

1. "LIVE" MONTHLY INBOUND TELEPHONE CALLS TO CONTACT CENTER

Include	<ul style="list-style-type: none"> Incoming telephone calls handled by contact center FTE
Exclude	<ul style="list-style-type: none"> Incoming calls handled entirely by the voice response unit (VRU) Calls handled by a third party/outsourced coverage Outbound sales calls Loan origination calls if handled by separate loan group or queue

Answer: _____

Format: 0

2. MONTHLY INBOUND CALLS HANDLED BY VOICE RESPONSE UNIT (VRU) ENTIRELY WITHOUT "LIVE" CONTACT CENTER ASSISTANCE

Include	<ul style="list-style-type: none"> Incoming calls handled entirely by the voice response unit (VRU)
Exclude	<ul style="list-style-type: none"> Live calls handled by contact center FTE

Answer: _____

Format: 0

3. NUMBER OF MONTHLY OUTBOUND SALES CALLS BY TYPE

Instructions	<ul style="list-style-type: none"> Please provide number of outbound sales calls by type Please do not include service-related call backs to customers
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	# of Monthly Calls
Consumer loans	
New deposit account opening	
Other services, i.e. trust, investment, insurance	

4. NUMBER OF NEW DEPOSIT ACCOUNTS OPENED IN CONTACT CENTER EACH MONTH

Include	<ul style="list-style-type: none"> New account applications processed through the contact center
Exclude	<ul style="list-style-type: none"> Account openings referred to branches or other departments

Answer: _____

Format: 0

5. AVERAGE WAIT OR "ON HOLD" TIME IN CONTACT CENTER (IN MINUTES)

Include	<ul style="list-style-type: none"> Time a caller waits before an agent answers the call on a monthly average Please use system-defined wait time (typically measured from the time caller is placed in queue) Please convert seconds into fractions of minutes. Example, for 25 seconds, $25/60 = .42$
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Answer: _____

Format: 0.00

6. AVERAGE CALL "TALK TIME" (IN MINUTES)

Include	<ul style="list-style-type: none">• Average length of time when agent & caller are talking• Please convert seconds into fraction of minutes. Example, for 25 seconds, $25/60 = .42$
Exclude	<ul style="list-style-type: none">• Total "handle time", which typically includes wait time, etc.• Work out time after conversation is complete• Loan origination calls if handled by separate loan group or queue

Answer: _____

Format: 0.00

7. AVERAGE ABANDONED CALL RATE (AS A PERCENTAGE % OF ALL CALLS)

Include	<ul style="list-style-type: none">• Percentage of calls terminated by the caller prior to speaking with an agent but after being placed in the queue• Please use system-defined abandon rate
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Answer: _____

Format: 0.00%

8. HOW MANY EMAIL INQUIRIES ARE RECEIVED THROUGH THE CONTACT CENTER PER MONTH?

Include	<ul style="list-style-type: none">• Secure and/or unsecured messages handled by contact center FTE
Exclude	<ul style="list-style-type: none">• Live chat (See separate question)

Answer: _____

Format: 0

9. HOW MANY CHAT SESSIONS ARE CONDUCTED PER MONTH?

Include	<ul style="list-style-type: none">• Secure and/or unsecured live chat interactions/conversations handled by contact center FTE
Exclude	<ul style="list-style-type: none">• Non-chat messages/emails (See separate question)

Answer: _____

Format: 0

10. WHAT IS YOUR ANNUALIZED CONTACT CENTER AGENT TURNOVER RATE? (AS A PERCENTAGE OF TOTAL CONTACT CENTER AGENTS)

Instructions	<ul style="list-style-type: none">• Turnover is defined as voluntary and involuntary terminations as a percent of total contact center agent head count.
Exclude	<ul style="list-style-type: none">• Job eliminations or internal promotions/changes in job function

Answer: _____

Format: 0.00% Max 100

11. DO YOU OUTSOURCE ANY PORTION OF YOUR CONTACT CENTER COVERAGE?

- ☐ Yes ☐ No

12. PICK BEST DESCRIPTION FOR YOUR OUTSOURCING CONTACT CENTER COVERAGE

- ☐ Off hours
☐ Overflow
☐ Both
☐ Do Not Outsource

13. AVERAGE NUMBER OF MONTHLY CALLS HANDLED BY OUTSOURCED COVERAGE

Answer: _____
Format: 0

14. NAME OF CONTACT CENTER SOLUTION VENDOR

- ☐ Avaya
☐ Cisco
☐ Enghouse Interactive
☐ Genesys/Interactive Intelligence (or reseller such as Adapt)
☐ Mitel/ShoreTel
☐ NICE inContact
☐ Other

15. CONTACT CENTER MANAGEMENT FTE

Include	<ul style="list-style-type: none">• Supervising/managing contact center employees• Call review/coaching• Workforce management• Leading team meetings• Reviewing team reports
Exclude	<ul style="list-style-type: none">• Contact center agent function• Retail executive functions (See 'Retail Management FTE' [01])• Other contact center functions

Answer: _____

Format: 0.00

16. INBOUND CONTACT CENTER AGENTS FTE

Include	<ul style="list-style-type: none">• Answering retail service calls• Calls related to 'tier 1' internet banking, bill pay or mobile support/login issues/password resets/navigation help• Switchboard function
Exclude	<ul style="list-style-type: none">• Support fulfillment in the contact center• Loan origination activities• Outbound sales, email or chat functions• Centralized Teller FTE for Interactive Teller Machines (See 'Branch Sales and Services' [01])

Answer: _____

Format: 0.00

17. OUTBOUND CONTACT CENTER AGENTS FTE

Include	<ul style="list-style-type: none">• Outbound sales calls
Exclude	<ul style="list-style-type: none">• Answering retail service calls• Support/fulfillment function in the contact center• Inbound loan origination call activities• Email and/or chat support

Answer: _____

Format: 0.00

18. CONTACT CENTER LOAN ORIGINATION AGENTS FTE

Include	<ul style="list-style-type: none">• Fielding consumer loan applications• All time spent on taking loan-by-phone applications by generalist and/or specialized representative regardless of where employees report (e.g. contact center, centralized loan group, etc.)
Exclude	<ul style="list-style-type: none">• Answering retail service and other calls unrelated to loans

Answer: _____

Format: 0.00

19. CONTACT CENTER NEW ACCOUNT OPENING FTE

Include	<ul style="list-style-type: none">• Opening new deposit accounts
Exclude	<ul style="list-style-type: none">• Loan applications calls

Answer: _____

Format: 0.00

20. CONTACT CENTER SUPPORT/ FULFILLMENT FTE

Include	<ul style="list-style-type: none">Fulfilling after-call work, i.e., printing/mailling statements/check copies (may be a % of time for the same employees handling inbound calls)
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Answer: _____

Format: 0.00

21. CONTACT CENTER EMAIL SUPPORT FTE

Include	<ul style="list-style-type: none">Answering member email inquiries including emails related to internet banking, bill pay or mobile support/password resets (may be a % of time for the same employees handling inbound calls)
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Answer: _____

Format: 0.00

22. CONTACT CENTER CHAT SUPPORT FTE

Include	<ul style="list-style-type: none">Answering chat inquiriesInclude chat sessions related to internet banking, bill pay or mobile support/password resets
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Answer: _____

Format: 0.00

23. OTHER CONTACT CENTER FTE

Include	<ul style="list-style-type: none">Any other contact center function not listed
Exclude	<ul style="list-style-type: none">Contact center management or agent functionsContact center support/fulfillmentContact center chat and/or email support

Answer: _____

Format: 0.00

24. IF YOU HAVE FTE IN THE OTHER CONTACT CENTER FTE CATEGORY, PLEASE DESCRIBE FTE DUTIES

Answer: _____