Contact Center Best Practices:
Unified Contact Center SWEET!

Agenda

- **Why consider management tools**
- **Contact center goals**
- **Contact center tools**
- **Common challenges**
- **Contact center tips**
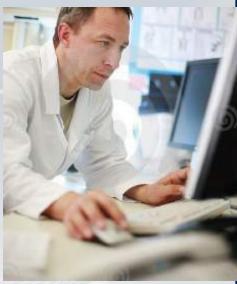- **Wrap up**

Why Consider a Management Tool?

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Simple Answer is…

"You Can't Manage
What You Can't Measure"

And if you don't Measure….
….You have no control
…. You can't improve
…. You lose money
….or worse.. You lose customers

Is This You?

How many calls did we take today?

How many calls did we lose?

What is the value of each call?

If the emergency services were called, would I know who made the call?

Are we making the best use of our carriers to get the best rates?

Can I see what's going on with my phone system right now?

Are my staff misusing the telephone? Personal calls, long calls, international calls?

Can I reward key staff, and identify staff that may need training?

Did You Know?

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95% of complaining customers will do business with you again if you resolve the complaint instantly (1)

Customer loyalty can be worth up to 10 times as much as a single purchase . (2)

It costs five to six times as much to get a new (first time) customer as it does to keep a current one(3)

1% cut in customer service problems could generate an extra $25m in profits for a medium-sized company over 5 years.(2)

It takes 12 positive service incidents to make up for 1 negative incident (1)

95% of complaining customers will do business with you again if you resolve the complaint instantly (1)

A dissatisfied customer will tell 9-15 people about it. (3)

a

(1) Lee Resource Inc
(2) TARP
(3) the White House Office of Consumer Affairs, Washington, DC.

Jurupa Community Services District

Recognized they needed improvement!

Challenge

- ➢ Growing business, old system couldn't cope with rising number of calls
- ➢ No insight into customer service
- ➢ Manual search for Customer data, for previous calls
- ➢ High abandoned call rate, and long hold times

Solution

- ➢ Avaya IP Office with Datel Call Sweet! Live
- ➢ Calls answered 3 times quicker
- ➢ 50% decrease in abandoned calls
- ➢ 40% less time on hold
- ➢ Quick access to info saves 20 minutes of "searching" per request

jurupa
Community Services District

Maintains water, street lights for over 110,000 people and over 160 acres of parks

"Our customer service manager uses Call SWEET! Live to make sure all the calls in queue are being answered by representatives without having to constantly walk around the call center"
 Tuan Phan. IT Administrator

http://www.datel-group.com/news/case-studies/jurupa-community-service-district/

Contact Center Goals

- **Improve productivity and reduce operating expenses**

- **Retain customers**

- **Generate incremental revenue**

- **Provide an outstanding customer experience**

- **Increase use of self-service systems**

- **Reduce agent attrition**

- **Identify reasons why customers call**

Contact Center Tools

- **Key Performance Indicators (KPI's)**
  - A set of metrics/reports for your communications
  - All incoming and outgoing calls, agents and groups
- **How do I use them?**
  - To evaluate performance for both the business and individuals
  - To Set goals
  - Track improvements

Common KPI's
- Abandoned Calls
- Speed of Answer (Time In Queue)
- Agent Utilization
- Opportunities missed
- Average handle time
- Service levels
- Overflow
- Employee Performance

Abandoned Calls

Why You Should Care

Callers 'hanging-up' while waiting for answer

- **Abandoned calls = <u>lost opportunities!</u>**

- **What is an acceptable abandon rate?**

  - Only you can decide!

  - What is acceptable versus cost of labor & technology and time to answer.

    - *How much is each 'lost' call worth to you?*

  - As you strive to reach 100% answer rate, labor costs rise to cope with 'peak' times and you may have 'idle' agents

Abandoned Calls

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- **Track Abandoned Calls**

  - Determine the average wait time before caller 'hang-up'

  - Help you to find the balance of acceptable 'loss'

- **Call Them Back!**

- **DATEL Tools**

  - Abandoned Detail Report

  - Call Summary with Intervals by Day/Hour

  - Click-to-Dial/Auto Dialer

✓**Increase revenue**
✓**Improve customer service**
✓**Maximize agent productivity**

Abandoned Detail Report

Hunt Group			
⊟ 2005 - Helpdesk	Total Calls 10		Avg Time to Abandon 0:09:45
	Call Time	**Calling Number**	**Time to Abandon**
	1/27/2012 9:25:48 AM	305-262-1292	0:02:00
	1/27/2012 9:39:52 AM	703-929-6680	0:00:28
	1/27/2012 9:41:06 AM	703-929-6680	0:00:52
	1/27/2012 9:46:23 AM	609-748-4414	0:02:42
	1/27/2012 10:42:12 AM	609-886-2005	0:17:48
	1/27/2012 12:29:53 PM	870-774-3561	0:04:26
	1/27/2012 3:20:26 PM	512-697-3285	0:04:20
	1/27/2012 3:38:09 PM	512-697-3285	0:57:30
	1/27/2012 3:57:37 PM	678-794-8024	0:04:28
	1/27/2012 4:50:50 PM	703-929-6680	0:02:56
		Total Calls:	10
		Avg Time to Abandon:	0:09:45

Total Calls 10   Avg Time to Abandon 0:09:45

Speed of Answer (Time in Queue)
Why You Should Care

How long a caller takes to be answered

- **No-one wants long wait times...**
  - Unhappy customers
  - Loyal customers become dissatisfied
  - Increased abandoned calls
- **Industry average: (vary across industries)**
  - 80% of calls answered in 20 seconds to 90% of calls answered in 10 seconds

Speed of Answer (Time in Queue)
What You Can Do

- **Determine 'peaks and troughs'**
  - Time of day, day of week, holidays etc and Staff accordingly
    - Utilize full time employees/agents
  - Establish acceptable Avg answer time
- **Use technology**
  - Mobile workers, home workers, 'twinning'
  - Offer alternatives Time in queue, IF, THEN….
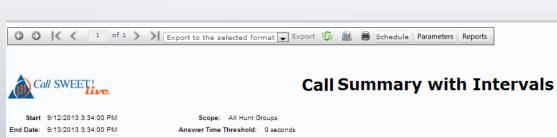- **DATEL Tools**
  - Real-Time Views
  - Wallboards
  - Call Summary with Intervals

✓**Reduce avg time to answer**
✓**Improve customer loyalty/retention**

Call Summary with Intervals Report

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Call SWEET! live

Call Summary with Intervals

Start 9/12/2013 3:34:00 PM Scope: All Hunt Groups Page 1 of 1
End Date: 9/13/2013 3:34:00 PM Answer Time Threshold: 0 seconds Run Date: 9/13/2013 3:35:00 PM

Hunt Group	Total Calls	Answered #	Answered %	Abandoned #	Abandoned %	Overflow #	Overflow %	Voicemail #	Voicemail %	15	20	25	30	35	40	45	50	55	60	>60	Avg Wait Ans	Avg Wait Ovr	Avg Wait Abn	Longest Wait Ans	Longest Wait Ovr	Longest Wait Abn	Average Hdl Time	Average Talk Time	PCA %
2005 - Helpdesk	23	18	78.26 %	5	21.74 %	0	0.00 %	0	0.00 %	10	1	2	0	3	1	0	1	0	0	0	00:00:1	00:00:0	00:00:3	00:00:4	00:00:0	00:01:0	00:02:25	00:02:24	4.35 %
2015 - HelpDeskBAK	2	2	100.00 %	0	0.00 %	0	0.00 %	0	0.00 %	2	0	0	0	0	0	0	0	0	0	0	00:00:0	00:00:0	00:00:0	00:00:0	00:00:0	00:00:0	00:00:17	00:00:17	0.00 %
4018 - CSLDev	11	1	9.09 %	10	90.91 %	0	0.00 %	0	0.00 %	1	0	0	0	0	0	0	0	0	0	0	00:00:0	00:00:0	00:01:0	00:00:0	00:00:0	00:03:0	00:01:26	00:00:40	0.00 %
4050 - TestingGroup	44	26	59.09 %	18	40.91 %	0	0.00 %	6	13.64 %	25	1	0	0	0	0	0	0	0	0	0	00:00:0	00:00:0	00:00:0	00:00:1	00:00:0	00:00:1	00:01:47	00:01:47	4.55 %
Totals:	80	47	58.75 %	33	41.25 %	0	0.00 %	6	7.50 %	38	2	2	0	3	1	0	1	0	0	0	00:00:1	00:00:0	00:00:2	00:00:4	00:00:0	00:03:0	00:01:57	00:00:02	3.75 %

Run Date: 9/13/2013 3:35:00 PM
Page 1 of 1

	Average Wait			Longest Wait		
60	Ans	Ovr	Abn	Ans	Ovr	Abn
0	00:00:1	00:00:0	00:00:3	00:00:4	00:00:0	00:01:0
0	00:00:0	00:00:0	00:00:0	00:00:0	00:00:0	00:00:0
0	00:00:0	00:00:0	00:01:0	00:00:0	00:00:0	00:03:0
0	00:00:0	00:00:0	00:00:0	00:00:1	00:00:0	00:00:1
0	00:00:1	00:00:0	00:00:2	00:00:4	00:00:0	00:03

Agent Utilization
Why You Should Care

- **Agents are your most expensive asset**
  - Average salary $29,325*
- **Do you know..**
  - How they are spending the day?
  - How they treat your customers?
  - Their knowledge and skill set?
  - How much time they actually spend 'on the phones'?
  - If they need training?

Agent Utilization
What You Can Do

- **Maximize these assets**
  - Utilize their time wisely and balance Incoming calls, outgoing calls
  - Other internal or clerical work at quiet times
  - Accurately evaluate agent performance
- **DATEL Tools**
  - Agent Snapshot
  - Calls Answered/Abandoned Summary
  - State Summary
  - Reason Codes/Disposition codes
  - Voice Recording

✓**Improve agent morale**
- **Happy agents = Happy customers!**

✓**Maximize *your* investment in *your* valuable 'assets'**

✓**Reward key staff**

✓**Identify training needs**

Agent Snapshot

	Total Calls	Handle Time			Talk Time		Hold Time	
		avg	max	total	avg	max	avg	max
⊞ Billy Bullis	46	0:06:41	0:43:28	4:34:14	0:06:40	0:43:28	0:00:01	0:00:22
⊞ Dan Conti	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
⊞ Dominic Metzger	28	0:05:20	0:39:34	2:08:11	0:05:20	0:39:34	0:00:00	0:00:00
⊞ Jason Litwin	57	0:03:43	0:24:22	3:24:56	0:03:43	0:24:22	0:00:00	0:00:00
⊞ Paul Diamond	18	0:03:43	0:13:42	1:03:11	0:03:43	0:13:42	0:00:00	0:00:00
⊞ Thomas Hoose	33	0:03:10	0:16:22	1:41:36	0:03:07	0:16:22	0:00:03	0:01:31
⊞ Tim Hurney	46	0:01:27	0:10:50	0:55:16	0:01:27	0:10:50	0:00:00	0:00:00
⊞ Will Smith	17	0:09:11	0:33:27	2:27:11	0:09:11	0:33:27	0:00:00	0:00:01
	245	0:04:22	0:43:28	16:14:38	0:04:21	0:01:31	0:00:00	0:43:28

...on Litwin		57	0:03:43	0:24:22	
⊞ 2005 - Helpdesk		0	0:00:00	0:00:00	
⊞ Incoming Direct		15	0:05:13	0:16:43	
⊞ Internal		6	0:00:32	0:01:01	
⊞ Outgoing		34	0:03:37	0:24:22	
⊞ Voicemail		2	0:00:20	0:00:37	

Calls Answered/Abandoned Summary by Agent

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Hunt Group		Total Calls	Answered		Overflowed		Abandoned	
			#	%	#	%	#	%
⊟ 2005-Helpdesk		58	44	75.86	0	0.00	14	24.14
	Agent	**Total Calls**	**Answered**		**% of HG Total**		**Opportunities Missed**	
	2169-Dominic Metzger		9	100.00	20.45		6	
	OTHER		0	0.00	0.00		0	
	2160-Paul Diamond		6	100.00	13.64		9	
	2179-Thomas Hoose		6	100.00	13.64		3	
	2144-Tim Hurney		1	100.00	2.27		19	
	VOICEMAIL		6	100.00	13.64		0	
	2180-Billy Bullis		9	100.00	20.45		1	
	2159-Will Smith		7	100.00	15.91		5	
Totals		58	44	75.86	0	0.00	14	24.14

Opportunities Missed
Why You Should Care

Refused Calls by Agent

- **Agents refusing calls:**
  - Longer Wait Times
  - Increase in abandoned & overflow calls
  - Increased burden/pressure on other agents can lead to high rate of attrition
- **Why refuse Calls?**
  - Lack of confidence
  - Lack of training
  - Laziness!

- 26%-33% turnover of agents annually*
- Average costs of hiring new agents - $4,000 *
- Average costs of training new agents - $4,800 *

*Response Design Corporation, 2009

Opportunities Missed
What You Can Do

- **Identify agents with 'opps missed'**
  - Understand why and then retrain them, or re-allocate to other skill sets
- **Use 'opps missed' to your advantage:**
  - Use as an agent performance metric
- **DATEL tools**
  - Opportunities Missed Report
  - Calls Answered/Abandoned Summary
  - Real-Time Views

✓**Improve agent retention**
✓**Reward key staff**
✓**Identify uneven workload distribution**
✓**Speed answer rates**

Opportunities Missed

2005-Helpdesk	Total HG Opportunities Missed :	46
Paul Diamond	Total Agent Opportunities Missed:	9
Dominic Metzger	Total Agent Opportunities Missed:	6
Tim Hurney	Total Agent Opportunities Missed:	19
Will Smith	Total Agent Opportunities Missed:	5
Thomas Hoose	Total Agent Opportunities Missed:	3
Jason Litwin	Total Agent Opportunities Missed:	3
Billy Bullis	Total Agent Opportunities Missed:	1
	Total Opportunities Missed :	**46**

Date Missed	Calling Number
1/23/2012 11:51:15 AM	312-335-2070
1/24/2012 3:18:16 PM	703-956-4000
1/25/2012 2:54:46 PM	857-228-1400
1/25/2012 3:28:39 PM	602-231-0102
1/26/2012 1:25:42 PM	814-761-1315
1/27/2012 9:41:59 AM	703-929-668
	Total Missed Calls:

Real-Time Views

Average amount of time to 'handle' each call

- **Measure individual agent performance**
  - How comes it takes you 5 minutes and 'Joe' 3 minutes?
- **Cost per contact rises**
- **Customer sat goes down**
- **Long handle time results in queues backing up**

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- **Maximize employee talk time**
  - Encourage efficient communications
    - 'One and Done'
  - Offer additional resources, training
- **DATEL tools**
  - Service Level Handled Performance
  - Extension Summary
  - 'Chat'
  - Voice Recording
  - CRM Integration

- ✓**More calls handled per day**
  - • **Increased revenue potential**
- ✓**Consistent behavior**
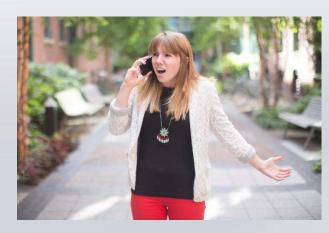- ✓**Shorter wait times**
- ✓**Improved Satisfaction**

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% of calls answered within 'N' seconds

- **Determines how you are providing service**

- **Is a measurable objective for your business**

- **Poor 'Service Level' could and probably would be affecting business**

  - Longer wait times, higher abandoned calls

Question
What is the industry Std SL?
Answer
There isn't one!
- You must determine what's right for your business
- Typically 80% of calls answered within 20 seconds

Service Levels

- **Agree on a company standard**
  - 80/20…70/30…90/10…
  - Use all of the previous KPI's to improve and maintain Service Levels

- **DATEL tools**
  - Service level answered performance reports
  - Alarms and alerts
  - Real-Time views
  - Implement IVR/self service

> ✓**Accountability for agent and call center managers**
> ✓**Differentiation for *your* business**
> - **Publish your SLA and be proud of it**

Service Level Handled Performance

Hunt Group		Total Calls	Handled		Handled In SL		Handle Out SL		Handle Time	
			#	%	#	%	#	%	avg	max
⊟ 2005-Helpdesk		58	44	75.86	24	41.38	20	34.48	0:05:05	0:43:28
	2169-Dominic Metzger		9	100.00	5	55.56	4	44.44	0:03:57	0:16:13
	OTHER		0	0.00	0	0.00	0	0.00	0:00:00	0:00:00
	2160-Paul Diamond		6	100.00	2	33.33	4	66.67	0:01:59	0:03:24
	2179-Thomas Hoose		6	100.00	2	33.33	4	66.67	0:04:39	0:12:04
	2144-Tim Hurney		1	100.00	1	100.00	0	0.00	0:01:16	0:01:16
	VOICEMAIL		6	100.00	6	100.00	0	0.00	0:00:40	0:01:28
	2180-Billy Bullis		9	100.00	5	55.56	4	44.44	0:06:38	0:43:28
	2159-Will Smith		7	100.00	3	42.86	4	57.14	0:11:52	0:33:27
Totals		58	44	75.86	24	41.38	20	34.48	0:05:05	0:43:28

Overflow

Agents, groups, trunks directed to alternate

- **The Good**
  - Used to ensure calls get answered within your SLA
  - Can be used as 'skill sets' group to group
- **The Bad**
  - Too much of a good thing...
  - Most calls should be answered at the primary
  - Can result in opportunities missed

- **Intelligent overflow**
  - Skills or just answer time?
- **Monitor and adjust**
  - Most calls should not go to the 2nd group. If they are, your customer may have already waited too long!
  - Let agents jump in and out of group
- **DATEL tools**
  - Service level and performance summary reports
  - Call routing (pbx)

✓**Reduce transfers – Agent best to handle call first**
✓**Maintains SLA**
✓**Reduce wait time & abandoned calls - but careful its not a catch all!**

Service Level Summary Overflow

Answered		Ans. In SL		Ans. Out SL		Answer Time		Overflowed		Ovr. In SL		Ovr. Out SL	
#	%	#	%	#	%	avg	max	#	%	#	%	#	%
44	75.86	26	44.83	18	31.03	0:00:16	0:57:30	0	0.00	0	0.00	0	0.00
44	75.86	26	44.83	18	31.03	0:00:16	0:57:30	0	0.00	0	0.00	0	0.00

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**We've focused on the Call Center,
what about the rest of the business?**

- **Big Chunk Of Change…**
  - Personal Calls
  - Toll fraud
  - Lost employee productivity

- **Do You Know…**
  - How your employees are utilizing their time – really on with a client?
  - If your team is meeting their call quota?
    - And if they are, are they productive calls?

- **Track Extension Activity**
  - Get insights into all calling activity (incoming, outgoing, internal, and voicemail)
  - Simply by announcing that you will be tracking calls is enough to reduce personal calls by up to 90%
- **DATEL Tools**
  - Extension duration summary
  - Extension detail

✓**Reduce costs due to personal calls**
✓**Increase employee productivity**
✓**Increase employee accountability for phone activity**

Extension Duration Summary

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User-Extension	Inbound Calls	Inbound Duration (H:M:S)	Outbound Calls	Outbound Duration (H:M:S)	Total Calls	Total Duration (H:M:S)
2003-2003	1	0:00:12	0	0:00:00	1	0:00:12
2115-2115	0	0:00:00	1	0:00:06	1	0:00:06
2118-2118	1	0:00:00	0	0:00:00	1	0:00:00
2154-2154	1	0:01:12	2	0:05:00	3	0:06:12
2180-2180	1	0:54:54	1	0:01:12	2	0:56:06
501-501	1	0:02:42	1	0:02:42	2	0:05:24
9-9	0	0:00:00	1	0:02:42	1	0:02:42
9551-9551	2	0:05:36	1	0:02:48	3	0:08:24
Dan Lemke-2113	0	0:00:00	2	0:01:30	2	0:01:30
Dmetzger-2169	1	0:00:48	0	0:00:00	1	0:00:48
Helpdesk-2005	1	0:00:06	0	0:00:00	1	0:00:06
Shawn-2136	1	0:01:36	2	0:13:30	3	0:15:06
Tim-2144	3	0:08:11	3	0:06:54	6	0:15:06
Voicemail-9501	67	0:15:24	12	0:04:54	79	0:20:18
Will-2159	3	0:06:54	0	0:00:00	3	0:06:54
-						
-						

Inbound Totals		Outbound Totals		Grand Totals	
Calls	83	Calls	26	Calls	109
Duration (H:M:S)	1:37:36	Duration (H:M:S)	0:41:18	Duration (H:M:S)	2:18:54

Common Challenges

- **I want my agents to know what's happening in the call center**
  - Provide each agent a wallboard
  - Have agents set up their own custom user displays
  - Use security settings to restrict permissions based on roles
- **Calls ring to agents phones when they are not there!**
  - Use supervisor controls to log phones out of group (and in!)

Common Challenges

- **I want more detail on what my agents are doing**
  - Use reason codes
    - Assign codes to just about anything for comprehensive view
- **Sometimes my agents need to call customers back**
  - Use chat to try to resolve issues first time

Common Challenges

- **I'm trying to better handle a customer dispute.**
  - Use Cradle-to-Grave reports to track call history
  - Use voice recording feature – avoid 'he said, she said'
- **I want to better categorize calls**
  - Use disposition codes to tag calls
- **I have multiple sites to manage, but I can't be in 3 places at once!**
  - UCCS can collect call data across multiple locations and centralizes the information

Contact Center Tips

- **Set up wallboard**
  - But don't overload!
- **Give your agents views**
  - But restrict what they see
- **Train your agents**
  - And provide regular reviews
- **Keep track of agent activity**
  - Utilize your most valuable asset

- **Create alarms**
  - Let the software do the work
- **Schedule reports**
  - Reports you want, when you want
- **Set and maintain your service levels**
  - Your one, best metric
- **Use the technology**
  - PBX, IVR, Mobility

Wrapping Up

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- **DATEL provides solutions for all verticals, sizes and needs**
- **Manage costs**
  - Receive alerts for toll fraud, telephone misuse, long distance, etc.
- **Improve business productivity**
  - Speed and Automate dialing
  - Integrate to CRM solutions
- **Improve customer service**
  - Monitor peaks and troughs, Staff appropriately
  - Record calls and train staff

| Call Accounting |
| Contact Center |
| CRM Integration |
| Voice Recording |
| Automated Dialer |
| Click-To-Dial |

Check out the DATEL blog at http://info.datel-group.com/blog for more best practices on using your contact center management solution