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The Supervisor Desktop

Why is the supervisor important to the contact center?

The supervisor's role within a contact center can be thought of to be akin to that of a sergeant in the army: the link between the footsoldiers (agents) and officers (management), who have to understand the strategy and direction of the company, as well as manage the individuals who make up the team that does the actual work.

Supervisors - usually in charge of teams of 10-20 agents - have an average tenure of 3½ years, and have almost always excelled in the position of agent before being promoted, rather than being recruited directly into the role with no previous agent experience. However, without the right support, training and tools, a good agent will not necessarily make a good supervisor, as the latter is a management position which also requires a high ability to multi-task. Despite the big step-up in responsibility, supervisors earn only around 25% more than an experienced agent (slightly over \$40,000 on average).

The front-line supervisor is widely acknowledged to be the key to a successful contact center, having roles and responsibilities far in excess of their official job description, most of which impact directly upon the performance of the contact center.

Supervisor activity	Importance to the contact center
Manage agent performance to required service levels	Missing service levels has a major impact upon cost and customer satisfaction
Review agent career goals against the requirements of the contact center	Lack of opportunity for promotion and advancement seen as a top 3 issue for attrition. However, the needs of the business must also be considered
Identify agent training needs and provide opportunities for learning	Through a combination of silent monitoring, scorecards and call recording, supervisors can develop a good understanding of their team's needs, and schedule training (whether eLearning or away from the desk)



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Supervisor activity	Importance to the contact center
Increase agent skills through mentoring, coaching and training	84% of contact centers using mentoring as a training technique, which involves more knowledge and skill transfer and often a more formal setting, with specific time set aside, perhaps with a small group rather than an individual. Supervisors will spend around 1.5 - 2 hours per agent per week on coaching
Identify the attributes of agents who are performing well and encourage others to follow suit	Top agents outperform poor agents by 3 to 1. Supervisors identify the best-practice behaviors and characteristics of top agents (making sure that they are aligned with the brand and strategy of the organization) and propagate these to other agents
Troubleshoot technology problems	Supervisors are the first port-of-call when a technology issues has been found, and have to sit with agents to see if they can replicate the conditions in which the error occurred and document this for the IT department to deal with. Recording technology can be used to capture screens, data and voice automatically which fit the given criteria.
Answer questions and distribute relevant information	The supervisor is a hub of information - upwards from agents who have found specific issues and answers, and downwards from management who wish to make things known. The supervisor needs tools to collate and distribute relevant data in real-time to the right people
Create and alter forecasts and schedules	Supervisors need to use workforce management solutions to plan their schedules, but also have to have the ability to change on the fly as internal and external factors kick in, otherwise service levels will be missed
Handle escalated calls	Supervisors can improve first-call resolution rates by being skilled and supported enough to deal with exceptional and difficult calls which an inexperienced agent simply could not handle



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Supervisor activity	Importance to the contact center
Monitor calls - whether random or exceptional - and provide real-time help if required	Real-time monitoring of calls (perhaps looking for voice stress or key words) can bring in a supervisor to listen to a live conversation, perhaps joining in if the business's needs are not being met or the brand is being damaged by off-message agents
Liaise with the rest of the organization	The supervisor, unlike the manager, will listen to and deal with multiple calls each day, as well as understanding exactly what agents are listening to and talking about. This gives the supervisor an understanding about what customers are saying, which can be fed into the wider enterprise and learned from. Supervisors will also deal with ad-hoc requests from other departments and areas of the contact center as they have all of the information and knowledge required - although it may take a very long time to find in all the data to which they have access
Stand as examples of how to behave and perform	Supervisors are usually top agents as well, and are seen as role models by their teams. If supported by superior business intelligence and reporting tools, they will not miss a trick

Contact center managers may not always be aware how much extra-curricular activity their supervisors have to perform, with the list of work growing ever longer. This combination of too much data, not enough actionable information, too few hours in the day and excessive expectations can mean that supervisors underperform through no intrinsic fault of their own. The right tools, processes and technology solutions can go a long way to alleviating these issues, and this is what the rest of the chapter will study.



Multiple KPIs and the unified supervisor environment

Today's agents and supervisors must deal with multiple applications - ACD, CRM, workforce management, quality management, performance management, order entry, knowledge base, etc. However, applications still reside in separate silos, each dealing with different information and presenting a different user interface. As a result, supervisors usually see multiple views of the contact center, and these confusing displays waste time, degrade service quality and interfere with productivity and effectiveness.

These siloed applications need a unified and customizable approach which integrates them and presents the information that is relevant to the situation in a way that the supervisor will find most useful, in real-time.

As supervisors have a limited amount of time to spend coaching each agent - usually no more than two hours per agent per week - it's vital to use the same performance measurements at both supervisor and agent level. In this way, the real-time call statistics being reported to the supervisor are the same metrics that the agent is being measured against, and which are also aligned with the aims of the wider contact center so that gaps in agent and team performance can be easily recognized.



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As the following chart and table indicate, there is an increasing trend to measure performance against real-time KPIs (key performance indicators) that are based upon the wider strategy of the organization, rather than just standard ACD metrics.

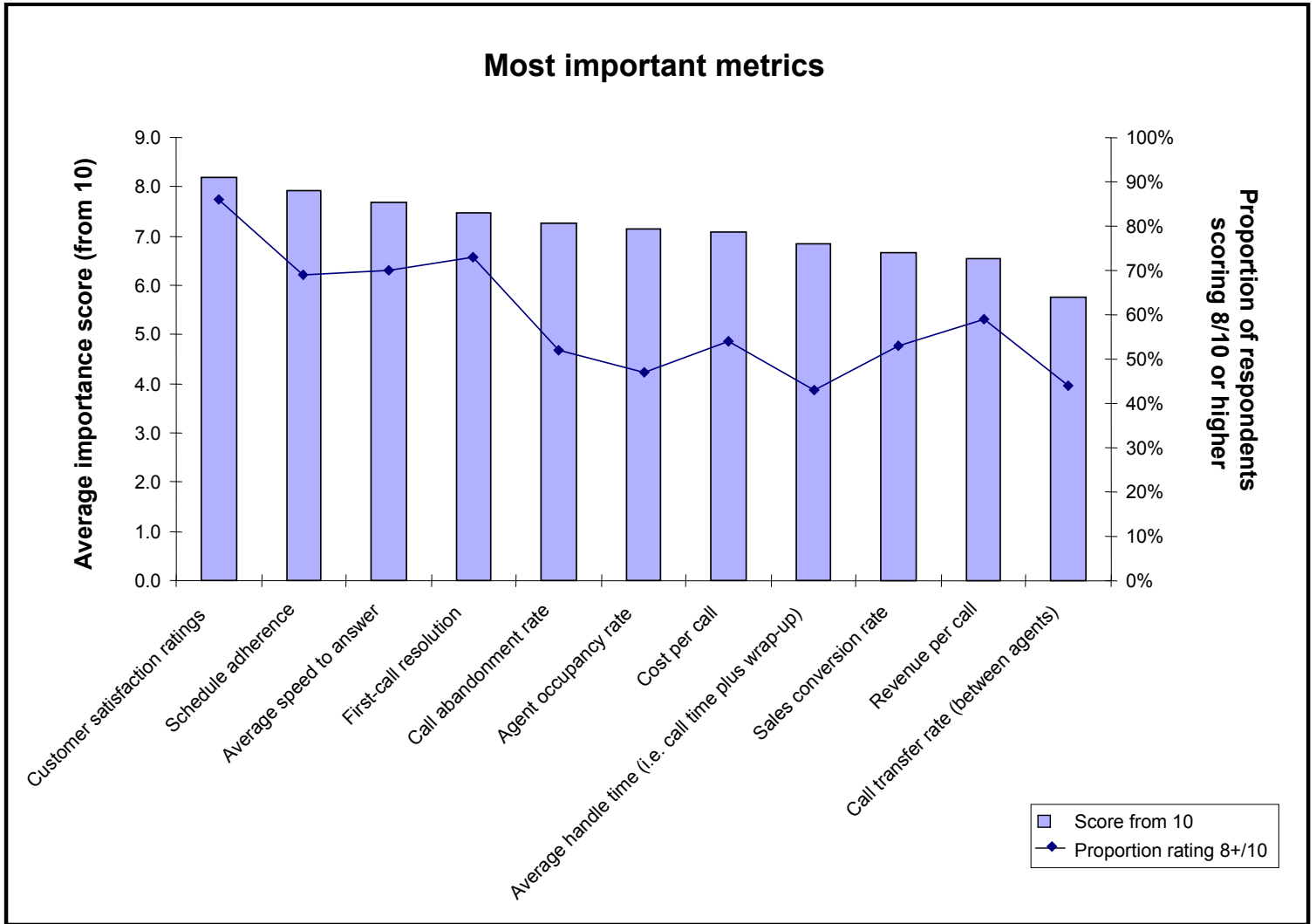




Table 124: Most important metrics

Metric	Importance (scored from 10)	% of respondents rating this 8,9 or 10
Customer satisfaction ratings	8.2	86%
Schedule adherence	7.9	69%
Average speed to answer	7.7	70%
First-call resolution	7.5	73%
Call abandonment rate	7.3	52%
Agent occupancy rate	7.1	47%
Cost per call	7.1	54%
Average handle time (i.e. call time plus wrap-up)	6.8	43%
Sales conversion rate	6.6	53%
Revenue per call	6.5	59%
Call transfer rate (between agents)	5.8	44%

Supervisors are now being asked to track and measure performance using many of these metrics, which are provided by numerous systems. A non-unified supervisor desktop environment will make it virtually impossible to get a coherent and accurate view of the agents' or contact center's performance.

The **Customer Satisfaction Rating** is a metric often used in and valued by today's contact centers, with customer satisfaction directly impacting upon revenues and profits, in terms of customer attrition, recommendations, higher share-of-wallet and premium pricing capabilities. There is some debate as to whether a 'satisfied' customer is actually enough, or whether a 'delighted' customer, as a far more enthusiastic and loyal advocate of the company is the state that should be aimed for.

Schedule adherence is a metric that looks to help with the fine-tuning of a contact center's labor force, so that calls are answered swiftly, but that agents are not sitting idly waiting for calls. It is a metric that at first glance is of more importance to supervisors and managers than to customers, although the impact of getting schedules wrong can be catastrophic for efficiency, cost and performance.

Average speed to answer is a metric which is easily measured, and forms a vital view of the contact center's staffing levels as well as impacting directly upon the customer experience. As such, it is similar in nature to the call abandonment rate. Contact centers should of course consider the amount of time that a customer spends in the IVR segment of the call when considering the 'speed to answer' metric - as the customers themselves surely do so.

First-call resolution is a difficult metric to track accurately, as many contact centers do so based upon their agents' or supervisors' opinions of the conversations, rather than the customers' own views. A short IVR announcement at the end of the



conversation asking for the customers' views could go some way to resolving this as is explained later in the chapter.

Call abandonment rate was placed in the no.1 position in the UK 's contact centers, but only is rated at 5th in the US. This metric indicates whether the contact center is coping with its workload, and has a strong impact upon customer satisfaction as well. In a sales-driven operation, high levels of call abandonment have a definite negative impact upon revenues as well.

The **agent occupancy rate** is made up the call-time plus wrap-up, that is, the proportion of time that each agent spends on dealing with the call itself and the actions deriving from it. A laborious wrap-up time caused by slow back-office systems or lack of familiarity from the agent's perspective, can go some way to producing high occupancy rates, which looks good at first glance, but is actually worse for the business in these cases.

Cost per call is a very complicated metric that is difficult to get correct. However, senior non-contact center management understand how cost figures impact the business more than occupancy or call abandonment rates, although these have an impact on all parts of the business. At the most basic level, cost per call can be calculated by dividing the overall spent budget of the contact center by the number of calls, although this does not take into account abandoned calls or where the customer has had to call multiple times to get a resolution (a situation which in fact brings cost per call down, although being negative to both business and customer). Neither does it take into account the effect of failure demand - where the contact center cleans up after processes elsewhere in the business go wrong, leaving the contact center to sort them out. As such, it should be viewed with caution.

As mentioned previously, **average handle time** (i.e. call time plus wrap-up) is a traditional metric from the days when contact centers were focused upon call throughput. It is perhaps an old-fashioned metric now, that does not fully take into account the issues of quality or first-call resolution, but it is still tracked in most contact centers. Input from supervisors as to the causes of long handle times is vital to understanding whether there are problems at an agent or contact center level.

Sales conversion rate is a metric that is key to the workings of a sales-focused operation, and which is measured on an agent or team level.

Revenue per call is restricted to sales-focused operations, where revenue is the reason for the operation in the first place. Taken at an agent or team level, such as is the case with the sales conversion rate, this metric identifies the best-performing sales agents, and is useful for identifying training and coaching requirements.

The **measurement of the call transfer rate between agents** is less-often tracked, which is a missed opportunity. A case can be made for this metric indicating training needs at the individual agent level, a failure in the initial IVR routing or a need to update FAQs or other information on a website (for example, a spike in this metric might be driven by a recent marketing campaign which has confused some customers,



creating a high level of calls about the same issue). Supervisor-level tracking and call recording in cases of high transfers should identify the issue.

What tools and solutions are available to help the supervisor?

The supervisor's role requires that performance, efficiency, effectiveness and quality are constantly monitored, at both team and agent level. The supervisor requires a wide yet unified toolset to do this effectively without becoming bogged-down in unnecessary data.

Agent monitoring tools

Agent performance can be reviewed in real-time through silent call monitoring and scoring, with the supervisor also able to step in to a conversation where necessary. Monitoring is a very widely-used application, with 86% of respondents allowing supervisors to listen into live conversations.

Table 125: Use of call monitoring, by vertical market

Vertical market	Use of call monitoring
Finance	100%
Insurance	100%
Travel & Leisure	100%
Outsourcing	98%
Retail & Distribution	94%
Services	78%
TMT	73%
Healthcare	46%
Average	86%

Automated monitoring systems can identify calls where the agent is moving away from what is required (perhaps a trigger phrase or word is used, or the elapsed time is outside set parameters), and the supervisor can enter the conversation in real-time, or listen-in and coach the agent afterwards. This is especially useful in the case of virtual contact centers where the supervisor may not even be at the same physical location as the agent.



Post-call surveys

Direct and immediate feedback at the end of a call provides supervisors with real-time views on agent performance and customer satisfaction, allowing instant changes to be made. It may be that the external score (customer satisfaction) does not coincide with the internal score (quality and performance), suggesting that there are issues to be addressed which may not have been identified previously.

Table 126: Effectiveness of customer satisfaction measurement methods

Customer satisfaction measurement methods	Average	Proportion of respondents marking this as 8, 9 or 10
IVR session offered immediately after the call	7.0	50%
Outbound telephone survey carried out by a neutral third-party	6.3	42%
Written survey	6.3	38%
Outbound telephone survey carried out by the company	6.0	43%
SMS survey	3.7	14%

The preceding table shows that contact center managers agree that the most effective way to measure customer satisfaction is through an IVR session immediately after the call, which is immediate, can be linked to a specific agent (and thus used for scoring and coaching) and which can feed directly into the workings of the contact center in real-time.

Performance management

Many of the gaps noticed in respondents' current performance management solutions talk about integration, and the absence of the data that are needed to get a complete picture of what is happening in the whole contact center.

Agent scorecards record performance against key metrics: first call resolution, revenue, AHT, quality and adherence. However, finding the reason for an unsatisfactory score can require extensive searching through multiple data sources and archives. A unified approach more efficiently and effectively relates performance to specific contributing statistics. Not all relevant data comes from an ACD - agent performance scorecards and informed comment on the types of calls being received are also part of understanding the overall picture, thus closing the loop between quality assurance at a agent level and optimizing the performance of the contact centre as a whole.

With a unified approach, a supervisor views a composite performance management scorecard with a single value that represents performance in a number of areas: first call resolution, revenue, AHT, quality, adherence, etc. Using a streamlined process, the



user drills through the data and views contributing scores in each area—quality scores, for example. The user then drills down further and views the recording and evaluation of a particular quality score, relating that specific instance to the top-level composite score. The facts behind the top-level score are discovered without time-consuming searches through multiple sources.

Training identification and delivery

Training is a very significant expense for a contact center, with an average of almost \$2,000 per agent per year being spent on ongoing training, amounting to an industry-wide annual training cost of \$6.1bn.

However, training is not a 'one-size-fits-all' investment. Alongside the standard product and system training that all agents require, the supervisor must also understand agents' individual needs, based on their actual performance.

Whereas previously supervisors had to assess an agent's training needs entirely manually, quality monitoring and recording solutions can suggest gaps which need addressing, and push web-based training courses to agents at low-volume times. This is done through linking the quality monitoring technology to the workforce management solution to schedule the training at a suitable time, pushing it to the agent automatically.

Reporting and business intelligence

Another of the supervisor's many roles is to identify, collate and distribute business intelligence - not just raw data - making sure the results go to the correct parts of the contact centre and wider organization.

By collecting and analyzing data, tools can be used to report assessment results at all levels - supervisor, team or agent - which can highlight the attributes of a successful team. By reviewing these assessments, supervisors can learn from each other. Additionally, best-practice calls can be saved and used by agents so that they learn from them.

At a higher level, the wider enterprise can also be provided with business intelligence gleaned from consolidating supervisor-level reports. It is vital to gain an understanding of the type of calls that the contact center is receiving, as well as how well it is coping with them. Understanding and using all of this input at a micro- as well as macro-level means that the contact center equips itself better to address its performance, scheduling and training needs, making itself more effective and providing a better service to its customers.

From a technical viewpoint, recording and reporting is also used to report exactly what happens before a technology system fault occurs, as it is of great importance to a business's IT department to understand the exact sequence of events that occurs before a fault, so they can duplicate it and then repair it.



Real-time service level management tools

Much of the supervisor's time is spent making sure that the team is performing to agreed service levels, and improving efficiency and effectiveness. There are a number of specific applications and tools that help in this ongoing process.

- **What-if scenarios:** 61% of respondents use 'what-if' scenarios - hypothetical models that give an idea of staffing requirements and service levels depending on whether certain events happen, such as a new TV campaign driving up calls, a 'flu epidemic keeping agents off work or a self-service option going live. Practicing their responses in virtual environments can mean the right decisions are made quickly by supervisors when the worst happens.
- **Messaging to teams and agents:** electronic team messaging, especially in a virtual environment, is vital to keeping to the same message. Supervisors can immediately let agents know about changes in service levels, or even the answer to a question which is suddenly being asked by numerous people. Supervisors can also make changes to customer messages, informing them within the IVR announcement of quick fixes, or awareness of a specific issue which is being dealt with.
- **Queue and team management (real-time reskilling):** the unified supervisor desktop allows supervisors to change agent groups based on the skills required to handle specific issues at certain times. The ability to change schedules very quickly was seen as vital, especially with large operations, with only 15% of these respondents stating that this was not important to them.
- **Automated processes:** 48% of contact center processes are initiated manually, with a further 40% a mixture of manual and automation, which is not the optimal way to manage processes, and can lead to delay and error. A better way of dealing with multi-step processes is to automate all of the steps that follow logically from the initial change or initiated process. For example, if a scheduled training session will impact too negatively on the future service level, the automated scheduling tool can search for and select a better time, alter each agent's individual schedule and trigger alerts to inform each agent of the new time.
- **The customized supervisor desktop and automated alerts**

The supervisor can be provided with a single console screen that contains all of their key metrics and alerts that are triggered at certain user-defined parameters, even though the logic itself may be spread across various systems. This unified environment means that they can react more quickly and accurately to issues that arise, and the troubleshooting capability may follow them around the contact center by sending a page or text message as required.

66% of respondents use supervisor dashboards, which give an at-a-glance, real-time view of the contact center to the supervisor, visually flagging up poor performance at a team and agent level.



Automated alerts can trigger once performance slips below a pre-set level, and be targeted at management, team leader or even agent level. These are used in 56% of respondents' contact centers.

Wallboards, showing key statistics at a team or center level, are used in 56% of respondents' operations.

Table 127: Use of real-time monitoring solutions

Real-time monitoring functionality	Proportion of respondents that use this functionality
Supervisor dashboards	66%
Automated alerts	56%
Wallboards	56%

Dashboards are more widely used in larger operations, whereas the use of alerts and wallboards are spread more evenly across size bands.

Table 128: Use of real-time monitoring solutions, by contact center size

Contact center size / Real-time monitoring functionality	Small	Medium	Large	Average
Supervisor dashboards	53%	73%	77%	66%
Automated alerts	53%	57%	60%	56%
Wallboards	53%	55%	61%	56%



Workforce management

Fulfilling service levels while managing costs is a repetitive cycle, requiring several key processes to be completed. Feedback from each stage means that the enterprise can continually improve its efficiency and become more confident in future predictions.

Before any staff planning can be done, an enterprise first needs to understand what has happened in the past. A solution which provides historical data from entire customer contacts (i.e. from CTI as well as the ACD) means that scheduling can take place in a more realistic way. Enterprises should also be able to factor in exceptions, such as advertising campaigns, training and public holidays, and view when the best time for a meeting or training session will be, and measure the impact on the rest of the contact center.

The next step is scheduling. The enlightened enterprise takes agent preferences and skill sets into account when scheduling. The "standard agent" approach to solving resource issues (i.e. treating one agent the same as any other) will cause problems with both agent satisfaction and customer service levels. Yet the business's needs must come first, so a scheduling supervisor will have to find the best way to match the company's requirements with those of its employees. On average, contact centers schedule between 3 and 4 weeks in advance.

Once the schedule is live, adherence - the ability to compare forecasts with reality, and learn from mistakes - is the next step. Sophisticated scheduling and forecasting is useless without the opportunity for improvement brought about by adherence monitoring. Real-time adherence allows supervisors to see exactly what is happening, and can alert them to deviations from the expected activity, allowing them to make changes before major problems occur. Adherence allows a supervisor to fine-tune the team's activity, and the majority of respondents (83%) compare the forecasts with the reality, in order to learn and keep improving, which is vital to successful workforce management. Without measuring adherence and understanding any errors, the business will be doomed to make the same mistakes over and over again.

90% of respondents use some form of workforce management solution, even if it is just a simple set of Excel macros that have been developed in-house over the years. 37% use a third-party application and 40% use a formal in-house developed application. (NB figures add up to more than 100%, as respondents may use more than one variety of workforce management solution).

Table 129: Use of workforce management solutions

Type of workforce management solutions	Proportion of respondents
Third-party application	37%
In-house development	40%
Excel spreadsheet or similar	45%
None	10%

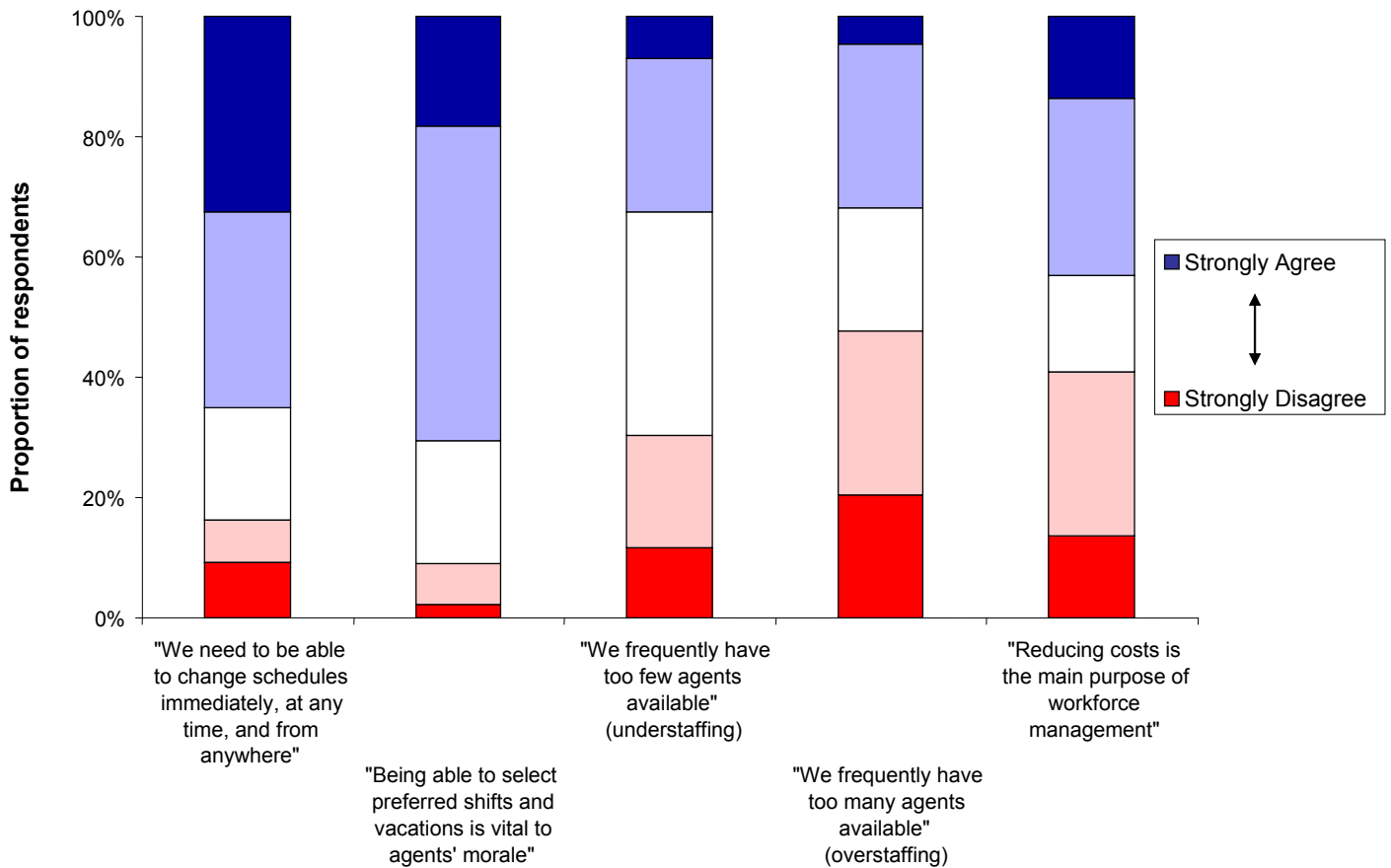


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This year, 53% of respondents use workforce management to allow agents to request the shifts and holidays that suit them, a big step up from previous years. Quite apart from the benefit of reduced supervisor time, this functionality helps to get direct buy-in for workforce management from the people whom it will affect. Statistics around historical and expected daily call volumes can help to set vacation availability, as well as schedule forecasting and planning.

Employees can get defensive about change, and may perceive workforce management solutions as something which is being introduced to keep a tighter rein on them: explaining the tool is there to help everyone get a fair amount of the right work, and point out the empowering aspects to it (e.g. the ability to request specific shifts/holidays) is more likely to get a positive response - in fact over 70% of respondents agreed that giving agents the ability to select preferred shifts and vacations had a positive impact on morale.

Views on workforce management





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The ability to change schedules quickly was seen as generally important, especially with large operations. There was also strong agreement across the board that allowing an agent to register a preference for a shift and holiday was very positive for morale, something especially felt in smaller contact centers.

Generally, overstaffing was rarely seen as an important issue, unlike understaffing, which large contact centers in particular found to be more of a concern.

Extending the boundaries of the contact center

Often, agent teams and external contact center resources operate separately, each with its own set of communication tools, and barriers between groups can present challenges when non-contact center workers are needed to help resolve a call.

Typically, if an agent needs outside assistance, the agent puts the caller on hold and phones around the rest of the enterprise to see if an expert is available. This hit-or-miss process can frustrate both the calling party and the agent. By integrating the agent's collaboration toolset with enterprise presence tools, this process is both simplified and extended.

Using integrated presence capabilities, the agent can quickly determine if another agent or expert is available to help by viewing the teammate's current ACD state or presence state and initiating a chat. Call data can also be shared with non-ACD workers for context as well as to expedite the progress of the call. This helps first-call resolution, customer satisfaction, increases revenues and reduces unnecessary future calls.

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