

Performance Dashboards 101

January 2017



Ben Vesta, Vice President of
Support & Development



Performance Dashboards 101



Would you drive a car that's missing its speedometer or fuel gauge? What if these crucial dashboard elements were replaced with an altimeter? Would that ease your concerns?

It isn't surprising that most people would answer "no" to these questions. We know that a reliable, all-encompassing dashboard is essential to operating your vehicle. Without it, you can't operate safely or lawfully.

Liken this to a contact center trying to monitor performance and run operations based on incomplete or invalid dashboards. This happens all too often, which is a shame because we all know that there is no shortage of data in the business world. In fact, much of the 2.5 quintillion bytes of data generated every day is created by consumers across their customer journeys and is stored by businesses; however, most companies only use a fraction of the data available to them.

We ask, what's the use of all of this customer data if you don't leverage the insights within?

Many companies want to leverage their data but admit that it's a challenge to figure out how to put it all to use. In the contact center, real time and historical dashboards need to display vast customer data in a way that is easy to consume. Administrators use contact center dashboards to drive business decisions, monitor operations, react to change, predict performance and set goals so it is crucial that they are designed to display only relevant data. In truth, getting this design just right is an ongoing challenge that many enterprises struggle with on a daily basis.

“Augmenting [voice data] with customer data from sales, marketing and other channels, like chat, email, web and social media, can help paint a bigger, more complete picture of your entire customer journey.”

Understand your key performance indicators (KPIs).

The question is, what data should you display on your dashboards? To answer this, you need to consider what drives your contact center. Is it a profit center, where the goal is to generate leads, sales, or other revenue activity? Is it a cost center, primarily geared towards customer service or support activities? Perhaps it is a combination of the two, or the focus is to generate loyalty in your customer base, indirectly supporting revenue. Whatever the case may be, you need to focus on customer service metrics that truly indicate whether you're meeting (or missing) your goals.

Here are a few KPIs that are helpful for measuring the effectiveness of the different types of contact centers.

Profit centers should focus on answering calls quickly, being mindful of average speed of answer (ASA), and abandon rate. An abandoned call is a lost sales opportunity so there should always be a number of available agents that can absorb a sudden influx of calls. This metric should be watched for overall cost considerations and should only be viewed as a bad thing if numbers remain stagnant at a high level.

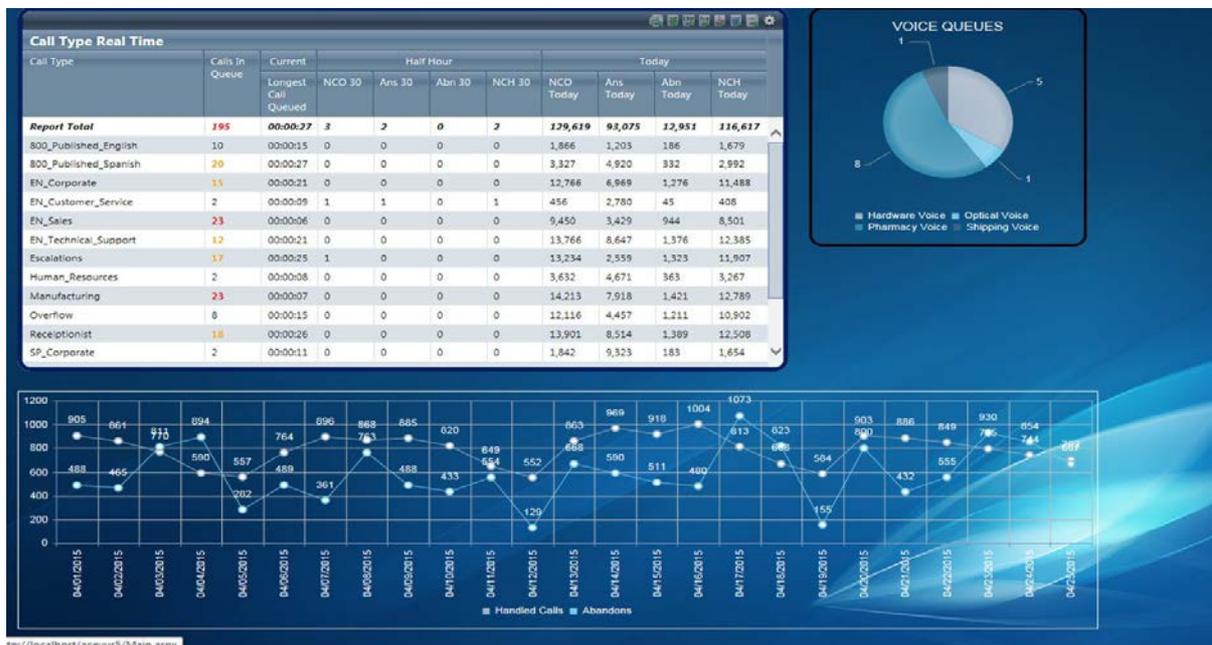
There should be minimal focus on average handle time (AHT) except where it relates to sales figures. At the agent level, agents that spend too long on calls and consistently miss sales goals should be coached on better sales techniques and interpersonal skills. However, agents who consistently drive revenue should not be admonished for spending more time with callers.

Cost centers typically focus on service levels and occupancy rates. Service levels indicate how many callers wait in queue for an acceptable amount of time. Generally, callers expect to wait in queue for a short period of time and are happiest if that time is shorter than 60 seconds. Occupancy rate is the reverse



side of the same coin, indicating how busy the agents are. If they go from one customer to the next without breaks between calls the entire shift, agent burnout can be a concern. The ideal balance is to have relatively high service levels with reasonably high occupancy. AHT is also considered an important factor in cost centers since there is no time for extra conversation during the business transaction.

Repeat calls and transfers that cost agent time and company money are among the most undesirable behaviors in cost centers. Customer service metrics like first-contact resolution (FCR) and transfer rate help contact centers monitor these activities.



Customer advocacy centers are a relatively new concept. They are a branch that exists for the benefit of the customer, and generally reflect a blend of cost and profit centers. These centers care about service levels above all else, and while they may check AHT, they do not treat the metric as a KPI.

The agents are trained to answer a wide variety of calls, which means that call volume tends to overflow amongst agent teams as they work to ensure the highest level of service. Number of calls waiting, longest call waiting, and service levels are all important metrics, but the most critical are the post-call survey scores and positive or negative “buzz” about the company. A company’s Net Promoter Score (NPS) – how likely a person would be to recommend them to others – is a key metric that many organizations are now tracking.

Customer advocacy centers typically have a social media department that engages with customers in a wider variety of channels. Monitoring social feeds for feedback on customer experiences helps drive brand loyalty.

Get the data.

Now that you know some critical KPIs, you need to pull in the necessary information. The most obvious is phone data that shows number of calls in queue, longest calls waiting, service levels and so forth. Augmenting this with customer data from sales, marketing and other channels like chat, email, web and social media can help paint a bigger, more complete picture of your entire customer journey. Start by listing the various systems in your enterprise and begin inquiring about data availability from the team(s) that manage them. Which data points can you utilize?

Combine the data.

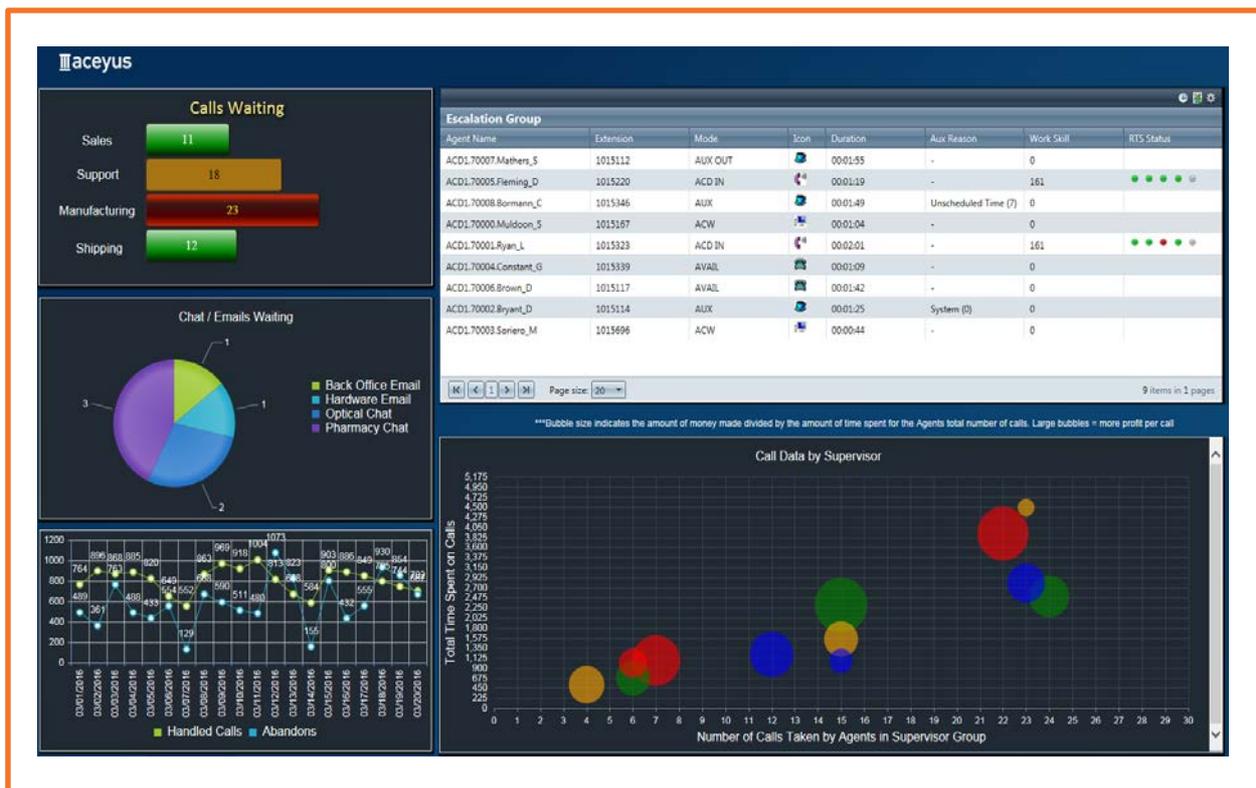
Some of the data is useful by itself. For example, the weather at various locations throughout the country might impact whether or not employees can get to work. Other information, such as sales numbers or survey scores, can be integrated directly with agent information, providing a combined view to supervisors that indicates how phone performance is related to actual business performance. *Are my agents who spend more time with customers selling more*

product? Are my agents that are meeting AHT goals getting lower quality scores on customer surveys? If so, maybe they are cutting calls short in order to meet an unrealistic goal.

Customer activity in one channel can have tangential impact on additional channels, even if no direct correlation can be made. If you know that your marketing department has launched a new email campaign, this could at least *explain* why you are suddenly inundated with 100% more call volume than your typical Tuesday morning generates.

Decide what is actionable.

In order for a contact center dashboard to be truly effective, it should include data points that are actionable. Customer service metrics like number of calls waiting and longest call in queue give you a general idea of how the contact center is performing, but there's not much you can do about calls once they are already in queue. You need to find metrics you can monitor in near real time that will help you understand why these calls are in queue in the first place, and if any of your self-service touchpoints have failed.



Revisiting our IVR exit rate scenario, we may be happy with an 80% IVR exit rate, but if the system is detecting a >25% increase in a particular exit code, that icon could still turn yellow or indicate in some other way that the metric warrants investigation. A simple click can identify an issue and resolve it in record time – helping to save your organization money, improve customer satisfaction, and increase your NPS.

Maintain.

Once your contact center dashboards are up and running, it's critical that you review them frequently and keep them updated. Make sure you have resources assigned to incorporate new data sources, thresholds, and other changes based on feedback from the users. If some metrics become a lower priority, move them to a sub-dashboard where you can still get to them, but they don't take up valuable real estate on the main screen. Likewise, as your business goals change, you can promote other metrics to the top screen. To keep the screens interesting and fresh, consider design updates at least every 18 months (more frequently, if possible) to keep pace with web design trends, and company branding changes.

[Assign] resources to incorporate new data sources, thresholds, and other changes based on feedback from the users... As your business goals change, you can promote other metrics to the top screen.



Ben Vesta

Vice President of Support and Development at Aceyus

Ben joined Aceyus in 2006, adding a software component to its successful consulting practice. His vast experience solving contact center reporting and business challenges has helped him lead Aceyus' development, deployment and support initiatives.

He leads the Aceyus Support & Development Lab in Aurora, IL where his team continues to create user-friendly tools that put businesses on the fast track to the data they need.