How to Succeed with Contact Center Analytics
You and your executive team likely recognize the potential value of contact center analytics. Timely insights into customer behavior and experiences give your company an opportunity to outpace the competition, nimbly pivot to meet new customer needs and quickly respond to issues. The result? Longer-term, more loyal customers, and happier, more engaged contact center staff.

So why do so many call center analytics deployments fail to meet their full potential—or even simply meet basic executive expectations? We at Calabrio commonly see three main reasons for this frequent disappointment:

• Confusion on what “analytics” really is, or can be
• Inadequate pre- and post-deployment planning
• Lack of ongoing focus, resources and funding

But it doesn’t have to be this way. With the right approach and continued consistency, you can realize powerful business benefits from call center analytics. Here's how.
1. GET SAVVY ABOUT ANALYTICS

It’s all about the data—or is it?

First and foremost, you and your executives need to be on the same page regarding the definition, purpose and outputs of analytics in your contact center. Otherwise, important analytics-uncovered insights may fall on deaf ears.

Today's “big data” world is data-heavy and data-rich—as a result, for many people “analytics” is synonymous with “hard numbers.” They find comfort in easily digestible salesforce.com reports and executive dashboards showcasing charts with lines that aggressively move up and to the right.

But today's rich analytics is so much more. It's about representation, not just hard data. It uses speech analytics, text analytics and desktop analytics. It extends beyond basic customer satisfaction and net promoter score (NPS) surveys so you get a true, authentic flavor of your customers across a broader spectrum of interactions (phone, chat, email, etc.). Thanks to this wider, more subjective spectrum, you can more easily identify root causes and resolve challenges plaguing your business.

Despite the potential of this new-world analytics, some stakeholders may be reluctant to relinquish their need for hard numbers and dollars earned/saved. But this surrender isn’t a suggestion—it’s a mandate. There are, however, ways you can help them adjust to this new way of thinking:

• Consistently communicate how analytics-based findings drive positive progress against company goals. Agree upon a defined set of metrics against which to measure improvement. These metrics should line up to key corporate objectives, such as growing revenue, increasing customer satisfaction or decreasing customer turnover. Compile these metrics into an easy-to-read report that succinctly explains what the data tells you; this could be a combination of data, observations, inferences and hypotheses. Don’t assume executives will connect the dots—clearly explain within the report how the findings tie back to company goals. Distribute this report each week to leaders and decision makers within the organization.

• Tell insight-based stories, succinctly articulating how analytics delivered the findings. People remember stories, not stats. So tell the story of each analytics-based project. Explain what your hypothesis was and why; how you gathered and analyzed various data to prove or disprove that hypothesis; what the most important (sometimes unexpected) findings were; actions taken because of the data; and the results to-date from those actions. For bigger projects, you might use a customer journey or customer experience map. Explain a customer’s emotions and experiences during each step of that journey, and how analytics helped alleviate pain and amplify satisfaction.
• **Ground your subjective findings in numbers whenever possible.** Stakeholder evolution takes time. Whenever you can, weave relevant hard numbers into your stories, so stakeholders have something tangible to anchor to while they digest the other, more subjective findings you present.

• **Avoid “assumption”—use “hypothesis” instead.** While common in data analysis, the word “assumption” can be a dirty word in business. Leaders may associate it with error-based decisions, wrong paths taken or just plain laziness. Better to reassure them by aligning with the trusted scientific method and use “hypothesis” when communicating what exactly it is you’re trying to prove/disprove.

• **Tune your message for your audience.** Few stakeholders can keep up to the subject matter expertise possessed by your data scientists and business analysts. If you want stakeholders to get comfortable with and value analytics-based efforts, you need to communicate with them in a way that makes sense. Skip the jargon and in-depth details—stick to an “executive summary” approach that features succinct, tangible findings and examples. If they want more detail, they’ll ask for it, and you can provide it at that time.

• **Make frequent, actionable improvements.** Don’t wait for a big project or big finding to make analytics-based improvements in the business. Smaller, more frequent successes keep your projects top-of-mind and remind stakeholders of the ongoing value analytics delivers.

• **Show them the success in failure.** Not every hypothesis is proven true. But rewards come from disproving hypotheses, too. The business can move on to other challenges, rather than wasting time rehashing items irrelevant to the company’s longterm success.

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**Think multichannel.**

Contact center analytics now covers more than speech. And today’s customer satisfaction is about more than net promoter score (NPS).

Today’s tools can analyze what is said — not just during phone calls, but what’s communicated via emails, chats, social media and more. Sentiment, not merely words, can be analyzed. How your agents utilize the tools available to them during customer interactions can be revealed.

This holistic approach helps your business gain more accurate, data-driven insights to improve the customer experience and drive revenue with every customer interaction. Yet some businesses hesitate to embrace multichannel due to its perceived complexity. How does it work? How will they know which touchpoints cause repeat effort? How will they avoid channel churn?

The reward is well worth the extra effort, however. Your customers are less loyal than ever; you need to let them connect with you in multiple ways, across multiple channels, or you risk losing their business altogether. At the same time, only by connecting the dots between multiple channels will you understand their interdependencies and connectedness—knowledge needed to fully optimize your customers’ experience with you.

**It’s okay to “fish.”**

Some of the greatest discoveries in history were unintended. Outcomes from customer analytics are no different. Let analytics be your beacon, and you’ll likely discover something you didn’t know.
EXAMPLE

Case in point: a credit union discovered an issue with their ATM policy when searching for calls in which the customer asked to speak to a supervisor. As a result, they adjusted the policy and recouped over a billion dollars in lost revenue.

So keep an open mind when scrutinizing calls and other customer interactions. Synthesize the data, look at the puzzle pieces: try to understand the story. Don’t be afraid to see possibilities or follow hunches.

And when you hear something interesting on a call? Use analytics to determine the scope of the potential problem or opportunity before determining if a valid project exists.
2. PLAN AND PREPARE PROPERLY

Prepare for change.

Companies implement contact center analytics to drive improvement by analyzing the cornucopia of data available within customer interactions. Improvement requires change. But it’s human nature to resist change. And there’s widespread misunderstanding about what analytics means. So what do you do?

Any kind of change management is a company-wide endeavor. And it has to start from the very top. If executives aren’t comfortable with the change, you won’t have their support when attempting to implement it with their frontline workers.

Next, you need to ready the internal stakeholders who will provide input. Have they bought in? Do they understand what’s needed of them, and what the potential outcomes are? If they haven’t yet actively applied or used contact center analytics, you may have to educate them on what it is — and what it’s not.

Gather your team.

Like any project, who’s on the contact center analytics team largely influences whether it succeeds or fails. You have to plan for and fund both implementation and ongoing resources. You need to have the right people, with right skill sets, working on it. And this requires funding. It’s important your leadership team and stakeholders understand this requirement, and commit longterm to the project and its associated budget.

When it comes to legacy call center analytics, people are accustomed to conclusions based on hard data—not using data to understand how something came about. But today’s analytics do both. So first you need buy-in from the executive team that they’re ready and willing to accept this new type of information.

A mix of both formal and informal leadership needs to be on the analytics team in order to drive improvements. A good way to start building this mix is to zero in on the squeaky wheel—find the outspoken leader who’s been vocal about an issue contact center analytics can help resolve, and get them involved. Teach them about contact center analytics, use it to solve their problem, then leverage them as an internal cheerleader to promote your cause. Once you have this advocate on your bandwagon, you can seek out other leadership team members.

Those who work on the contact center analytics project day-to-day need to be your customer subject matter experts and advocates. They’ve demonstrated proclivity toward viewing things from the customer perspective. And they’ve proven they can easily translate and communicate the customer experience to other people in the organization. Most companies can quickly identify internal candidates for this role.

You also need analysts, coaches and cheerleaders. Frontline contact center agents and business analysts typically assume these roles. Their purpose is to understand the insights, drive relevant information to the people who need it, communicate that information well and build ongoing enthusiasm for the project. Analysts in particular require a special skillset. They need to tap into both their logical mind and their intuition to get to the root of the data, then deliver the resulting insights in digestible, actionable pieces. Analysts also need to maintain and tune the analytics processes, which are constantly evolving.

Finally, contact center analytics is not just a contact center tool—it can drive systematic improvement across the entire enterprise. So the analytics team should be cross-functional, featuring members who possess a strong understanding of every aspect of the business.
Get input.  
Just as the team needs to be cross-functional, so do the projects on which the team works. Since analytics can impact every corner of the organization, it’s important to encourage everyone in the company to have a voice in the ongoing process and to suggest possible analytics projects. In return, your analytics team needs to promote and maintain a true open door policy.

Frontline agents in particular often surface great suggestions; they do, after all, speak to your customers every day. In fact, it’s safe to say nothing is more valuable than your frontline when it comes to contact center analytics initiatives. So you need to give them a safe haven in which they can share ideas, insights and observations. They’re your most valuable resource when it comes to identifying initial, “low-hanging fruit” projects on which your analytics initiative can focus.

But open door policies and safe havens aren’t enough. Your analytics team needs to be receptive to the observations and suggestions they’re given. They need to put their own beliefs and egos aside, and listen objectively to the information they receive. Most importantly, they can’t be afraid to hear the answer to whatever question their analytics project might ask. A culture of continual learning and ongoing improvement will only occur if this type of neutral environment is fostered.

Set up the analytics team for success.  
A common assumption with analytics is that, once you set it up, it just operates by itself. Not true. Analytics needs to be nurtured and fostered. It’s a continuous cycle of issues and projects. As a result, those working on it day-to-day risk burnout or demoralization. They need continual encouragement and support. They need ongoing training and immersion in best practices. They also need empowerment.

How do you do this? Give your team the autonomy and safety to find their voice, to say, “this is what I’m seeing”—let them base insights off of observations, not ego or emotion. Let them apply their intuition, their gut instinct.

You want them to draw conclusions from hard data, but you also want them to communicate the intangibles: “this is what I see,” “these are the issues I’m identifying.”
Institute a formalized process.
Analytics projects are often waylaid by too many requests or too many distractions. To maintain focus, create a formalized, closed-loop process:

• Identify potential issues to investigate.
For the most impact, understand the issues from the customer perspective—not from the company perspective. A customer’s perception is their reality. So ask questions like, “What is a customer’s experience with us like? How easy is it for them to do business with us? What are their biggest frustrations with us? How can we improve the customer experience and reduce their effort?” And think like a kid—use “imagine if” scenarios; imagine if you could do this, imagine if you had this information. It’s about possibilities.

• Prioritize 2-3 issues. In the near-term, go for low-hanging fruit so you can demonstrate immediate value and show fast success. These are usually fairly easy, low-cost fixes such as moving a website link, removing outdated information from the website, and removing or enhancing a simple, existing process. Once you have a few of these smaller wins under your belt, start tackling the larger issues.

• Dig in, analyze data and create your hypothesis. Now it’s time to analyze the data. You’ll need to listen to a lot of calls and review many customer interactions. You might also want to expand your definition of “stakeholder”—consider including user groups, customer advisory councils, or even partners and vendors in your data substantiation process. Then create your hypothesis.

• Propose and implement a project plan. The most successful project plans are structured yet flexible, and managed from implementation through governance by a single person. A project plan needs to allow the analytics process to grow with customer demand and accurately estimate required future resources. It also needs to outline how analytics-driven insights—backed by actual call recordings or customer emails, chats, etc.—will be disseminated back to stakeholders across various departments and how those stakeholders will be educated on what to do with those insights.

• Continuously measure results. Throughout the project, measure and record results on an ongoing basis. Establish baselines—the state of the data prior to your analytics project—and measure your progress against them. As mentioned above, synthesize this information into a concise format and distribute it weekly to your stakeholders. In addition, consider how your analytics project can inform your existing metrics and KPIs and adjust accordingly.

It’s extremely tempting once you see the wealth of data made available by an analytics solution to immediately try to solve every problem you can think of. The reality is that change takes time and measuring the impact of that change takes even longer. Start slow. Stay focused on the most important and/or most immediately impactful projects, and close them out before moving on to something else.

Data analysis is both subjective and objective, leveraging tools such as speech analytics, text analytics and desktop analytics. For the most insight, you want to move beyond the hard numbers to also analyze nuances, emotions, unspoken inferences, tones, etc.
Align with company goals.

The ultimate goal of any contact center analytics project is to improve—directly or indirectly—customer satisfaction and customer retention. At the same time, executives are likely focused on growing revenues, increasing customer loyalty and decreasing customer churn. These goals are not mutually exclusive. So work with your executives to figure out the information they need from customers to meet their corporate objectives, then use analytics to deliver it. When choosing which projects to tackle, pick the ones that most strongly tie back to company goals.

Then, stay aligned with shifting corporate goals and strategies. They evolve based on market changes, so stay attuned to them. You want to seamlessly shift your contact center analytics as needed to continually support company growth.
Your customers are the heart of your business. And your executive team makes or breaks any project you undertake. Contact center analytics gives you a unique opportunity to bridge these two constituencies while meeting both their needs. A successful analytics initiative takes hard work, commitment and dedication, but the resulting business benefits are well worth it.