

icmi™ EMPOWERING CONTACT CENTER EXCELLENCE



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| CONSULTING

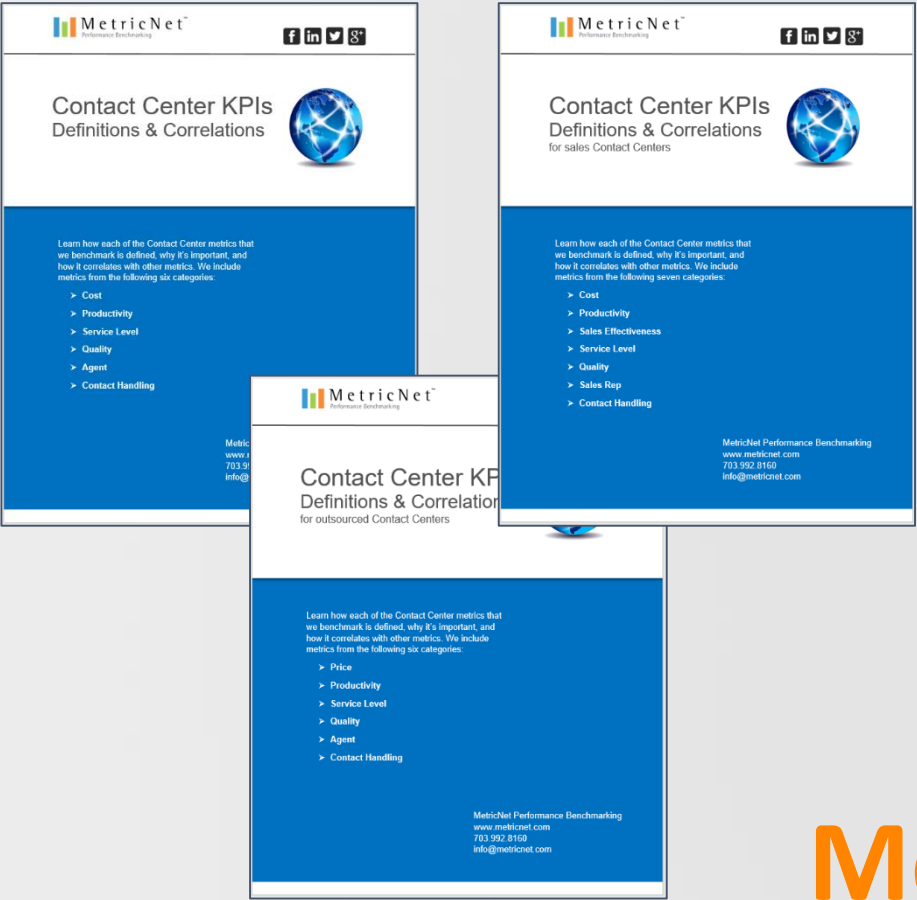


icmi[™] CONTACT CENTER CONNECTIONS

Session 101:
**Are Your Performance Targets on
Target?**

Jeff Rumburg, *Managing Partner*, MetricNet, LLC

Download Three KPI eBooks & Today's Presentation



icmi CONTACT CENTER CONNECTIONS

Session 101:
Are Your Performance Targets on Target?
Jeff Rumburg, *Managing Partner, MetricNet, LLC*

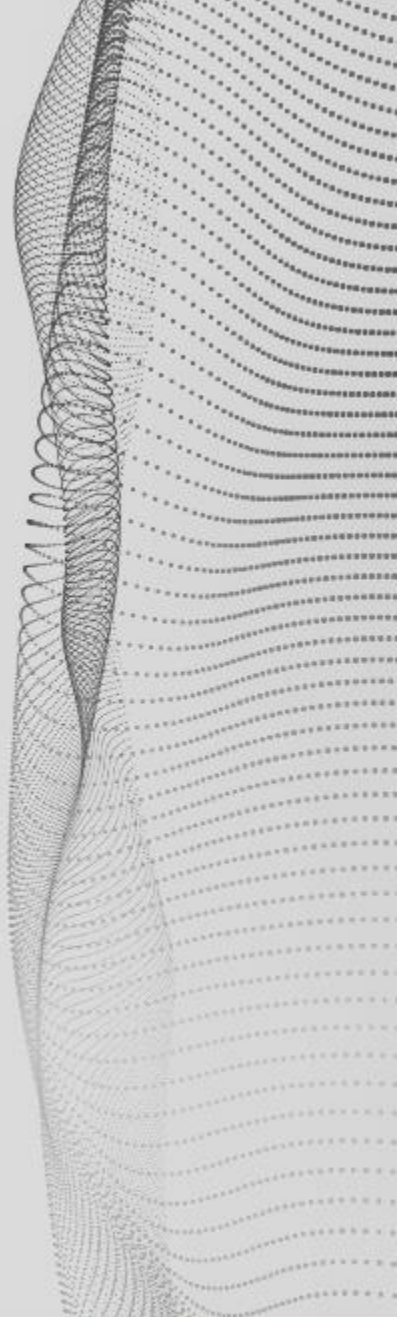
A more connected conference experience! #CCDemo

MetricNet.com/ICMIeBooks

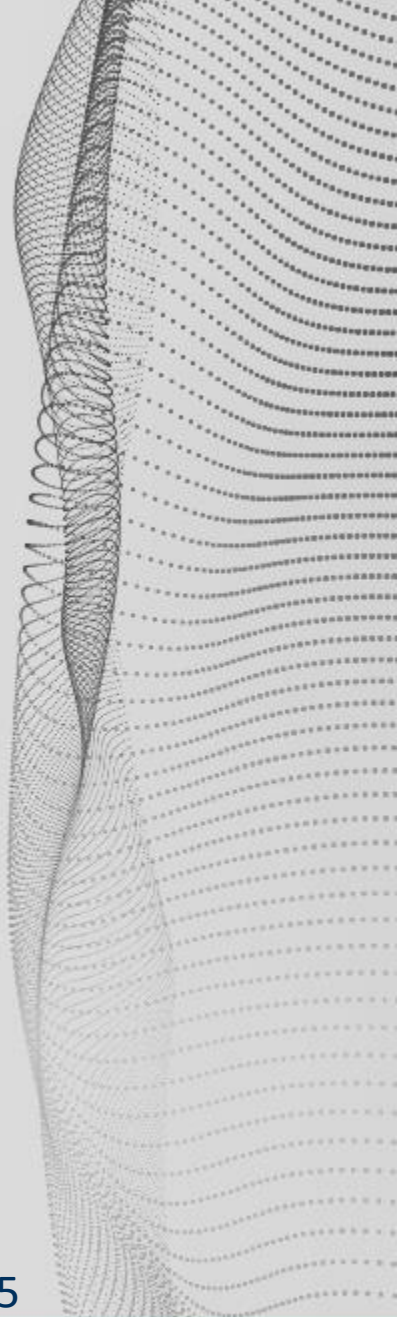
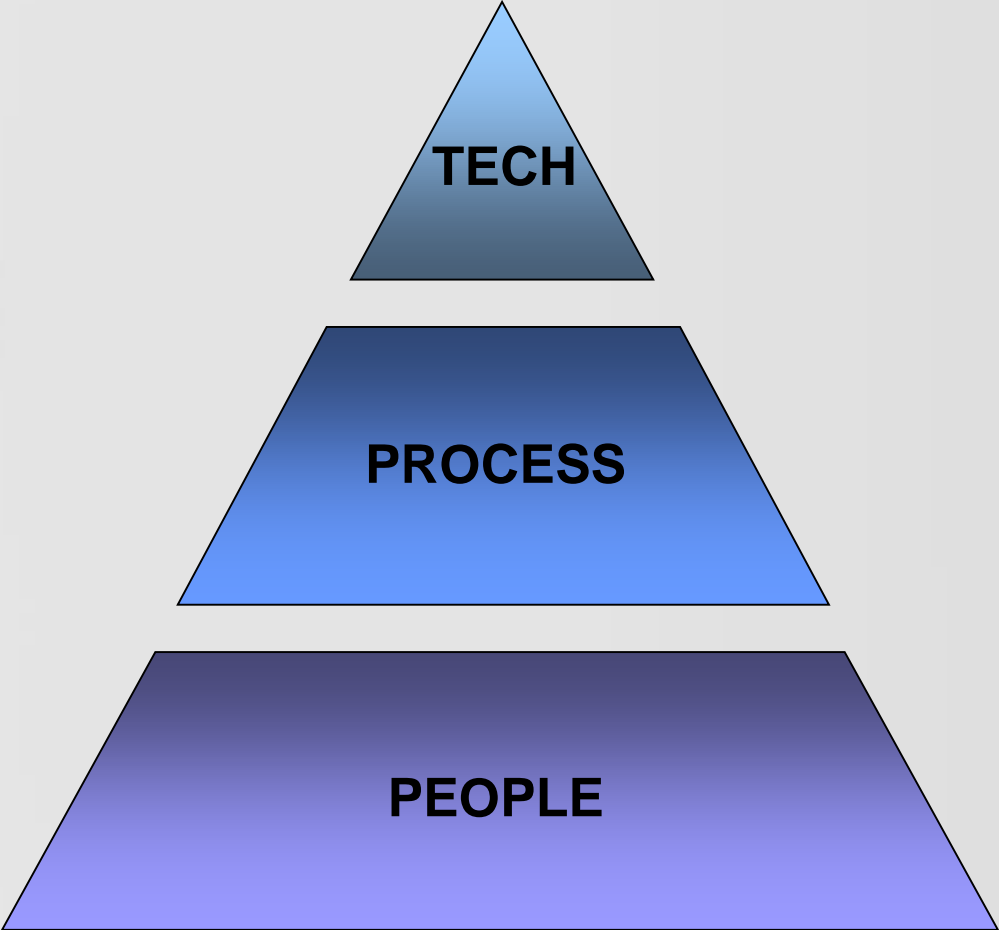
I Need a Volunteer...

Do you Know:

- Monthly Contact Volume
- Average Handle Time
- Agent Headcount
- Average Agent Compensation
- Customer Satisfaction
- First Contact Resolution Rate
- Agent Job Satisfaction
- Average Speed of Answer



The Traditional Paradigm for Contact Centers

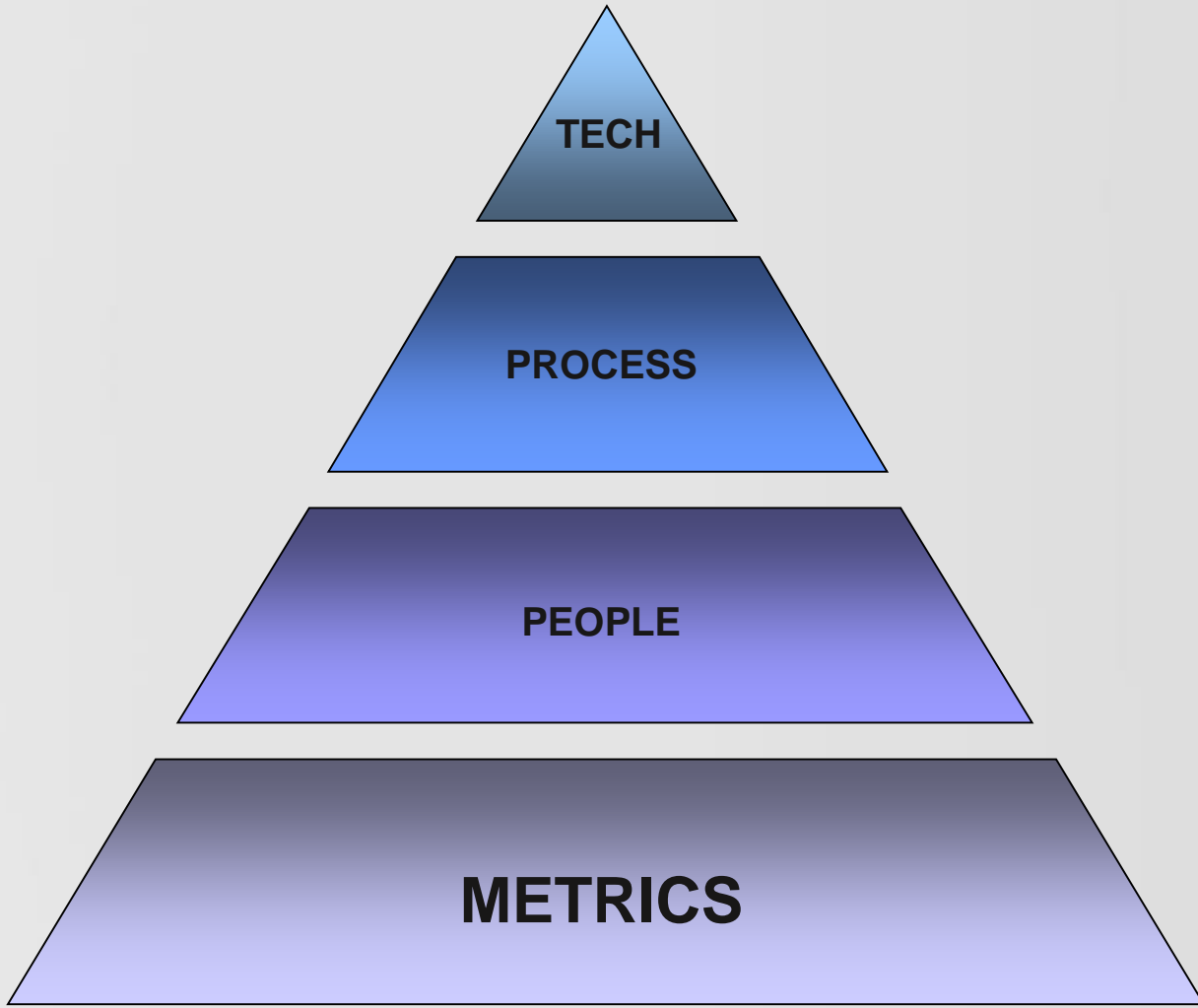


Characteristics of a World-Class Contact Center

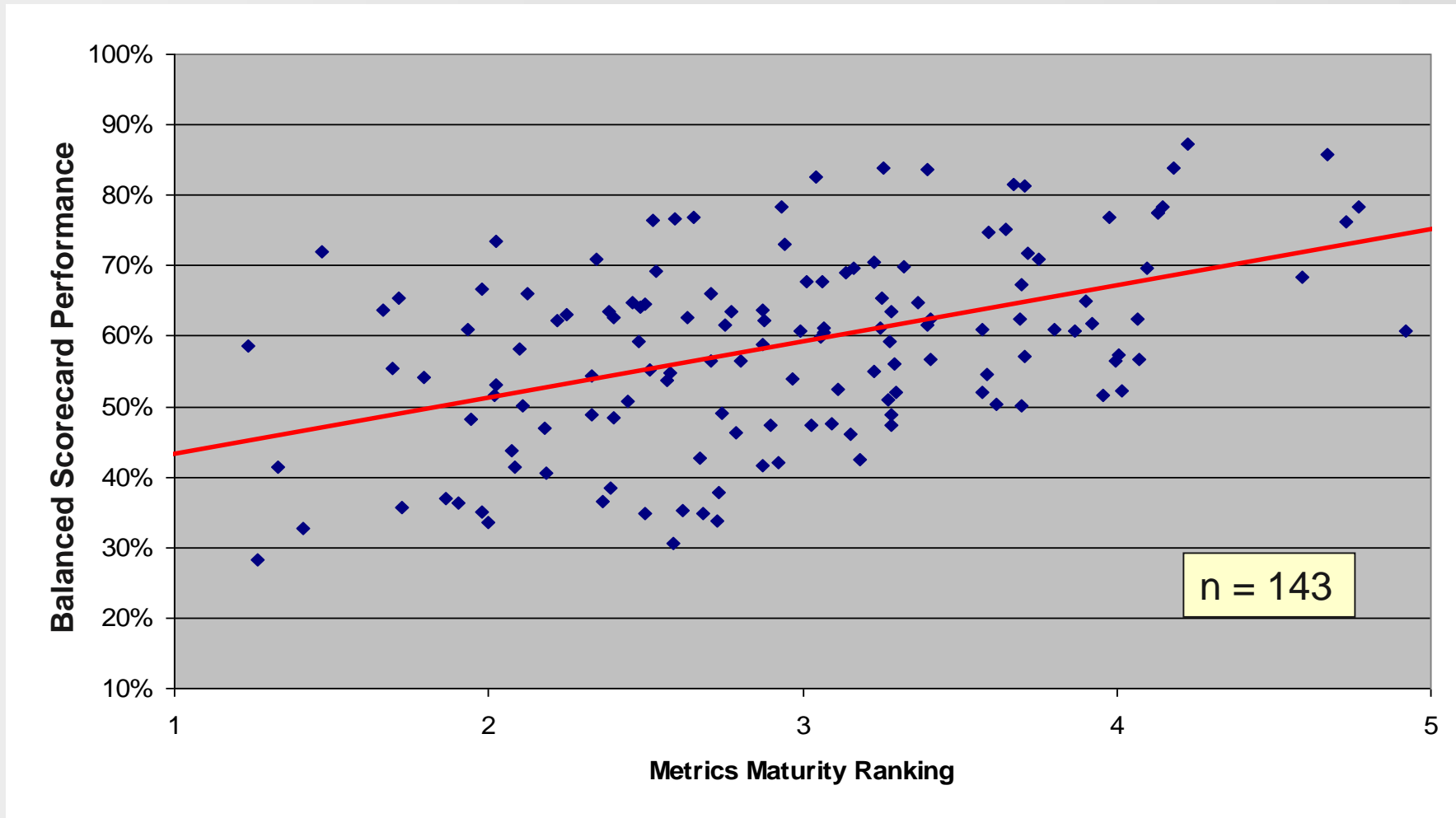
1. Contact center consistently exceeds customer expectations – regardless of the transaction type
 - Call Quality is consistently high
 - Customer Satisfaction is in the top quartile
2. Business value is managed at or above industry average levels
 - Cost per contact is below industry average levels – bottom quartile Cost per Contact
 - Revenue generated is above industry average levels
 - Telemarketing and Telesales
 - Debt collections

3. Contact Center follows industry best practices
 - Industry best practices are defined and documented
 - Contact Center follows industry best practices
4. Every transaction adds value
 - A positive customer experience improves customer loyalty
 - Creates positive brand awareness and switching costs
 - Contact Center ROI > 100%

METRICS: An Even More Fundamental Building Block!



The Evidence for Metrics as a Foundation Block



Some Important Questions to Ask About KPIs

Have You Leveraged KPIs for World-Class Performance?

5 %

Do You Use Metrics to Continuously Improve?

10 %

Do You Use Metrics Prescriptively?

10%

Do You Use Metrics Diagnostically?

20%

Do You Understand KPI Cause-and-Effect?

30%

Do You Set Performance Targets with KPIs?

60%

Can you Define Your KPIs?

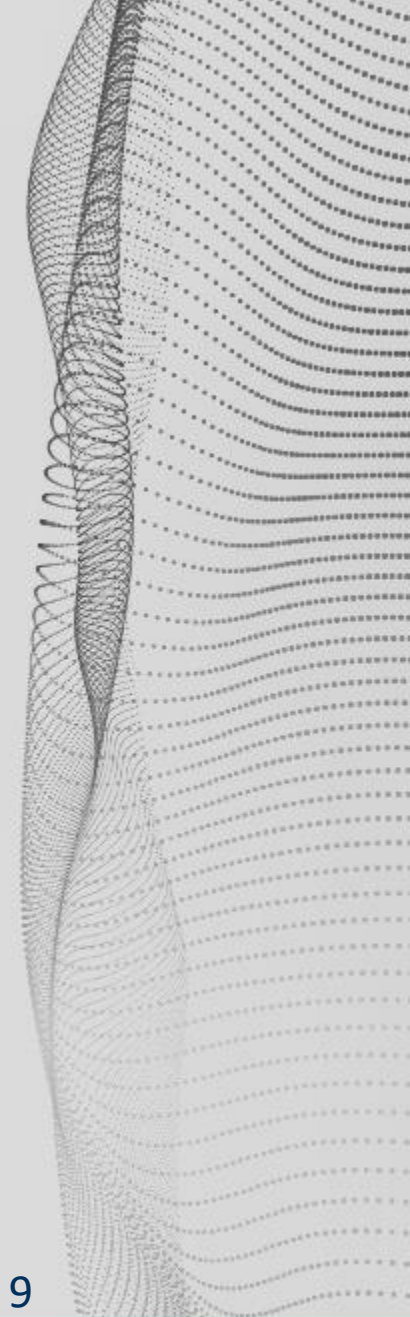
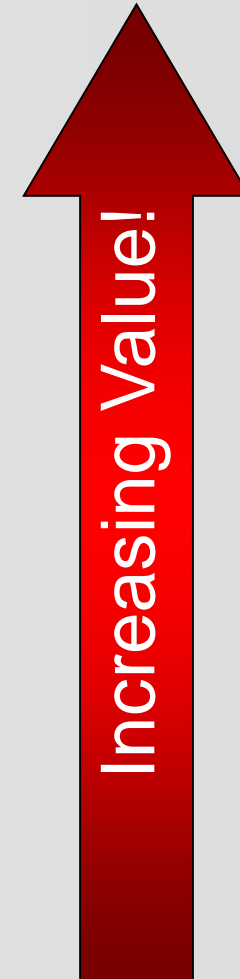
80%

Do You Use Metrics for Reporting?

90%

Do You Have KPIs?

100%



Some Common Contact Center Metrics

Cost

- Cost per Contact
- Cost per Minute of Handle Time

Quality

- Customer Satisfaction
- Call Quality
- First Contact Resolution Rate

Productivity

- Agent Utilization
- Contacts per Agent per Month

Agent

- Agent Occupancy
- Agent Turnover
- Daily Absenteeism
- New Agent Training Hours
- Annual Agent Training Hours
- Agents as % of Total FTE's
- Schedule Adherence
- Agent Tenure
- Agent Job Satisfaction

Service Level

- Average Speed of Answer (ASA)
- Call Abandonment Rate
- % Answered Within 30 Seconds
- Percent of Calls Blocked

Call Handling

- Call Handle Time
- After Call Work Time
- IVR Completion Rate
- Agent-less Completion Rate
- % of Calls Transferred

And there are hundreds more!!

The 80/20 Rule for Contact Center KPIs

Cost

Cost per Contact

Quality

Customer Satisfaction

Productivity

Agent Utilization

Call Handling

First Contact Resolution Rate

Agent

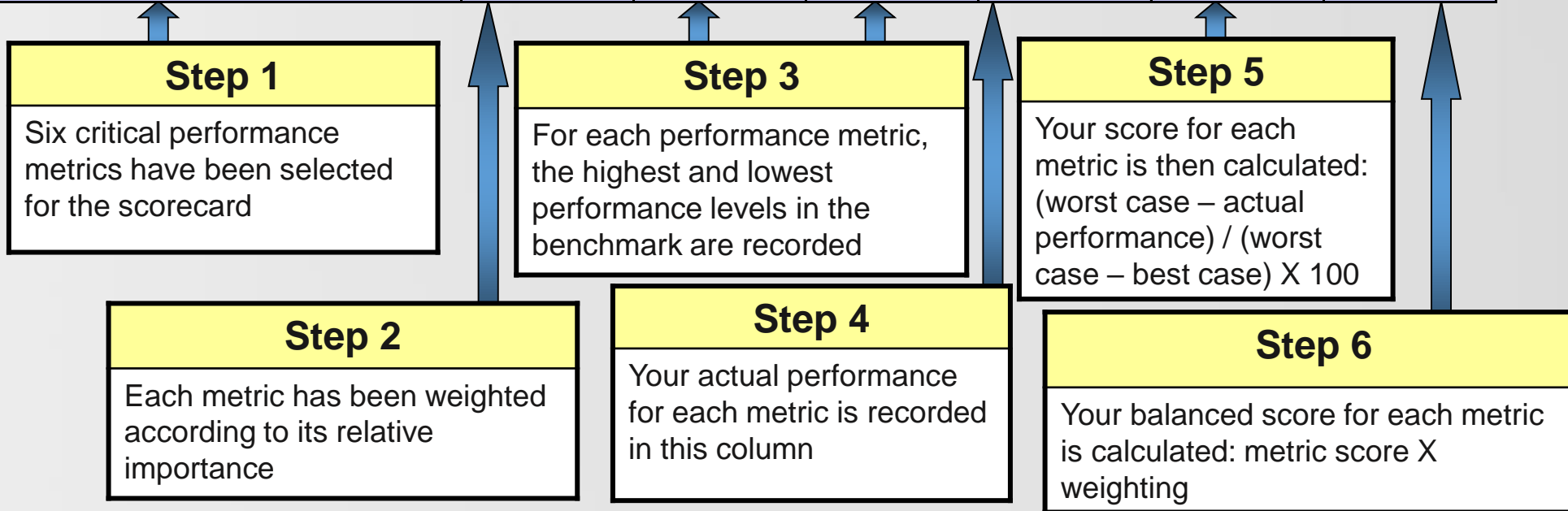
Agent Job Satisfaction

Aggregate

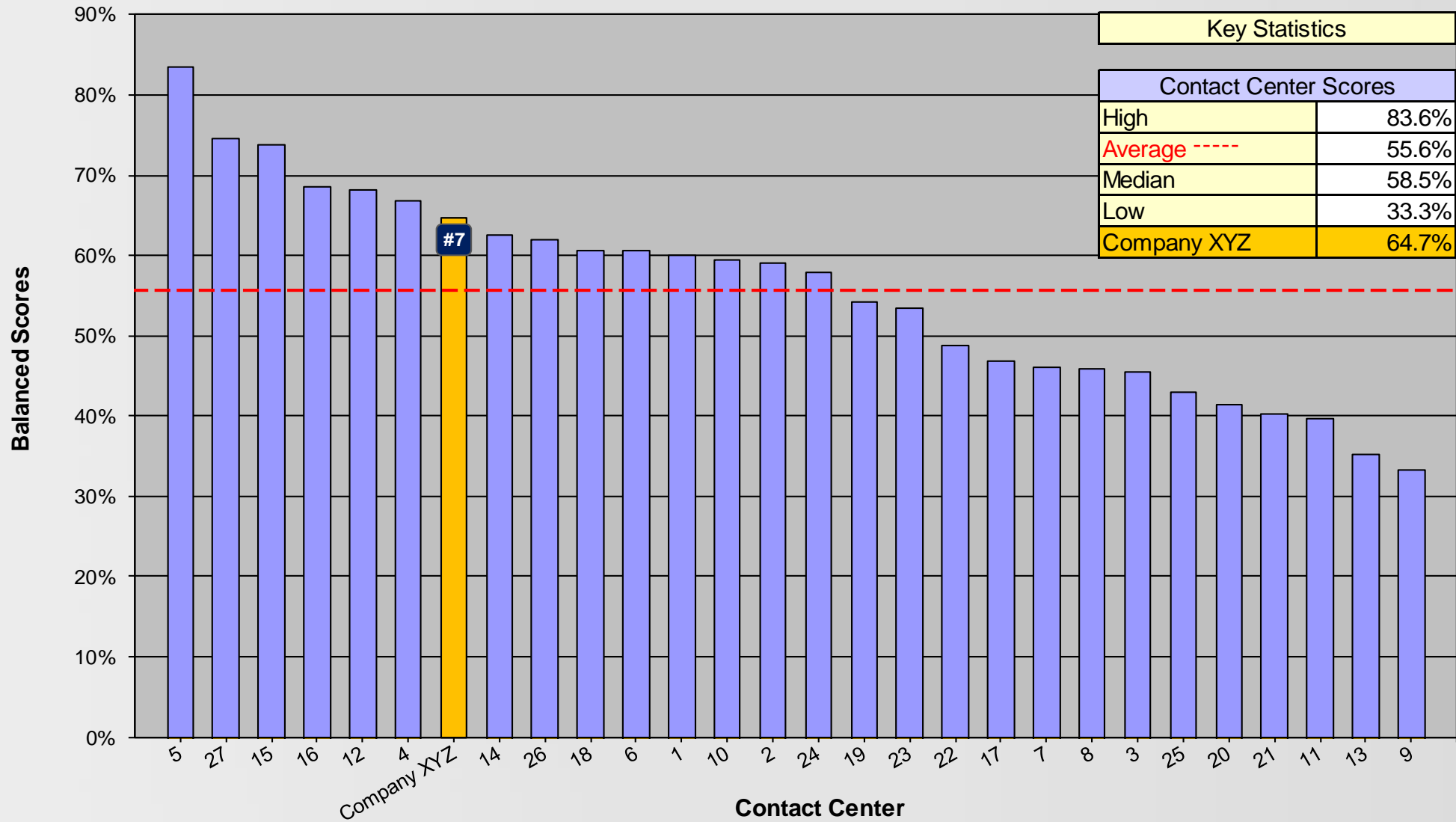
Balanced Scorecard

The Contact Center Balanced Scorecard

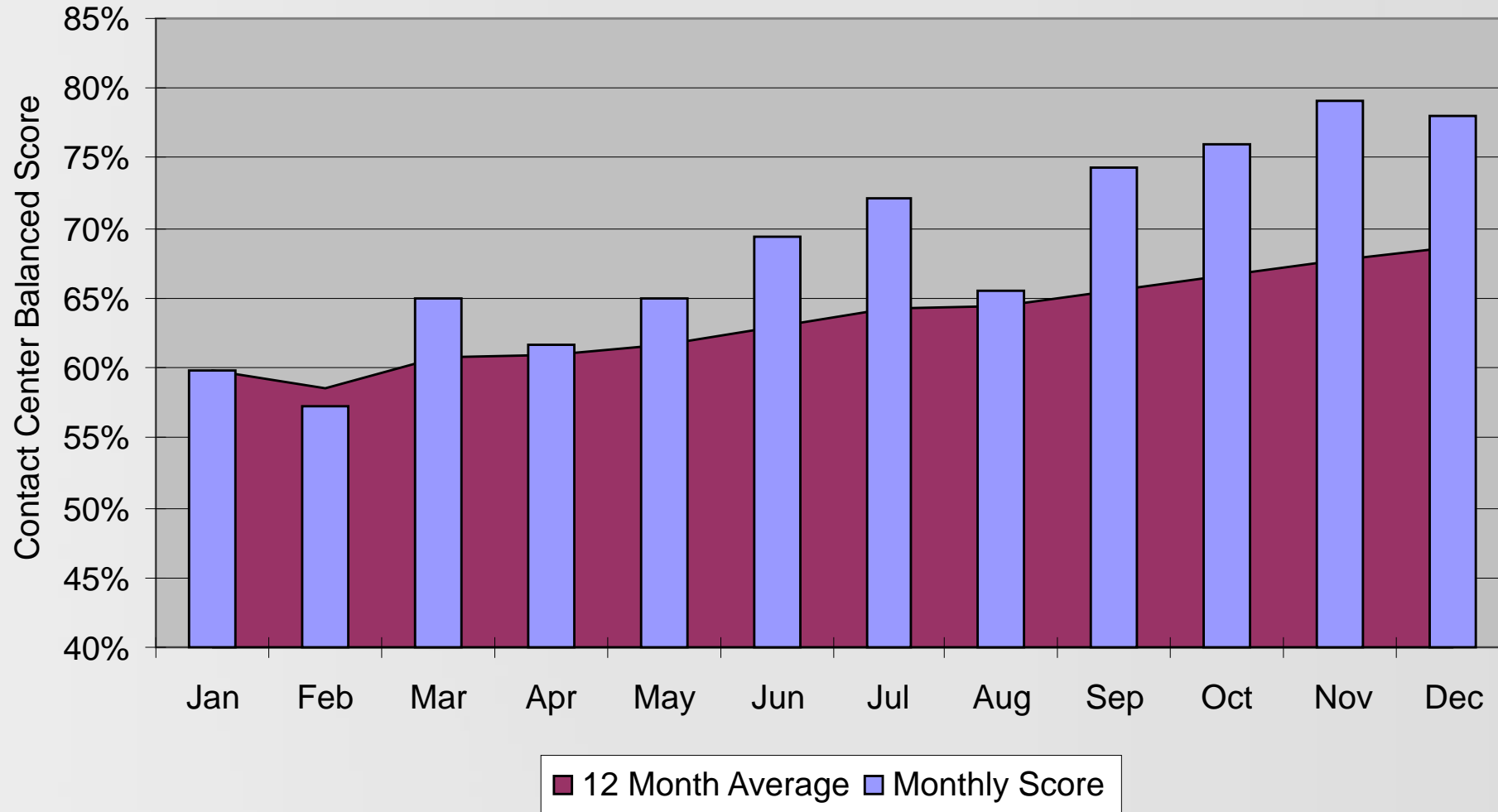
Performance Metric	Metric Weighting	Performance Range		Your Actual Performance	Metric Score	Balanced Score
		Worst Case	Best Case			
Cost per Inbound Contact	25.0%	\$9.10	\$4.21	\$6.44	54.4%	13.6%
Customer Satisfaction	25.0%	80.3%	98.1%	94.7%	80.9%	20.2%
Agent Utilization	15.0%	46.5%	64.9%	58.6%	65.8%	9.9%
Net First Contact Resolution Rate	15.0%	76.6%	94.2%	92.5%	90.4%	13.6%
Agent Job Satisfaction	10.0%	66.1%	90.9%	84.5%	74.2%	7.4%
Average Speed of Answer (seconds)	10.0%	229	12	229	0.0%	0.0%
Total	100.0%	N/A	N/A	N/A	N/A	64.7%



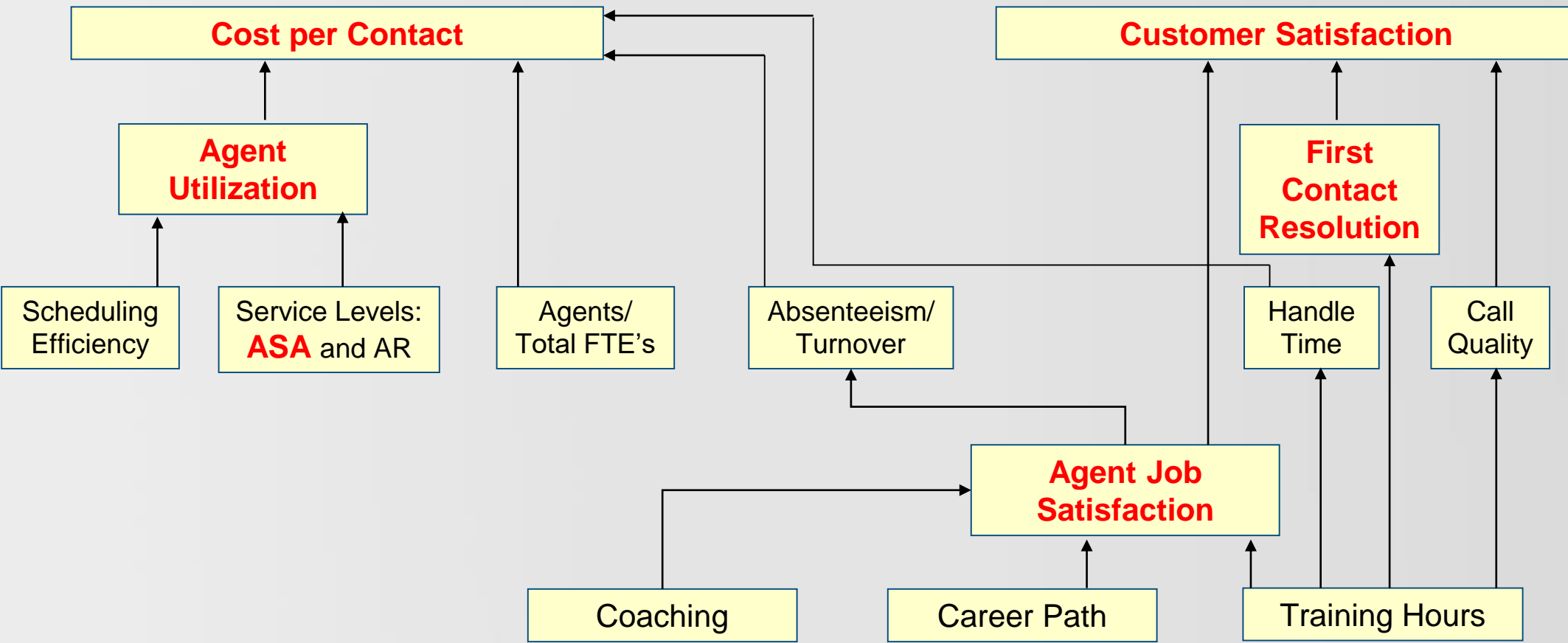
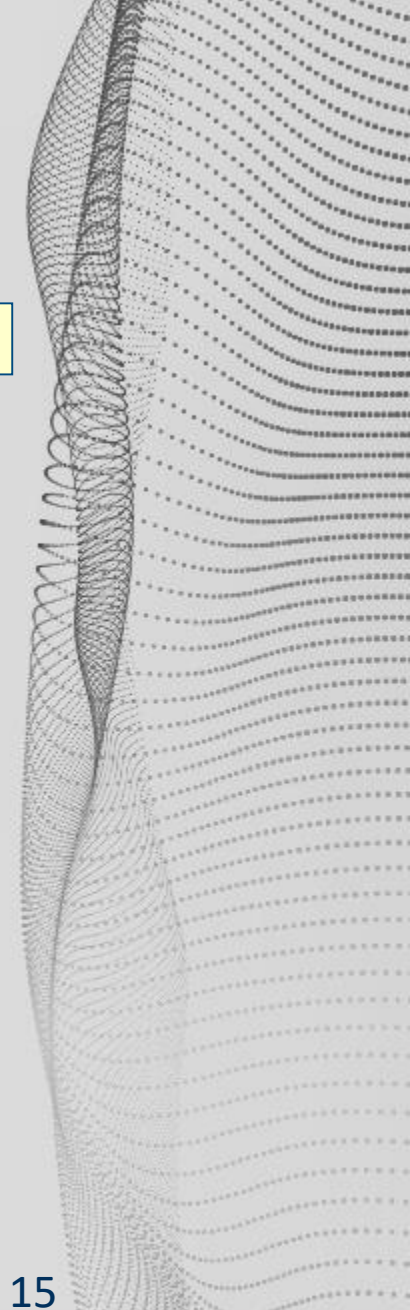
Benchmarking Your Overall Performance



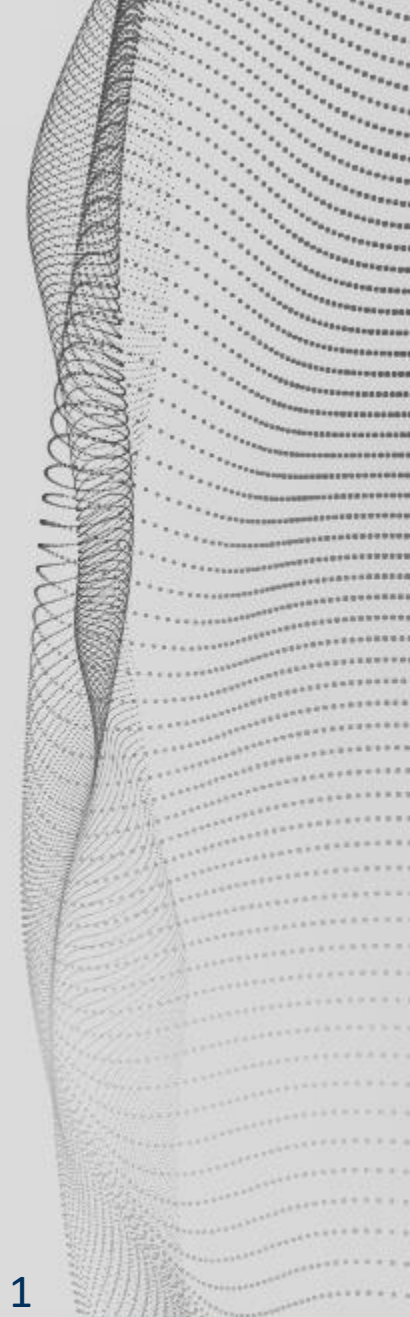
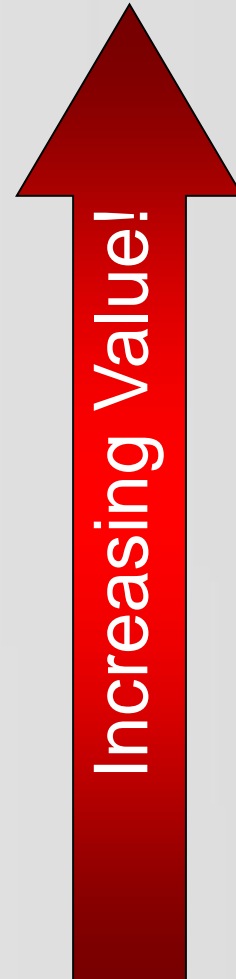
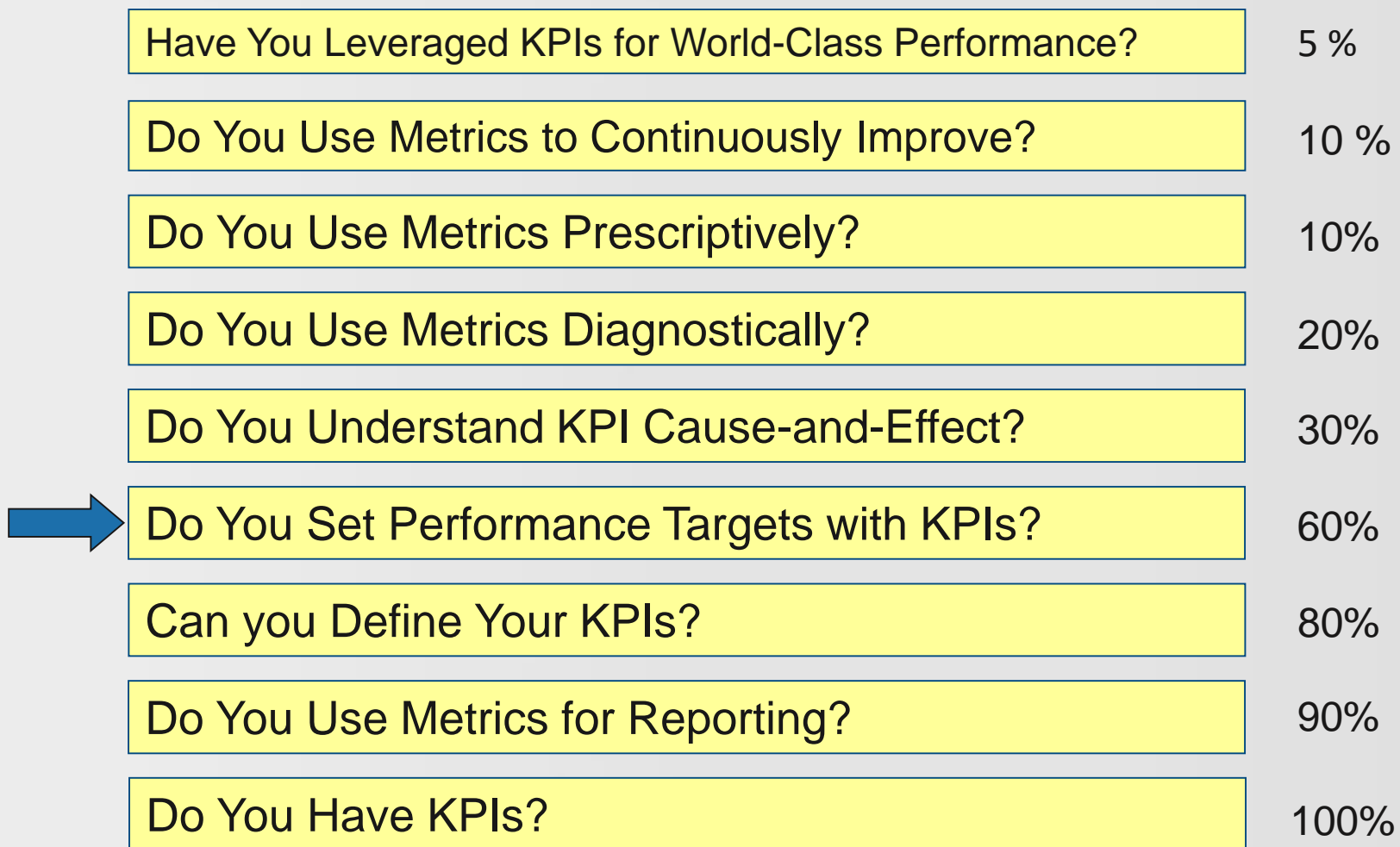
The Contact Center Performance Trend



Important Contact Center KPI Correlations



Some Important Questions to Ask About KPIs



Case Study Example

Contact Center Benchmarking Output

Metric Type	Key Performance Indicator (KPI)	Company XYZ	Peer Group Statistics			
			Average	Min	Median	Max
Cost	Cost per Inbound Contact	\$6.44	\$6.11	\$4.21	\$6.13	\$9.10
	Cost per Minute of Inbound Handle Time	\$1.11	\$0.99	\$0.80	\$0.98	\$1.32
Productivity	Inbound Contacts per Agent per Month	963	867	632	832	1,199
	Outbound Contacts per Agent per Month	51	93	15	87	192
	Agent Utilization	58.6%	56.2%	46.5%	57.5%	64.9%
	Agents as a % of Total Headcount	74.5%	82.7%	73.7%	83.6%	90.8%
Service Level	Average Speed of Answer (seconds)	229	80	12	75	229
	% of Calls Answered in 60 Seconds	44.3%	45.5%	18.3%	43.3%	82.0%
	Call Abandonment Rate	17.0%	7.4%	1.1%	6.9%	17.0%
Quality	Call Quality	89.7%	90.9%	81.4%	91.3%	98.8%
	Net First Contact Resolution Rate	92.5%	84.5%	76.6%	84.2%	94.2%
	Customer Satisfaction	94.7%	89.6%	80.3%	90.0%	98.1%
Agent	Annual Agent Turnover	46.3%	32.2%	15.2%	31.7%	60.4%
	Daily Agent Absenteeism	5.6%	5.9%	2.9%	5.2%	11.3%
	Agent Occupancy	86.5%	72.4%	54.0%	72.7%	87.7%
	Schedule Adherence	94.5%	86.5%	73.3%	89.3%	94.5%
	New Agent Training Hours	160	116	96	114	160
	Annual Agent Training Hours	17	13	0	14	34
	Agent Tenure (months)	29.9	40.8	20.9	38.9	75.6
	Agent Job Satisfaction	84.5%	80.1%	66.1%	80.3%	90.9%
Contact Handling	Inbound Contact Handle Time (minutes)	5.78	6.11	4.92	6.00	7.60
	Outbound Contact Handle Time (minutes)	2.00	2.27	2.00	2.28	2.65
	Outbound Contacts as a % of Total Contacts	5.0%	9.7%	1.9%	9.2%	17.3%
	IVR Containment Rate	51.8%	57.9%	43.8%	57.9%	71.9%

Quartile Performance

Balanced Scorecard Metrics	Quartile				Company XYZ Performance
	1 (Top)	2	3	4 (Bottom)	
Cost per Inbound Contact	\$4.21	\$5.27	\$6.13	\$6.52	\$6.44
	\$5.27	\$6.13	\$6.52	\$9.10	
Customer Satisfaction	98.1%	93.5%	90.0%	86.6%	94.7%
	93.5%	90.0%	86.6%	80.3%	
Agent Utilization	64.9%	59.9%	57.5%	52.4%	58.6%
	59.9%	57.5%	52.4%	46.5%	
Net First Contact Resolution	94.2%	87.4%	84.2%	81.4%	92.5%
	87.4%	84.2%	81.4%	76.6%	
Agent Job Satisfaction	90.9%	84.5%	80.3%	75.2%	84.5%
	84.5%	80.3%	75.2%	66.1%	
Average Speed of Answer (seconds)	12	59	75	97	229
	59	75	97	229	

North American Performance Quartiles

Best Performers

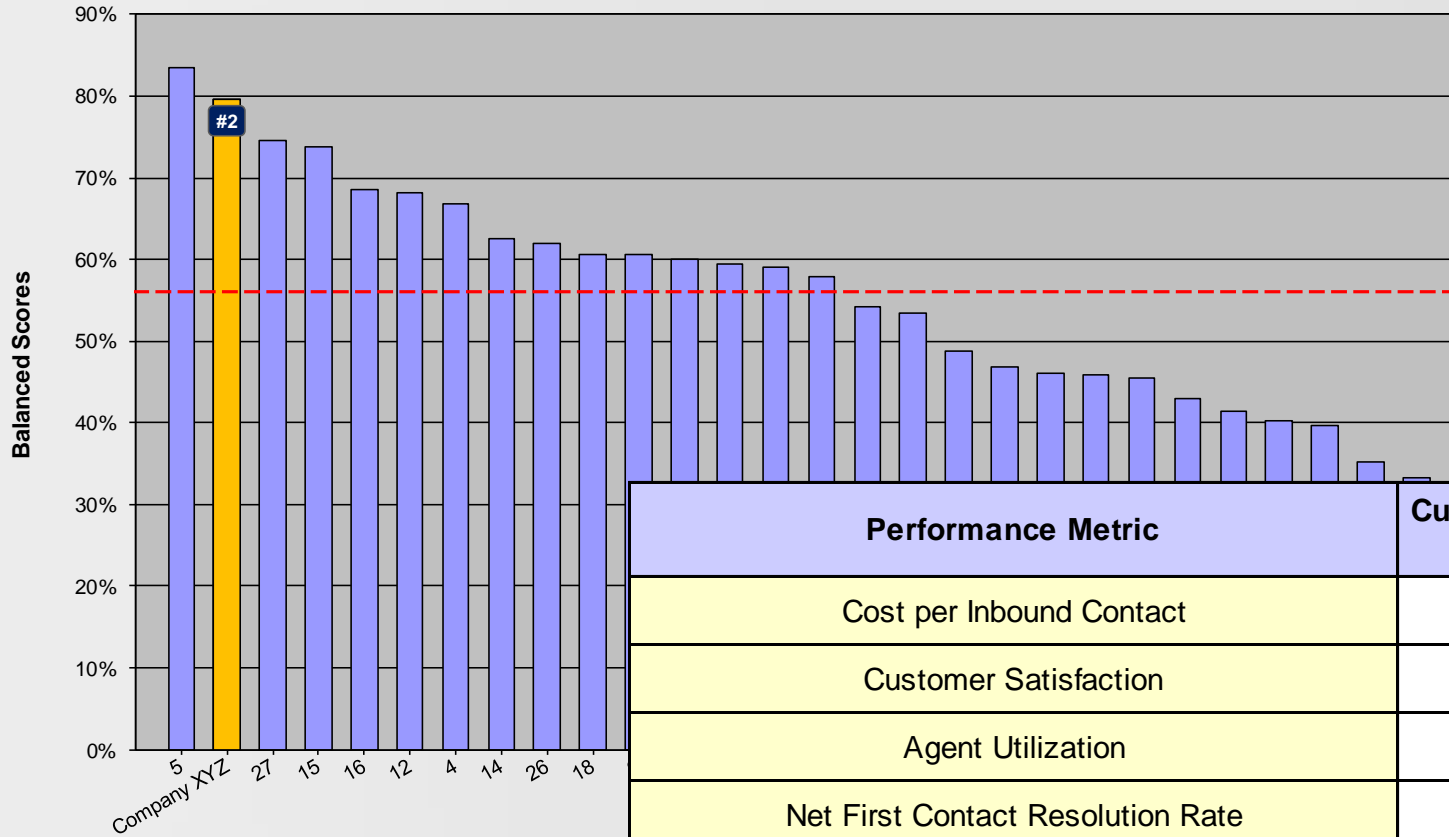
Worst Performers

	1 st Quartile	2 nd Quartile	3 rd Quartile	4 th Quartile
Cost per Minute of Contact Handle Time	< \$.85	\$.85 - \$1.12	\$1.12 - \$1.70	> \$1.70
Voice Customer Satisfaction	> 94.2%	94.2% - 82.1%	82.1% - 72.8%	< 72.8%
Voice Agent Utilization	> 63.2%	63.2% - 55.8%	55.8% - 44.5%	< 44.5%
Net First Contact Resolution Rate	> 90.2%	90.2% - 83.5%	83.5% - 66.9%	< 66.9%
Agent Job Satisfaction	> 88.4%	88.4% - 75.7%	75.7% - 62.8%	< 62.8%
Average Speed of Answer (seconds)	< 27	27 - 58	58 - 105	> 105
Contact Center Balanced Score	> 61.1%	61.1% - 50.3%	50.3% - 39.2%	< 39.2%

Contact Center Performance Targets

Performance Metric	Current Company XYZ Performance	Target Performance
Cost per Inbound Contact	\$6.44	\$5.85
Customer Satisfaction	94.7%	94.2%
Agent Utilization	58.6%	63.2%
Net First Contact Resolution Rate	92.5%	90.2%
Agent Job Satisfaction	84.5%	88.4%
Average Speed of Answer (seconds)	229	27
Balanced Score	64.7%	79.6%

Simulated Impact on the Balanced Score



Performance Metric	Current Company XYZ Performance	Target Performance
Cost per Inbound Contact	\$6.44	\$5.85
Customer Satisfaction	94.7%	94.2%
Agent Utilization	58.6%	63.2%
Net First Contact Resolution Rate	92.5%	90.2%
Agent Job Satisfaction	84.5%	88.4%
Average Speed of Answer (seconds)	229	27
Balanced Score	64.7%	79.6%

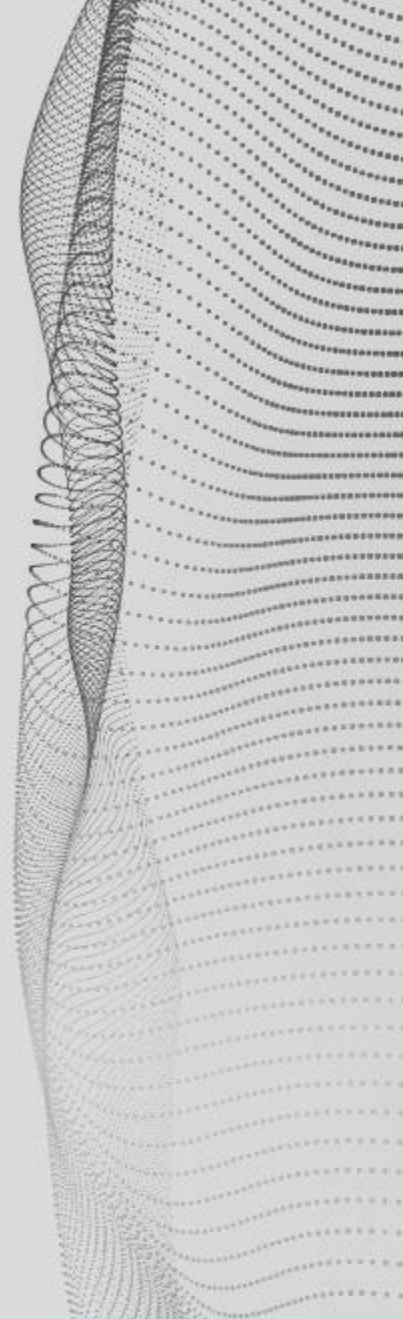
The Results – 12 Months Later

Performance Metric	Company XYZ	Target Performance	Company XYZ 12 Months Later	Distance from Target
Cost per Inbound Contact	\$6.44	\$5.85	\$6.16	\$0.31
Customer Satisfaction	94.7%	94.2%	95.2%	Target Exceeded
Agent Utilization	58.6%	63.2%	63.2%	Target Met
Net First Contact Resolution Rate	92.5%	90.2%	92.5%	Target Exceeded
Agent Job Satisfaction	84.5%	88.4%	90.5%	Target Exceeded
Average Speed of Answer (seconds)	229	27	47	20
Balanced Score	64.7%	79.6%	79.9%	Target Exceeded

I Need a Volunteer...

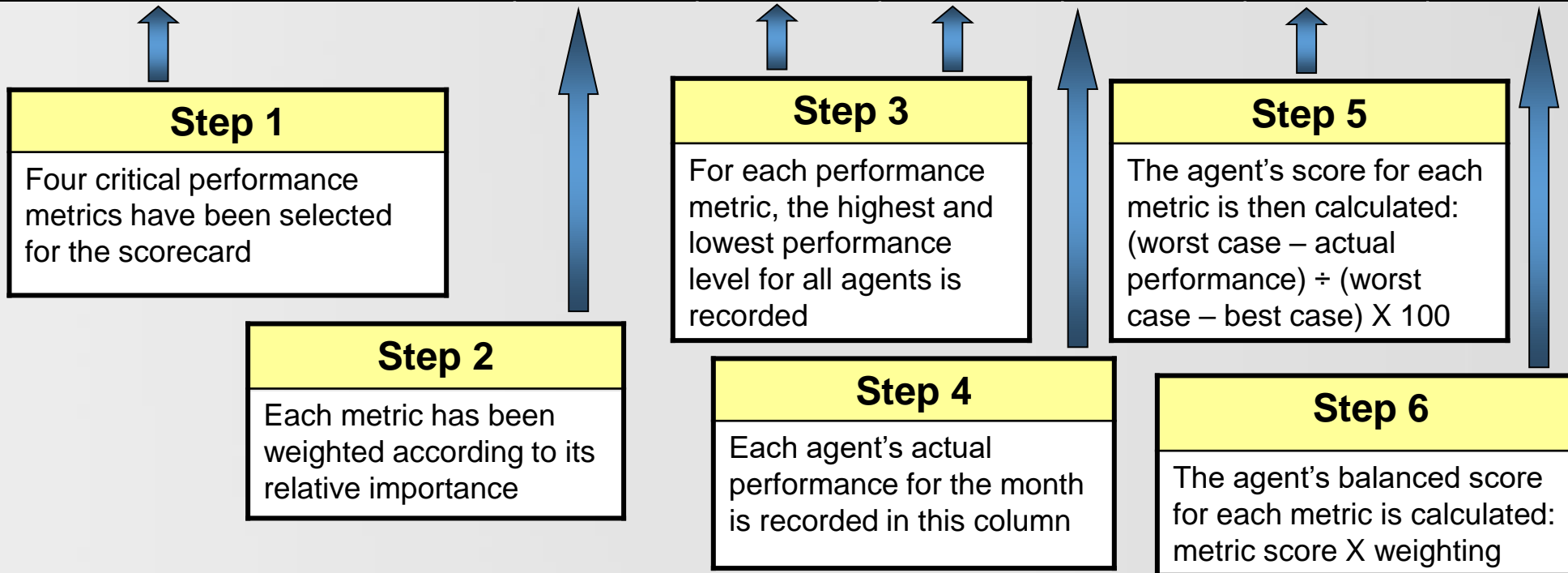


Monthly Contact Volume	
Average Contact Handle Time	
Agent Headcount	
Average Agent Compensation	
Customer Satisfaction	
First Contact Resolution Rate	
Agent Job Satisfaction	
Average Speed of Answer	



The Agent Scorecard

Performance Metric	Metric Weighting	Performance Range		Your Score	Metric Score	Balanced Score
		Worst Case	Best Case			
Schedule Adherence	25.0%	70.0%	99.0%	70.0%	0.0%	0.0%
Call Quality	25.0%	50.0%	100.0%	93.1%	86.2%	21.6%
Customer Satisfaction	25.0%	70.5%	98.4%	98.4%	100.0%	25.0%
First Contact Resolution Rate	25.0%	63.6%	84.0%	80.6%	83.3%	20.8%
Total	100.0%	N/A	N/A	N/A	N/A	67.4%



Monthly Agent Performance Rankings

Agent Number	Monthly Ranking	Monthly Scorecard Performance						Six Month Average
		Sep	Aug	Jul	Jun	May	Apr	
11	1	95.8%	98.0%	97.1%	95.7%	98.3%	97.3%	97.0%
32	2	92.8%	92.1%	90.3%	89.3%	84.6%	92.2%	90.2%
21	3	91.5%	88.5%	83.2%	94.0%	93.7%	93.5%	90.7%
35	4	91.0%	86.8%	85.2%	78.5%	80.5%	68.2%	81.7%
14	5	89.5%	89.1%	90.0%	90.1%	92.3%	92.1%	90.5%
26	6	83.8%	84.4%	90.2%	86.5%	77.8%	63.9%	81.1%
25	7	83.0%	73.6%	81.9%	72.1%	84.8%	87.9%	80.6%
15	8	70.4%	66.6%	53.3%	56.3%	56.6%	39.0%	57.0%
Your Score	9	67.4%	54.1%	56.9%	64.8%	56.7%	51.2%	58.5%
20	10	64.9%	66.5%	70.1%	56.9%	40.9%	72.7%	62.0%
31	11	62.3%	47.4%	22.7%	38.4%	26.0%	93.0%	48.3%
16	12	61.0%	62.8%	54.5%	45.9%	41.7%	62.7%	54.8%
17	13	57.9%	42.1%	32.3%	71.6%	60.3%	60.3%	54.1%
33	14	56.8%	75.5%	64.8%	80.3%	79.7%	73.5%	71.8%
13	15	52.2%	34.9%	61.0%	52.8%	58.9%	48.7%	51.4%
24	16	48.9%	66.7%	86.9%	87.7%	83.6%	74.5%	74.7%
28	17	46.4%	45.5%	19.3%	40.3%	28.8%	32.4%	35.5%
27	18	43.7%	26.5%	31.5%	24.3%	22.2%	17.2%	27.6%
17	19	41.5%	28.4%	50.1%	48.1%	71.1%	81.0%	53.4%
23	20	39.1%	52.3%	57.1%	86.4%	87.7%	88.9%	68.6%
22	21	36.8%	18.7%	19.3%	52.9%	66.4%	64.3%	43.1%
12	22	36.6%	43.2%	33.1%	65.7%	69.0%	86.0%	55.6%
30	23	36.3%	22.6%	23.5%	85.8%	81.5%	70.3%	53.3%
29	24	34.1%	44.9%	50.2%	28.3%	48.9%	36.9%	40.6%
34	25	33.4%	37.9%	23.1%	21.7%	29.7%	22.6%	28.1%
18	26	32.6%	68.4%	80.4%	88.4%	83.8%	91.6%	74.2%
Monthly Average		58.2%	56.8%	56.4%	64.3%	64.3%	66.6%	61.1%

Individual Agent Performance Targets

Agent Performance Metric	Current Agent Performance	Agent Performance Target
Schedule Adherence	70.0%	90.0%
Call Quality	93.1%	93.1%
Customer Satisfaction	98.4%	98.4%
First Contact Resolution Rate	80.6%	80.6%
Agent Balanced Score	67.4%	84.6%

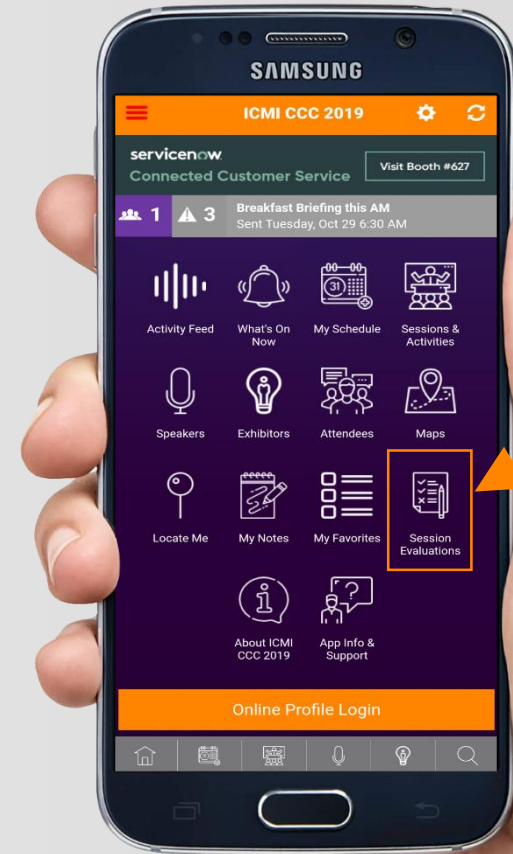
Summary...

1. Metrics Hierarchy with 9 Success Factors
2. Know the 80/20 Rule for Contact Center KPIs
3. Create a Balanced Scorecard
4. Cause-and-Effect Relationships are Very Powerful
5. Performance Targets are Based on Industry Benchmarks
6. Set Targets for the Top Quartile
7. Drive Targets Down to the Agent Level with a Scorecard

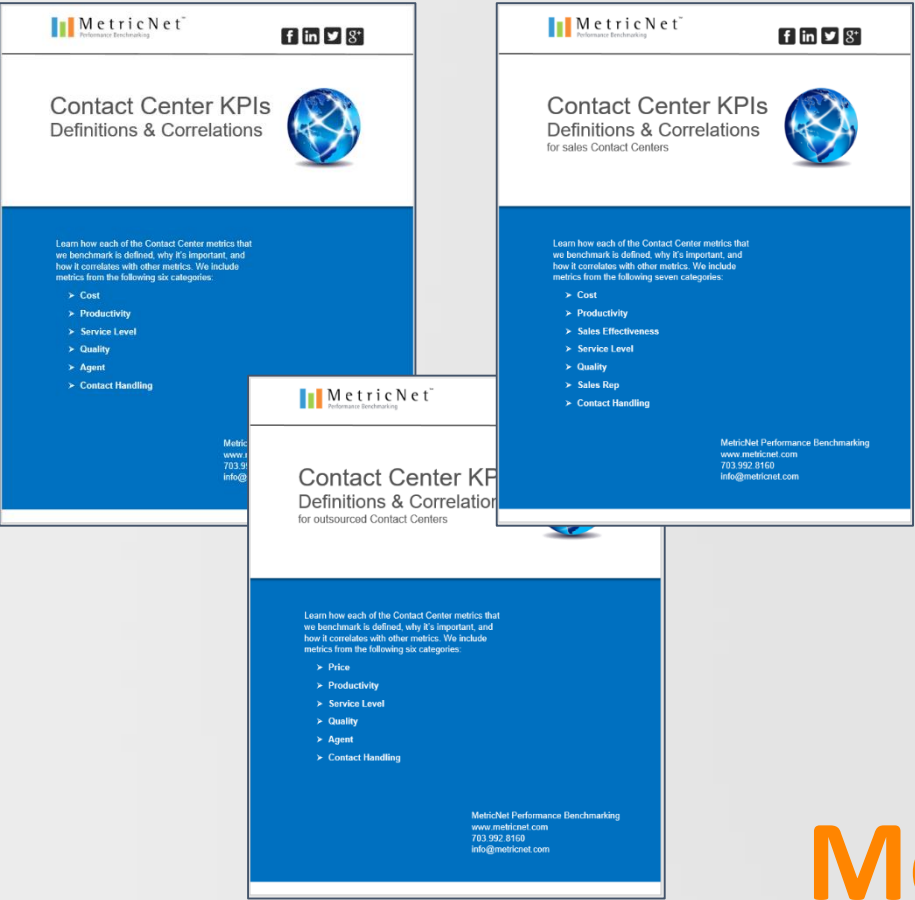
Questions?

THANK YOU FOR ATTENDING THIS SESSION.

Please complete the session evaluation form in the **App**



Download Three KPI eBooks & Today's Presentation



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Are Your Performance Targets on Target?
Jeff Rumburg, *Managing Partner, MetricNet, LLC*

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Session 301: **Ask the Experts: Mastering Your Metrics**

Justin Robbins, *Contact Center Evangelist, 8x8*

Todd Hixson, *Capacity Manager, Hulu*

Jeff Rumburg, *Managing Partner, MetricNet*



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Session 603:
**From Good to Great in 9 Months -
The Kinecta Credit Union Success
Journey!**

Jeff Rumburg, *Managing Partner*, MetricNet, LLC

Thank you!

Questions?



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Session 101:
**Are Your Performance Targets on
Target?**

Jeff Rumburg, *Managing Partner*, MetricNet, LLC

Your Speaker: Jeff Rumburg



- Co Founder and Managing Partner, MetricNet, LLC
- Winner of the Ron Muns Lifetime Achievement Award
- Named one of HDI's Top 25 Thought Leaders in 2016, 2017 and 2018
- 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

Contact MetricNet...

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Benchmarking is MetricNet's Core Business

Contact Centers

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

Information Technology

- Service Desk
- Desktop Support
- Field Support

Telecom

- Price Benchmarking

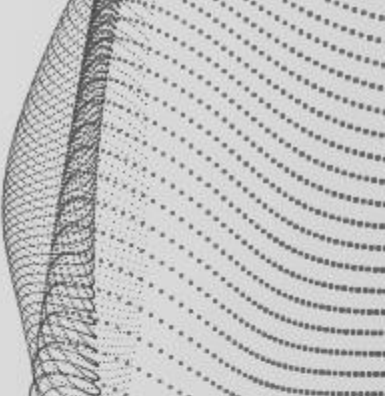
Satisfaction

- Customer Satisfaction
- Employee Satisfaction



Meet a Sampling of Our Clients

MetricNet Conducts benchmarking for Contact Centers worldwide, and across virtually every industry sector.



THANK YOU!