

1. INBOUND CALLS PRESENTED TO CONTACT CENTER PER MONTH

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

Answer: _____

Format: 0

2. MONTHLY LIVE, INBOUND CALLS HANDLED BY CONTACT CENTER FTE

Include	<ul style="list-style-type: none">• Incoming telephone calls handled by contact center FTE• Service-related and calls related to loan and/or deposit origination
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

Answer: _____

Format: 0

3. MONTHLY INBOUND DEPOSIT ACCOUNT OPENING CALLS

Include	<ul style="list-style-type: none">• Inbound deposit opening calls handled by contact center FTE
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Answer: _____

Format: 0

4. MONTHLY INBOUND LOAN ORIGINATION CALLS

Include	<ul style="list-style-type: none">• Loan origination calls handled by contact center FTE
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Answer: _____

Format: 0

5. 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

6. INBOUND CALLS ABANDONED PER MONTH

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

Answer: _____

Format: 0

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

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

Answer: _____

Format: 0.00

8. IS HOLD TIME DURING AN ACTIVE CALL TRACKED?

☐ Yes ☐ No

9. AVERAGE ACTIVE CALL HOLD TIME

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

Answer: _____

Format: 0.00

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

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

Answer: _____

Format: 0.00

11. IS AVERAGE HANDLE TIME (AHT) TRACKED?

☐ Yes ☐ No

12. AVERAGE HANDLE TIME (AHT)

Include

- Total of average talk, hold, and after call work time/Total calls handled
- Convert seconds into fractions of minutes. Example, for 25 seconds, $25/60 = .42$

Answer: _____

Format: 0.00

13. IS AVERAGE AFTER CALL WORK TIME TRACKED?

☐ Yes ☐ No

14. AVERAGE AFTER CALL WORK TIME

Include

- Average time agents spend in default after call status to complete disposition/wrap up codes or notes
- Systems typically configured to between 12 and 15 seconds of default after call work time
- Convert seconds into fractions of minutes. Example, for 25 seconds, $25/60 = .42$

Exclude

- Talk and hold time

Answer: _____

Format: 0.00

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

Include

- New account applications processed through the contact center

Exclude

- Account openings referred to branches or other departments

Answer: _____

Format: 0

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

Include

- Secure and/or unsecured messages handled by contact center FTE

Exclude

- Live chat (See separate question)

Answer: _____

Format: 0

17. HOW MANY CHAT SESSIONS ARE CONDUCTED PER MONTH?

Include

- Secure and/or unsecured live chat interactions/conversations handled by contact center FTE

Exclude

- Non-chat messages/emails (See separate question)

Answer: _____

Format: 0

18. NUMBER OF MONTHLY OUTBOUND SALES CALLS BY TYPE

Instructions

- Please provide number of outbound sales calls by type
- Please do not include service-related call backs to customers

	# of Monthly Calls
Consumer loans	
New deposit account opening	
Other services, i.e. trust, investment, insurance	

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

Instructions

- Turnover is defined as voluntary and involuntary terminations as a percent of total contact center agent head count.

Exclude

- Job eliminations or internal promotions/changes in job function

Answer: _____

Format: 0.00% Max 100

20. CONTACT CENTER MANAGEMENT FTE

Include

- Supervising/managing contact center employees
- Call review/coaching
- Workforce management
- Leading team meetings
- Reviewing team reports

Exclude

- Contact center agent function
- Retail executive functions (See 'Retail Management FTE' [01])
- Other contact center functions

Answer: _____

Format: 0.00

21. INBOUND CONTACT CENTER AGENTS FTE

Include

- 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

- 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

22. 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

23. 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

24. 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

25. 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

26. CONTACT CENTER EMAIL SUPPORT FTE

Include	<ul style="list-style-type: none">• 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)
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Answer: _____

Format: 0.00

27. CONTACT CENTER CHAT SUPPORT FTE

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

Format: 0.00

28. 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 functions• Contact center support/fulfillment• Contact center chat and/or email support

Answer: _____

Format: 0.00

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

Answer: _____

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

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

Answer: _____

Format: 0.00 Min 0

31. AVERAGE CONTACT CENTER RESOURCE COST

Include	<ul style="list-style-type: none">• Total salaries and benefits per FTE (including contact center managers, inbound/outbound / loan agents, new account opening, support / fulfillment, email, chat, and other FTE)
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Answer: _____

Format: \$0