

1. INBOUND CALLS PRESENTED TO CONTACT CENTER PER MONTH

<b>Include</b>	<ul style="list-style-type: none"> <li>Average of all inbound calls to contact center</li> <li>Service-related and calls related to loan and/or deposit origination</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Calls handled entirely by telephone banking/IVR</li> <li>Direct dials to other groups (e.g., operations, treasury management support)</li> </ul>

Answer: \_\_\_\_\_

Format: 0

2. MONTHLY LIVE, INBOUND CALLS HANDLED BY CONTACT CENTER

<b>Include</b>	<ul style="list-style-type: none"> <li>Incoming telephone calls handled by contact center FTE</li> <li>Service-related and calls related to loan and/or deposit origination</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Incoming calls handled entirely by the voice response unit (VRU)</li> <li>Calls handled by a third party/outsourced coverage</li> <li>Outbound sales calls</li> </ul>

Answer: \_\_\_\_\_

Format: 0

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

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

Answer: \_\_\_\_\_

Format: 0

4. INBOUND CALLS ABANDONED PER MONTH

<b>Include</b>	<ul style="list-style-type: none"> <li>Average of inbound calls abandoned by customer prior to call being handled</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Calls handled by agents in the contact center</li> <li>Calls handled by overflow/after-hours third party</li> <li>Calls terminated prior to completion of initial greeting (typically defined as between first 5 and 12 seconds)</li> </ul>

Answer: \_\_\_\_\_

Format: 0

5. AVERAGE SPEED OF ANSWER (ASA) IN CONTACT CENTER (IN MINUTES)

<b>Include</b>	<ul style="list-style-type: none"> <li>Total waiting time/total calls handled</li> <li>Convert seconds into fractions of minutes. Example, for 25 seconds, <math>25/60 = .42</math></li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Wait time associated with abandoned or missed calls</li> <li>Time spent on initial greeting/menu (system reports typically configured to exclude)</li> </ul>

Answer: \_\_\_\_\_

Format: 0.00

6. IS HOLD TIME DURING AN ACTIVE CALL TRACKED?

 Yes       No

7. AVERAGE ACTIVE CALL HOLD TIME

<b>Include</b>	<ul style="list-style-type: none"><li>• Average time agent is engaged in a call and places caller on hold</li><li>• Convert seconds into fractions of minutes. Example, for 25 seconds, <math>25/60 = .42</math></li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Talk and after call work time</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

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

<b>Include</b>	<ul style="list-style-type: none"><li>• Average talk time for calls handled in contact center</li><li>• Convert seconds into fraction of minutes. Example, for 25 seconds, <math>25/60 = .42</math></li></ul>
<b>Exclude</b>	<ul style="list-style-type: none"><li>• Hold and after call work time</li><li>• Loan origination calls if handled by separate loan group or queue</li></ul>

Answer: \_\_\_\_\_

Format: 0.00

9. IS AVERAGE HANDLE TIME (AHT) TRACKED?

 Yes       No

10. AVERAGE HANDLE TIME (AHT)

<b>Include</b>	<ul style="list-style-type: none"><li>• Total of average talk, hold, and after call work time/Total calls handled</li><li>• Convert seconds into fractions of minutes. Example, for 25 seconds, <math>25/60 = .42</math></li></ul>
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Answer: \_\_\_\_\_

Format: 0.00

11. IS AVERAGE AFTER CALL WORK TIME TRACKED?

 Yes       No

12. AVERAGE AFTER CALL WORK TIME

<b>Include</b>	<ul style="list-style-type: none"> <li>Average time agents spend in default after call status to complete disposition/wrap up codes or notes</li> <li>Systems typically configured to between 12 and 15 seconds of default after call work time</li> <li>Convert seconds into fractions of minutes. Example, for 25 seconds, <math>25/60 = .42</math></li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Talk and hold time</li> </ul>

Answer: \_\_\_\_\_  
Format: 0.00

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

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

Answer: \_\_\_\_\_  
Format: 0

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

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

Answer: \_\_\_\_\_  
Format: 0

15. HOW MANY CHAT SESSIONS ARE CONDUCTED PER MONTH?

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

Answer: \_\_\_\_\_  
Format: 0

16. NUMBER OF MONTHLY OUTBOUND SALES CALLS BY TYPE

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

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

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

Answer: \_\_\_\_\_

Format: 0.00% Max 100

18. CONTACT CENTER MANAGEMENT FTE

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

Answer: \_\_\_\_\_

Format: 0.00

19. INBOUND CONTACT CENTER AGENTS FTE

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

Answer: \_\_\_\_\_

Format: 0.00

20. OUTBOUND CONTACT CENTER AGENTS FTE

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

Answer: \_\_\_\_\_

Format: 0.00

21. CONTACT CENTER LOAN ORIGINATION AGENTS FTE

<b>Include</b>	<ul style="list-style-type: none"> <li>Fielding consumer loan applications</li> <li>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.)</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>Answering retail service and other calls unrelated to loans</li> </ul>

Answer: \_\_\_\_\_

Format: 0.00

22. CONTACT CENTER NEW ACCOUNT OPENING FTE

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

Answer: \_\_\_\_\_

Format: 0.00

23. CONTACT CENTER SUPPORT/ FULFILLMENT FTE

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

Format: 0.00

24. CONTACT CENTER EMAIL SUPPORT FTE

<b>Include</b>	<ul style="list-style-type: none"> <li>Answering customer 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)</li> </ul>
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Answer: \_\_\_\_\_

Format: 0.00

25. CONTACT CENTER CHAT SUPPORT FTE

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

Format: 0.00

26. OTHER CONTACT CENTER FTE

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

Answer: \_\_\_\_\_  
Format: 0.00

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

Answer: \_\_\_\_\_

28. CENTRALIZED TELLER FTE FOR INTERACTIVE TELLER MACHINES (IF APPLICABLE)

<b>Include</b>	<ul style="list-style-type: none"> <li>Conducting transactions with customers through Interactive Teller Machine (ITM)</li> </ul>
<b>Exclude</b>	<ul style="list-style-type: none"> <li>'In-person' Tellers (See 'Tellers, Float Tellers FTE' [01])</li> <li>Debit support functions (See 'Debit Support FTE' [04])</li> <li>ATM loading (See 'Branch-Other function' [01])</li> <li>Terminal and circuit monitoring (See 'ATM/ITM Support FTE' [04])</li> </ul>

Answer: \_\_\_\_\_  
Format: 0.00 Min 0

29. MONTHLY INBOUND DEPOSIT ACCOUNT OPENING CALLS

<b>Include</b>	<ul style="list-style-type: none"> <li>Inbound deposit opening calls handled by contact center FTE</li> </ul>
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Answer: \_\_\_\_\_  
Format: 0

30. MONTHLY INBOUND LOAN ORIGINATION CALLS

<b>Include</b>	<ul style="list-style-type: none"> <li>Loan origination calls handled by contact center FTE</li> </ul>
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Answer: \_\_\_\_\_  
Format: 0