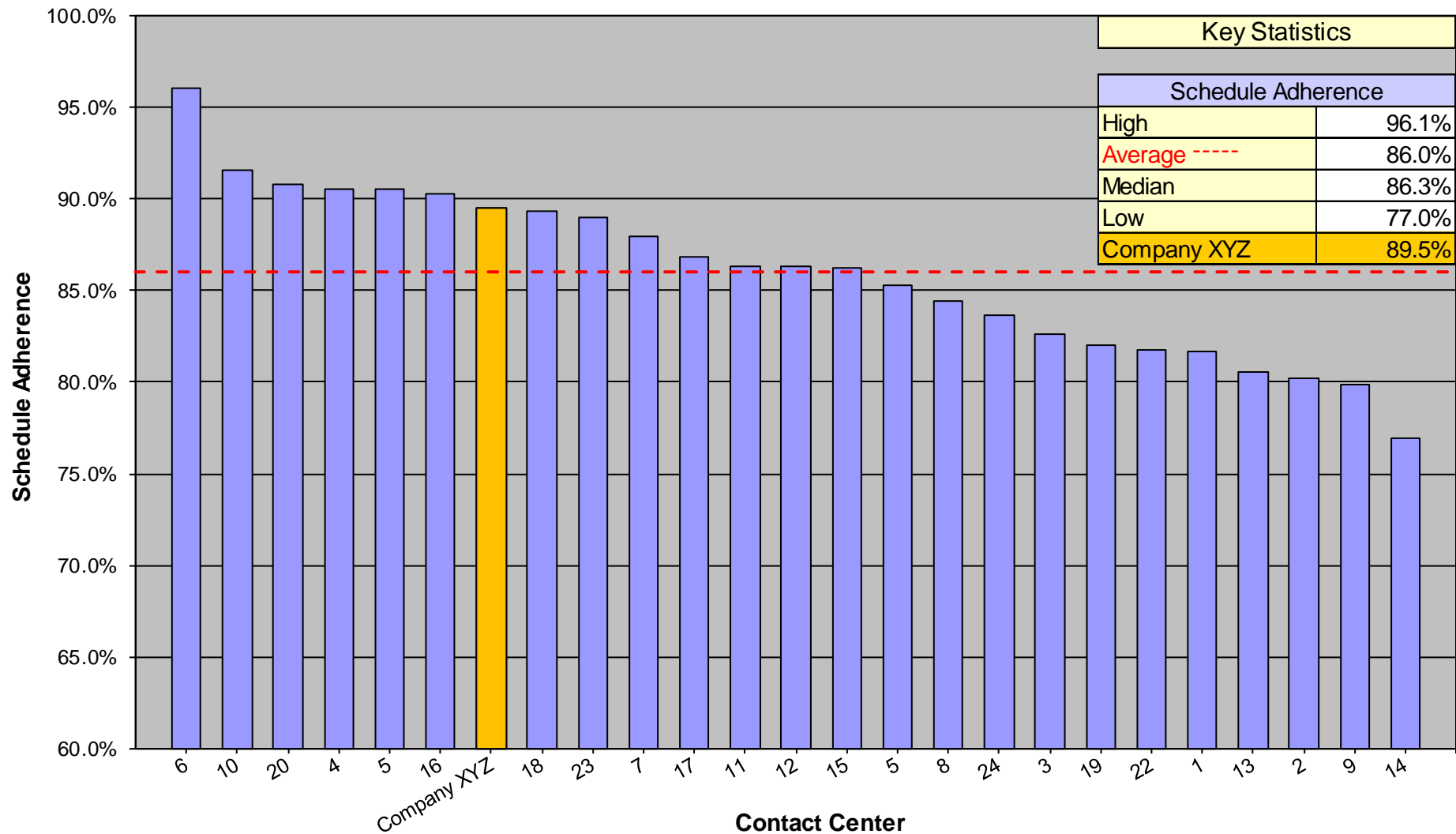
Key Correlations

Agent Schedule Adherence is strongly correlated with the following metrics:

- Agent Utilization
- Inbound Contacts per Agent per Month
- Agent Occupancy
- Average Speed of Answer



Agent Metrics: Agent Schedule Adherence



Agent Metrics: New Agent Training Hours

Definition

The name of this metric is somewhat self-explanatory. New Agent Training Hours is the number of training hours (including classroom, computer-based training, self-study, shadowing, being coached, and on-the-job training) that a new agent receives before he or she is allowed to handle customer contacts independently.

Why it's Important

New Agent Training Hours are strongly correlated with Call Quality and Net First Contact Resolution Rate, especially during an agent's first few months on the job. The more training that new agents receive, the higher that Call Quality and Net FCR will typically be. This, in turn, has a positive effect on many other performance metrics including Customer Satisfaction. Perhaps most importantly, training levels strongly impact agent morale—agents who receive more training typically have higher levels of job satisfaction.

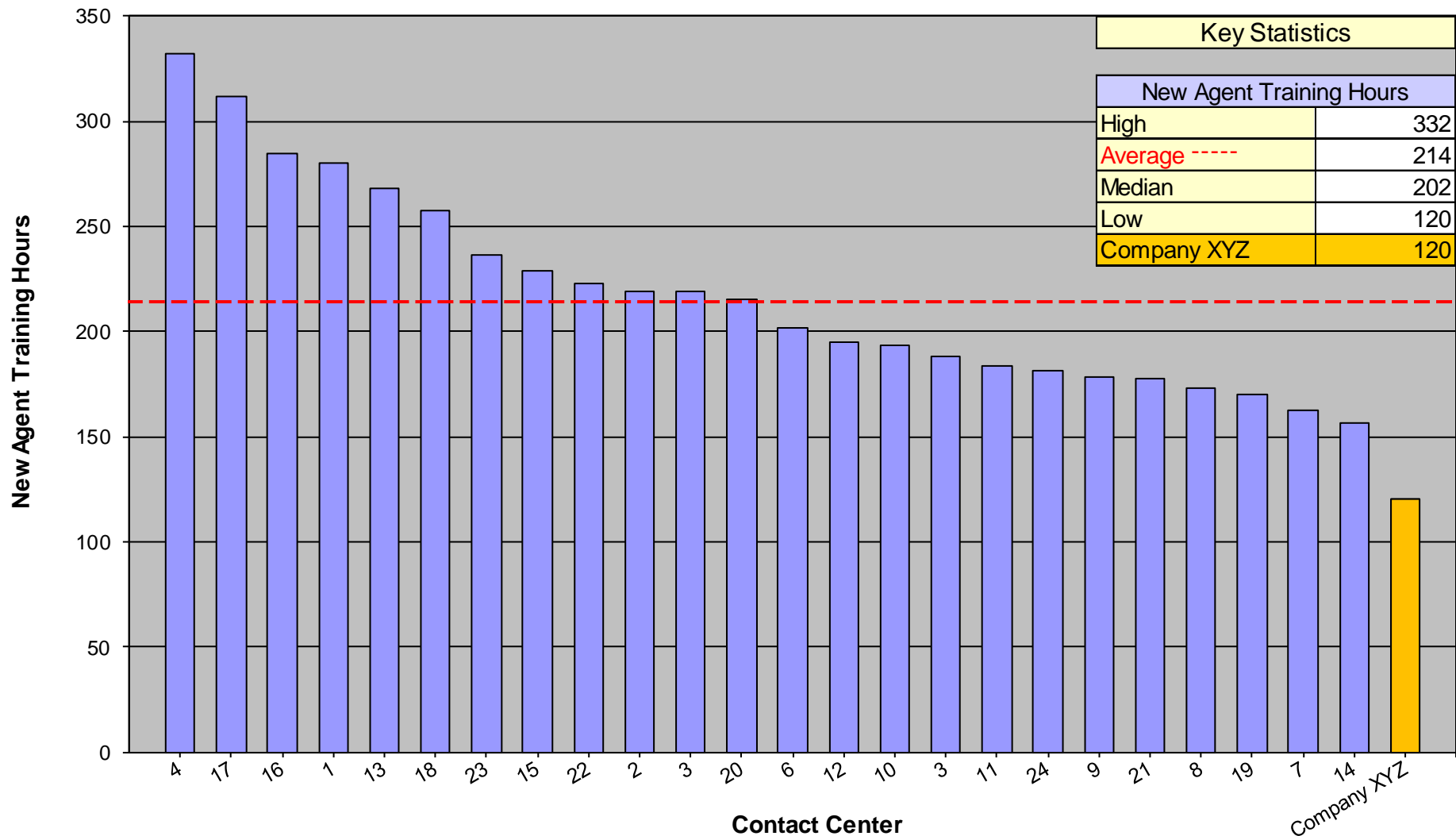
Key Correlations

New Agent Training Hours are strongly correlated with the following metrics:

- Call Quality
- Net First Contact Resolution Rate
- Customer Satisfaction
- Inbound Contact Handle Time
- Agent Job Satisfaction



Agent Metrics: New Agent Training Hours



Agent Metrics: Annual Agent Training Hours

Definition

Annual Agent Training Hours is the average number of training hours (including classroom, computer-based training, self-study, shadowing, etc.) that an agent receives on an annual basis. This number includes any training hours that an agent receives that are not part of the agent's initial (new-agent) training. But it does not include routine team meetings, shift handoffs, or other activities that do not involve formal training.

Why it's Important

Annual Agent Training Hours are strongly correlated with Call Quality, Net First Contact Resolution Rate, and Customer Satisfaction. Perhaps most importantly, training levels strongly impact agent morale—agents who receive more training typically have higher levels of job satisfaction.

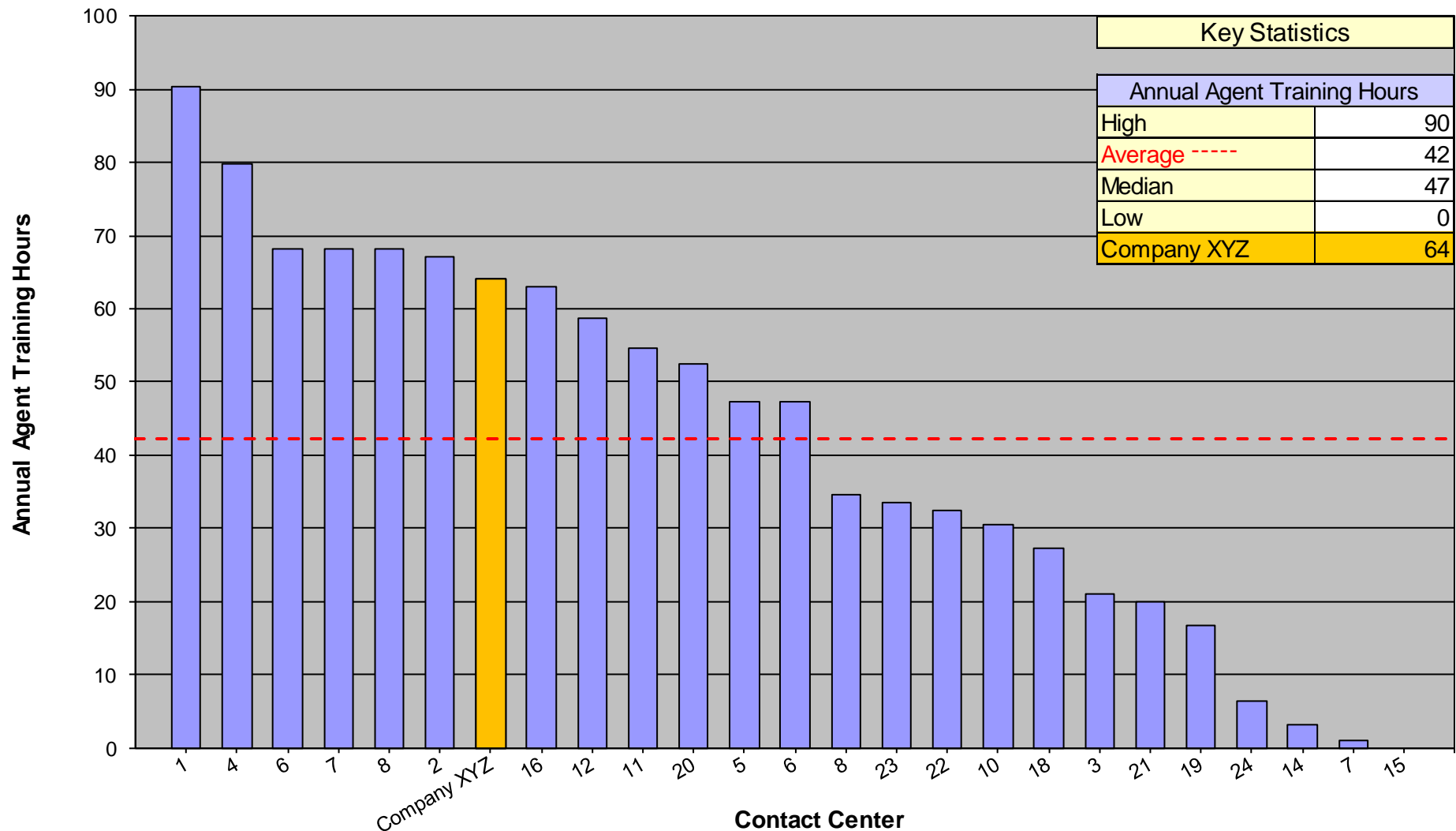
Key Correlations

Annual Agent Training Hours are strongly correlated with the following metrics:

- Call Quality
- Net First Contact Resolution Rate
- Customer Satisfaction
- Inbound Contact Handle Time
- Agent Job Satisfaction



Agent Metrics: Annual Agent Training Hours



Agent Metrics: Agent Tenure

Definition

Agent Tenure is the average number of months that each agent has worked on a particular Contact Center.

Why it's Important

Agent Tenure is a measure of agent experience. Almost every metric related to Contact Center cost and quality is impacted by the level of experience the agents have.

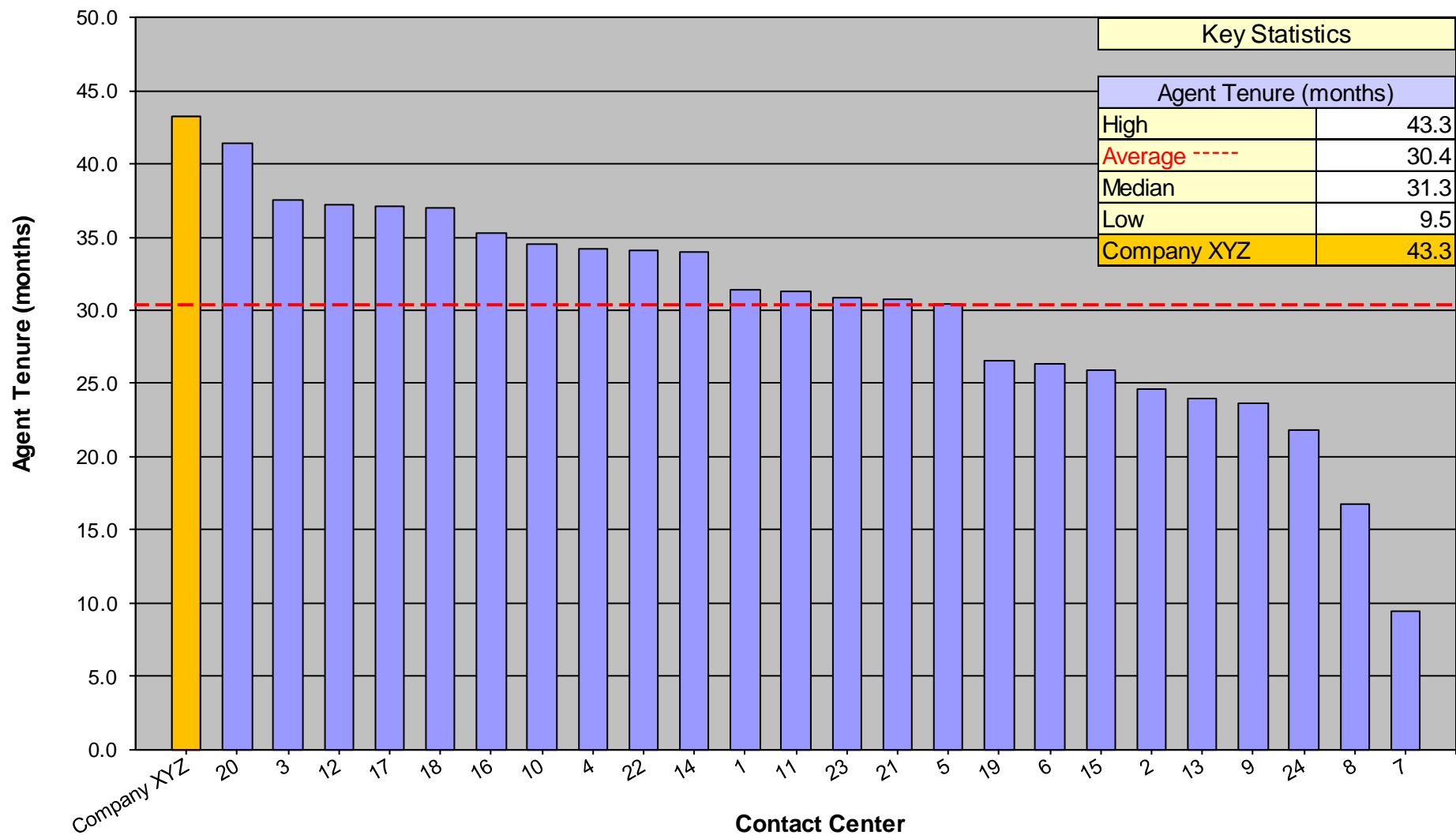
Key Correlations

Agent Tenure is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Annual Agent Turnover
- Inbound Contact Handle Time
- Call Quality
- Annual Agent Training Hours
- Net First Contact Resolution Rate
- Customer Satisfaction
- Agent Coaching Hours
- Agent Job Satisfaction



Agent Metrics: Agent Tenure



Agent Metrics: Agent Job Satisfaction

Definition

Agent Job Satisfaction is the percent of agents in a Contact Center who are either satisfied or very satisfied with their jobs.

Why it's Important

Agent Job Satisfaction is a proxy for agent morale. And morale, while difficult to measure, affects performance on almost every metric in the Contact Center. High-performance Contact Centers almost always have high levels of Agent Job Satisfaction. A Contact Center can control and improve its performance on this metric through training, coaching, and career pathing.

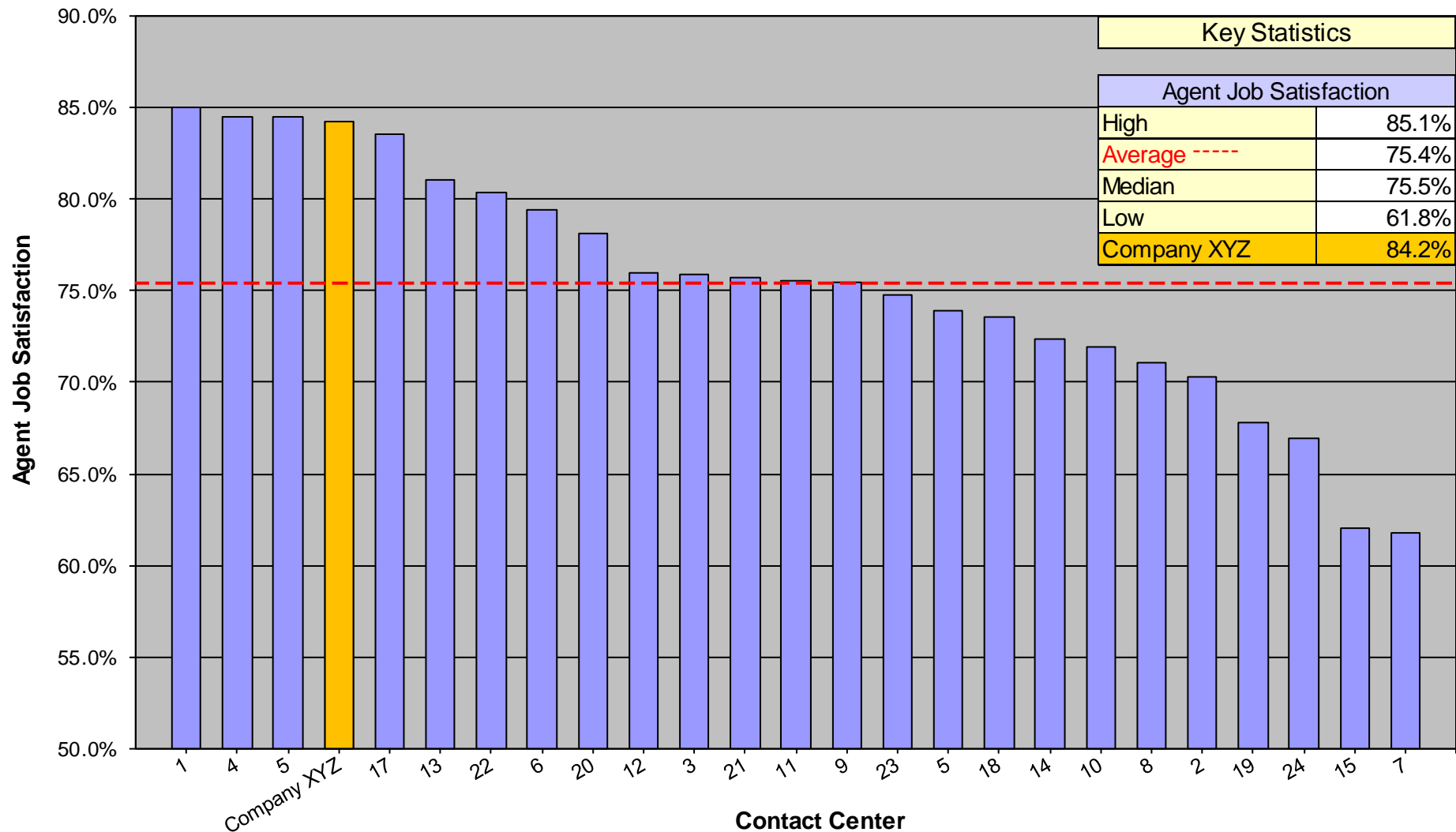
Key Correlations

Agent Job Satisfaction is strongly correlated with the following metrics:

- Annual Agent Turnover
- Customer Satisfaction
- Daily Agent Absenteeism
- Net First Contact Resolution Rate
- Agent Training Hours
- Agent Coaching Hours



Agent Metrics: Agent Job Satisfaction





Contact Handling Metrics



Contact Handling Metrics: Inbound Contact Handle Time

Definition

Inbound Contact Handle Time for live (telephone) contacts is the average time (in minutes) that an agent spends on each contact, including talk time, wrap time, and after-call work time. For non-live contacts, such as email, voicemail, and faxes, the Inbound Contact Handle Time is the average time that an agent spends resolving each contact (excluding any related outbound contact time).

Why it's Important

A contact is the basic unit of work in a Contact Center. Contact Handle Time, therefore, represents the amount of labor required to complete one unit of work.

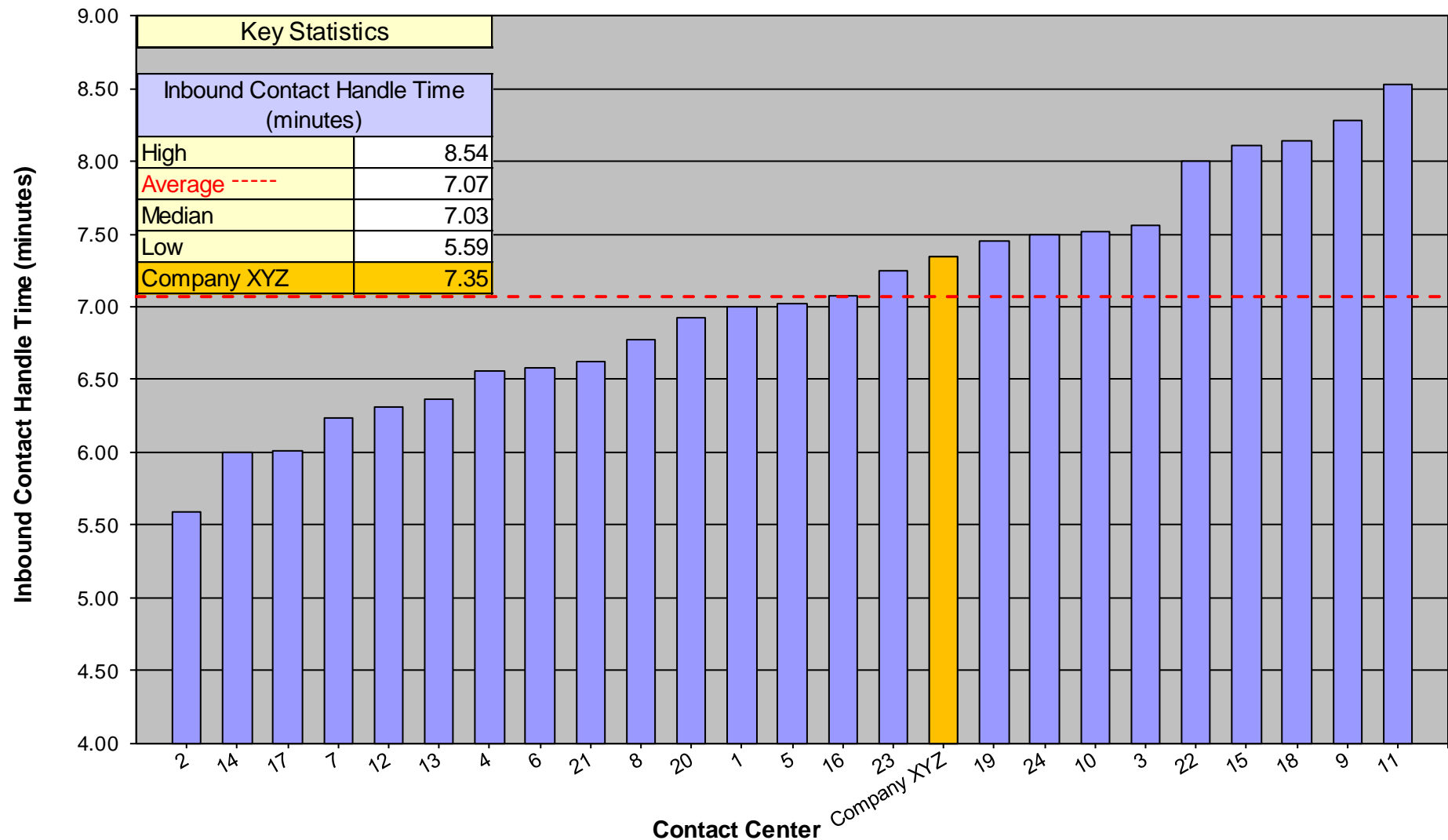
Key Correlations

Inbound Contact Handle Time is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Inbound Contacts per Agent per Month
- Net First Contact Resolution Rate



Contact Handling Metrics: Inbound Contact Handle Time



Contact Handling Metrics: Outbound Contact Handle Time

Definition

Outbound Contact Handle Time is the average time (in minutes) that an agent spends on each outbound contact, including talk time, wrap time, and after-call work time. Outbound contacts can include callbacks to customers who have left voice messages or sent emails, or callbacks to deliver information and solutions to customers who had previously called in.

Why it's Important

A contact is the basic unit of work in a Contact Center. Contact Handle Time, therefore, represents the amount of labor required to complete one unit of work.

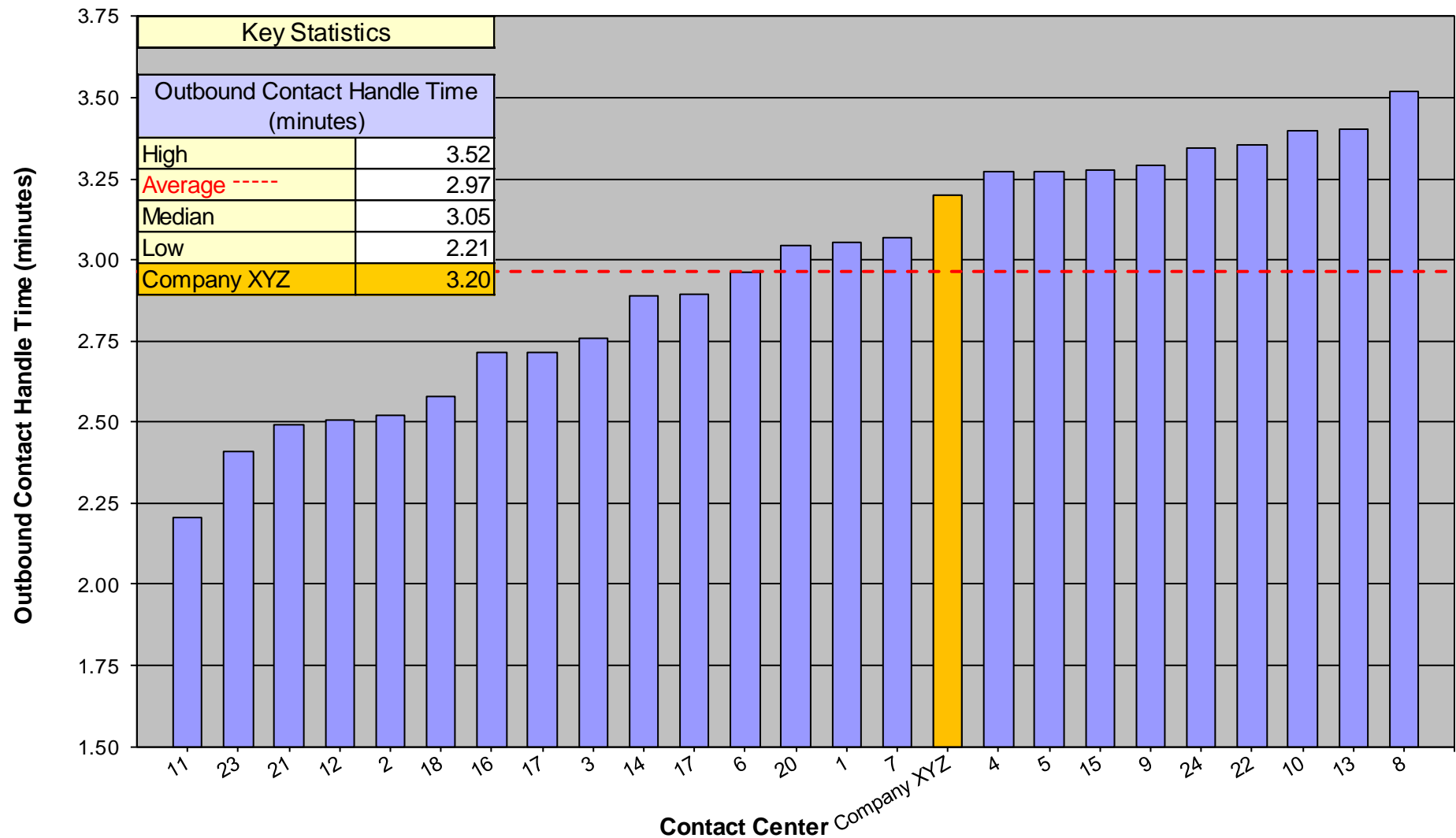
Key Correlations

Outbound Contact Handle Time is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Outbound Contacts per Agent per Month



Contact Handling Metrics: Outbound Contact Handle Time



Contact Handling Metrics: Outbound Contacts as a % of Total Contacts

Definition

This metric is fairly self-explanatory. It is a measure of outbound contact volume divided by all contact volume, including inbound and outbound contacts from all sources (live voice, voicemail, email, etc.).

Why it's Important

Effective Contact Centers with a high Net First Contact Resolution Rate generally have fewer outbound contacts. By contrast, a low Net FCR generally results in a higher outbound contact volume.

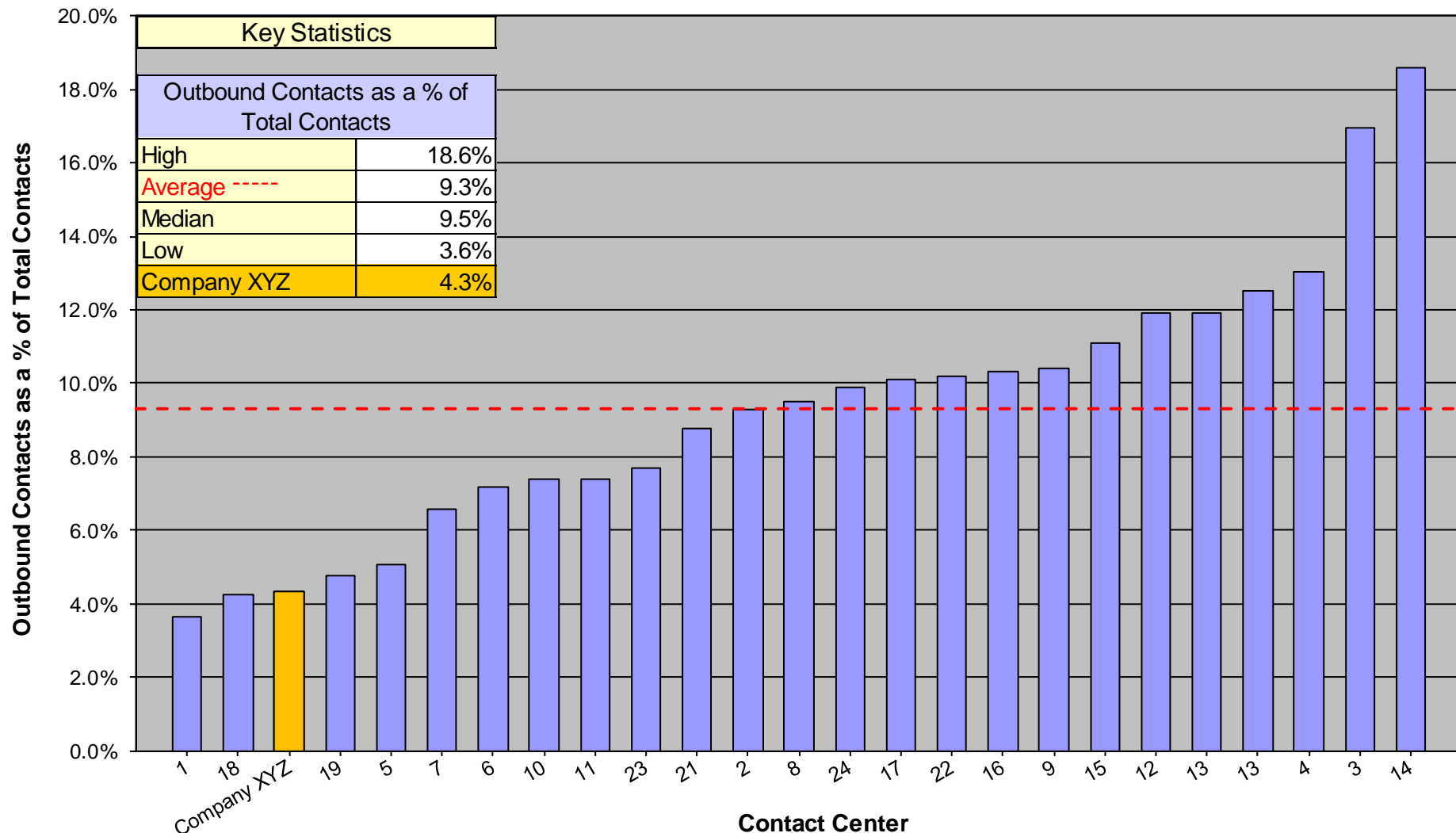
Key Correlations

Outbound Contacts as a % of Total Contacts is strongly correlated with the following metrics:

- Net First Contact Resolution Rate
- Cost per Inbound Contact
- Outbound Contacts per Agent per Month



Contact Handling Metrics: Outbound Contacts as a % of Total Contacts



Contact Handling Metrics: IVR Containment Rate

Definition

The IVR Containment Rate is the percentage of inbound contacts that are contained within the IVR and resolved by the customer without assistance from a live agent. A user who opts out of the IVR to speak with a live agent does not count toward the IVR Containment Rate because the user did not resolve the issue before speaking with a live agent.

Why it's Important

The Cost per Inbound Contact for IVR-contained contacts is significantly lower than it is for agent-assisted calls. By increasing the number of contacts resolved through the IVR, the overall Cost per Inbound Contact can be reduced significantly. Many Contact Centers, recognizing the potential to reduce their costs, constantly strive to increase their IVR Containment Rates.

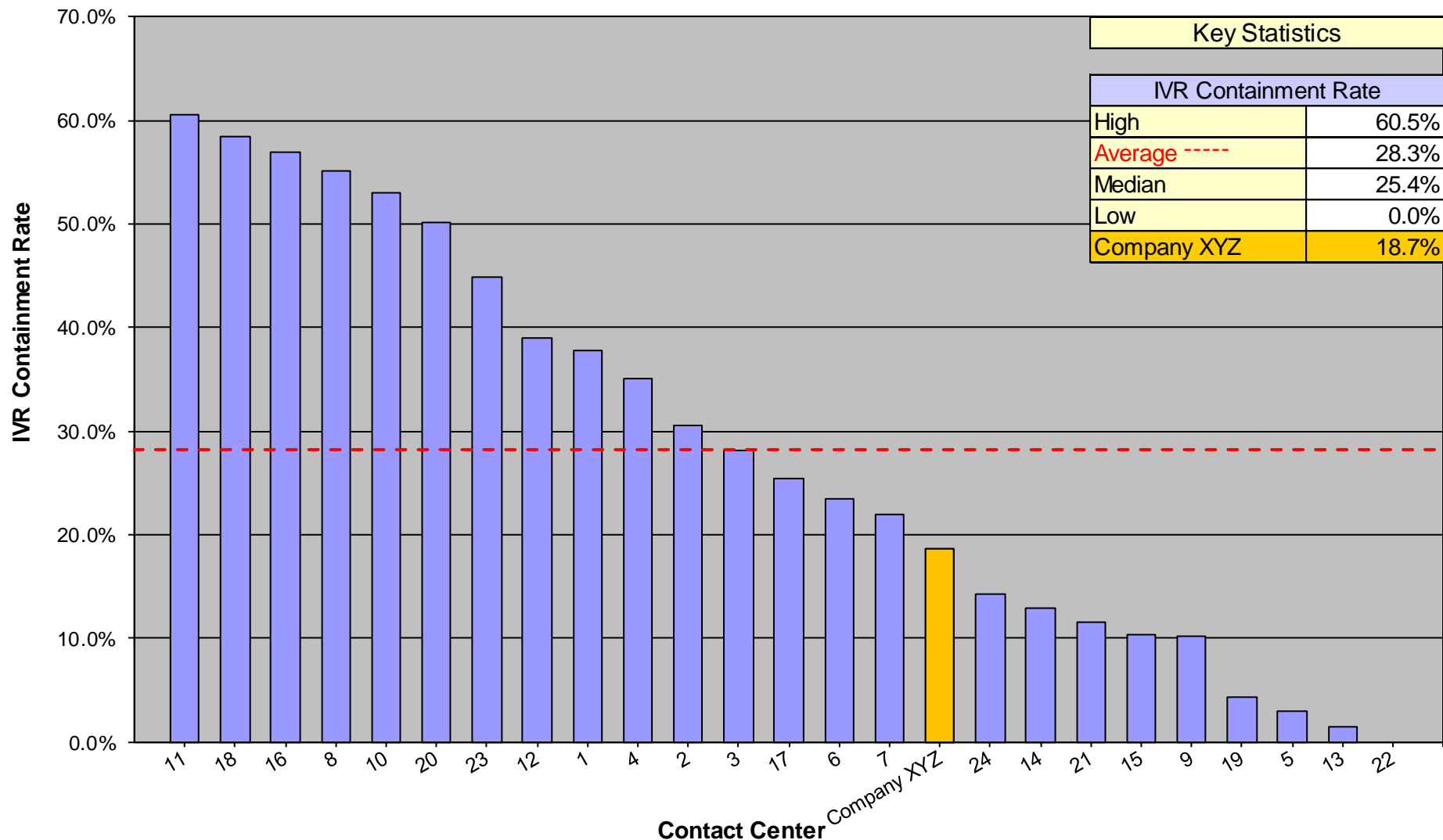
Key Correlations

IVR Containment Rate is strongly correlated with the following metrics:

- Cost per Inbound Contact
- Inbound Contact Handle Time



Contact Handling Metrics: IVR Containment Rate





About MetricNet: *Your Benchmarking Partner*



MetricNet™
Performance Benchmarking

Your Project Manager: 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 IT Service and Support 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 Services

Contact Centers

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

Telecom

- Price Benchmarking

Satisfaction

- Customer Satisfaction
- Employee Satisfaction



28 Years of Contact Center Benchmarking Data



Global Database

More than 3,700 Benchmarks

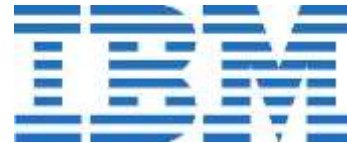
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