FAB Solutions: Contact Centre Hand Book

Helping Contact Centres
DO Better and BE Better

Who are FAB Solutions?

Fab Solutions are a Contact Centre Consultancy, we help you enhance your customer experience be looking at 4 key support pillars for your business across People, process, Leadership and technology.

People	Process	Technology	Leadership

Why have we created this hand-book? 01

We created this hand-book to help Contact Centre professionals evaluate their operation using the Contact Centre health check and then take action on areas that could be improved using the Operational efficiency score to give you a rating of how effective your operation is currently – you can then drill down into specific areas and ask yourself key questions on how you can improve.

How to use this document? 02

This document is a guide to help you consider how you could improve some of the key performance areas of your Contact Centre. It should be sued in tandem with the Contact Centre health check so you can zone in on the areas that are causing you the greatest challenge. There are useful points and food for thought in some of the other areas too so have a look and rate your Contact Centres performance and check if you are acting in some of the other areas.

Operational efficiency score 03

If you completed the Contact Centre health check you will now have your operational effectiveness score, this is an indicative measure of your Contact Centres performance across 10 key customer, process, and people metrics, the higher your score the more effective your Contact Centre is likely to be in its operational rigour and building great customer Experience.

There are lots of areas you can monitor in your Contact Centre so if you feel like you have scored well but the reality does not feel that way then there are other areas that can affect your Contact Centre so feel free to book in a free no obligations 121 conversation to see how we can help, details of how to do that can be found at the end of this document.

Green	**16-20**	You are performing well; you are within tolerance of most of the key metrics within the Health check.
Amber	**6-15**	You are on the maximum Tolerance on all metrics within the Health Check with little room for movement causing potential for customer risk
Red	**6 or below**	You have indicated several areas that require improvement to deliver great customer outcomes. There is a high risk of delivering a poor customer experience

Metric List

1. Percentage of complaints
2. Abandon Rate
3. Net Promoter Score (NPS)
4. Quality Assurance
5. Attrition
6. Grade Of Service
7. Shrinkage
8. Occupancy
9. Sickness Absence
10. Employee Engagement

Click on the Headers to go directly to the section that is of most relevance to your Contact Centre

FAB SOLUTIONS

Percentage of complaints | Metric

Importance of this metric

The volume of complaints in your business against the amount of calls is symbolic of how effective your processes are - too many complaints suggest some key flaws in your process and high levels of customer dissatisfaction which will impact brand and reputation and pose as conducts risks and potentials and reputational damage

Key questions to ask/Areas to investigate

1 Where are your complaints happening E.g., POS; Renewal; Claims; Servicing - finding the key area can help with root cause analysis and helps you tackle each area at a time to make incremental improvements.

2 What trends are they E.g. Process, People, Timings, Delays, Documentation, Failure in process? - Finding the key transaction points will allow you to walk through the process and really question how effective it is.

3 What percentage Complaints are upheld and rejected? - If a high volume is upheld this suggests more fundamental process flaws, if a high volume is rejected then communication or process isn't clear, or the agent behaviours aren't quite right e.g., they are rejecting incorrectly.

4 How competent are your team handling complaints what training exists - How transparent is your complaints process, how easy to understand and how do you measure competence and train this out in induction and ongoing refreshers? What E-learns exist to test competence and understanding?

FAB SOLUTIONS

Percentage of complaints

Metric

5 How many complaints are escalated by managers - Understanding volumes here establishes the competence and confidence of your agent's complaint handling abilities. How often do you audit the competence of your Team Leaders handling complaints?

6 What volume of Compensation payments are made - Do you track this? How much discretion do your agents have and how is this monitored and is it consistently applied and consistently applied and consistent with the level of detriment?

7 How many complaints are at each stage of the Complaints cycle - why do they take so long to resolve? Understanding your average time to resolve and First Call resolutions metrics will help reduce reportable complaints but also help reduce inbound traffic and productive time.

8 What is the Type and Frequency of complaints made? - Using these insights, you can direct your attention to some of the big areas that might help significantly improve customer experience but also release productive time though reducing each complaint type.

Abandon Rate

02 **Metric**

Importance of this metric

High abandon rates can impact commercial performance and reputationally cause you harm, there is also a regulatory risk in business that you create post sale barriers for customers to claim, or renew policies and or cancel within a timely manner

Key questions to ask/Areas to investigate

At what interval during the day do you generally lose your calls - breaking abandoned calls down by Interval will give you a clear view of demand and scheduling conflicts and where your pinch points are for staffing up etc.

How are your shifts aligned to your call demand - could you be smarter with planning your shifts around your peak times, could split shifts or slight changes in rotations help with the demand?

How do you forecast call volumes and demand into the Contact Centre - an accurate forecast of demand is crucial; how does this line up with external communications that might drive increase in forecast and how closely do you monitor accuracy of your forecast? This should ideally be within 5% of what's planned.

How do you manage real time adherence and conformance and what reporting exists - a lot of calls are abandoned due to agent behaviours and a lack of awareness of breaks, lunches, and scheduled activity you should be aiming for 90-95% conformance or adherence to schedule?

Abandon Rate

02 Metric

Are your shrinkage levels in line with your resourcing plan - monitoring lost time per interval and reviewing this against what you had planned will help inform adherence and actual requirement and lost time in the day. Don't underestimate how much shrinkage you need based on your team's ability you may need more at different times

What percentage of customers are abandoning in the IVR - If customers are abandoning before they even speak to you then you can't help them- how long is your IVR? how easy are you making it for customers to speak to an agent - do you know how many customers disappear in the IVR selection and do you allow customers to Self serve using IVR technology?

How many abandoned customers are repeat callers - You should be able to gather intelligence from your call reporting on repeat callers and prioritse outbound call backs to minimise a repeat cycle.

How does your IVR direct customers to the right areas - How clear is your IVR, how many internal transfers are you seeing because of an ineffective routing or selection process, too many levels of IVR frustrate customers and they end up pressing 1 all the time.

What is your average speed of answer (ASA) versus your abandon rate? LOW ASA and High Abandon rate is a sign of poor IVR messaging

Net Promoter Score (NPS) 03 Metric

Importance of this metric

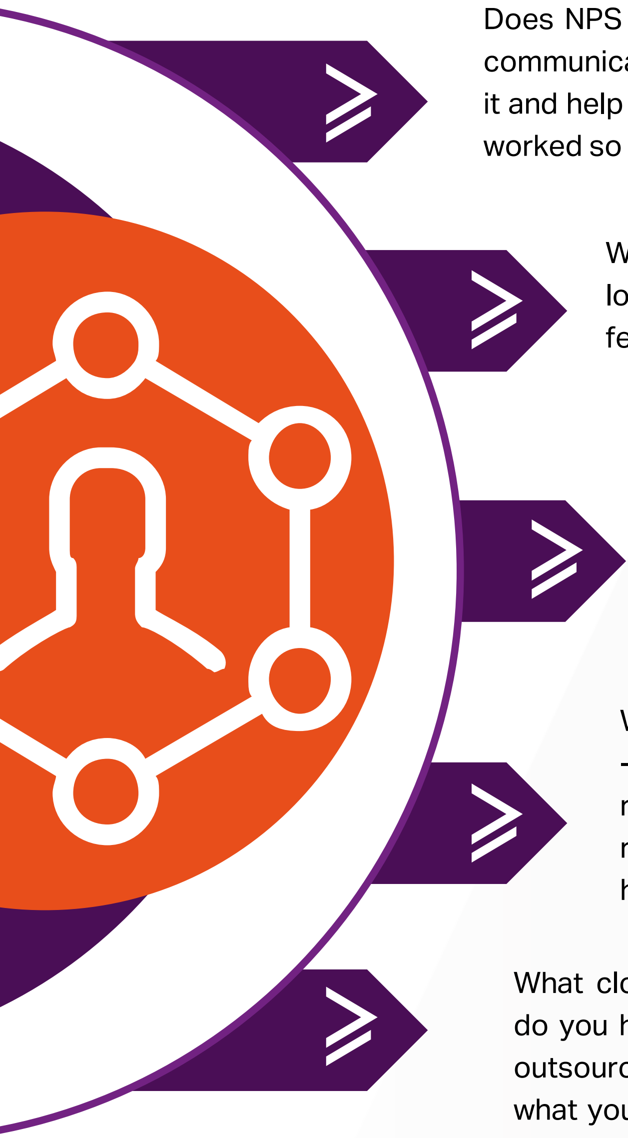
This is a good indicator of your customer experience and how much existing and new customers are an advocate of your brand and your products and services.
A negative score can have reputational impacts but also suggests there is a deeper issue with how you service your customers enquiries

Key questions to ask/Areas to investigate

- At what points in the process are you asking? - Transactional NPS can give you a snapshot in the process you are looking to test whereas relationship NPS usually at the end can give you a fuller picture of NPS.
- What is the split of Passive versus promoters - often passive could be easily moved to promoters by explaining to your customers what passive means?
- How clearly do you explain NPS in your customer survey or your post call automated message - is this clear for your customers and are your people aware you ask for it – can they help with positioning?
- Does your NPS differ at different points in the journey? - Using transactional NPS you can find out satisfaction levels at certain parts of your process and probe into what happened and close the loop
- Do your Teams understand NPS - How do you train teams to talk about NPS surveys and the importance of these to your customers? Are your team aware of when you ask customers for feedback? Can they cherry pick who they offer this to?

Net Promoter Score (NPS) — Metric

Key questions to ask/Areas to investigate



Does NPS Feedback reach your frontline teams - How much you communicate about NPS can influence the advisor's connection to it and help celebrate positives and coach on elements that haven't worked so well.

What do you do with your NPS feedback to close the loop? Detractors should be followed up with close loop feedback, how do you do this service recovery?

What service recovery is done on Poor NPS feedback and how is NPS then re-tested - A good Service recovery plan and retest of NPS to check you have put right what was wrong can hugely improve customer advocacy.

What volumes of customers respond to your Surveys? - Small volumes don't give you proportional representation of your overall NPS rating and can skew results significantly a sample size of 100 or more will help give your more representative results.

What close loop feedback mechanisms or service recovery do you have? - This can be completed internally, or you can outsource and gather intelligence with reporting tools but what you do and how you train this out and what parameters and controls you use are the main elements to consider.

Importance of this metric

A high level of rework in these areas causes greater productivity challenges but also creates a risk further in the customer journey and reputational damage - in regulated industries this is also a measure of conduct risk and how clear the communication and advice you are giving on the sale, service and renewal of your products

- What percentage of calls are monitored? Typically, only 1-3% of calls are monitored which can be low volume to identify trends.

- Do you use Speech Analytics to capture a broader sample of calls to give a more representative sample of your QA performance? A good Speech Strategy can cover 100% of calls and allow more targeted calls by your QA team

- How complex are your scripts? Do they need to be scripts could they be guides or prompts, do you have too many verbatim areas which drive more scripted language and increase margins for error, how do you highlight the key discussion points, so agents understand their importance?

- How systemised are you scripts to your process and how logically do they flow in line with your process to stop teams jumping around? Moving across multiple Screens and systems will drive increased opportunities for failure – how much do you teams have to juggle?

- How rigid is your QA Framework – is it pass, or fail are you searching for outcomes or adherence to process? Having a human approach to the customer outcome is important as well as ensuring the correct process is followed. How much discretion do you allow your QA assessors to exercise?

Quality Assurance 04 Metric

How quickly is your Call feedback delivered to frontline agents/Managers if this isn't feedback within 24 hours how much more opportunity for mistakes is there?

Where Is QA feedback documented for agents and is this visible to audit to ensure the feedback has been given and given in the right way?

Can you report on QA outcomes at each major touchpoint this will create a heatmap of potential problem areas at a macro level which might be fixed with training?

What does your QA heatmap look like when it comes to Poor customer outcomes? Your QA dashboard may be reporting errors but which of these has led to a poor outcome? This can help identify feedback for process improvement.

What does QA remediation process look like – how do you know the customer issue has been fixed and that the agent has had feedback and that historic issues have been put right?

Quality Assurance

04 Metric

How integral is QA in the reward scheme for your agents either as 121/appraisal and incentive/Reward schemes – accelerators and kickers can drive poor behaviours which impact QA

What does your Performance Management framework look like for QA? How many instances can an agent “get it wrong” before formal action takes place and how does this tie in with competency and increased coaching and supervision?

How many people are achieving the QA benchmarks and what does the Swing of performance look like? A low volume of those achieving suggest systemic issues in training or poorly calibrated QA outcomes.

How is competence measured for probation/Experienced agents – Staggering learning and more complex scenarios based on tenure can help. Use of graduation bays or “model office” environments helps speed up the learning curve.

What volume of coaching is focused on QA – this can be a symptom of underperformance and reflects on the leadership. Coaching is one of the single biggest areas of importance for performance improvement – how do you assign resource based on the level of performance and can you buddy up skill levels

Attrition

05 Metric

Importance of this metric

If this is high, then you need to revisit your recruitment and your onboarding process as well as understanding from an HR perspective reasons cited for leaving in the exit interview stages - high attrition impacts on speed to competency and effectiveness of agents as well as recruitment and training costs on average it cost £11k to replace an employee

Key questions to ask/Areas to investigate

Do employees complete exit surveys before they leave,, and how often is this analysed and fed back to your operation to act upon – are there common themes with departments and or specific teams?

What are the recruitment criteria - do you clearly articulate the type of person you are looking for to join your teams and how aware are your recruitment partners of this, are they clear to the candidates of the job role?

What is the tenure of those leaving - are people leaving early in probation or within 121 months and why - this is a significant cost if not understood – Map out your leavers and tenure is there a correlation that can be linked back to training or onboarding?

What does the training program look like - how is competence defined - how do you support the teams post training and who certifies and signs them off from training teams - do they have handovers with the operational managers?

What does ongoing competence look like - How is development supported outside of training and how often should someone get a 121, coaching sessions and how is this audited for the quality of conversation and quality of documentation (T&C evidence)

Attrition

05 **Metric**

What is the split of your people leavers by resignation/Dismissal/probationary terminations - high spikes here suggest training gaps or cultural issues that aren't being managed?

What percentage of people leave pending Disciplinary or performance concerns - high volumes of people being performance managed suggests gaps in training and coaching and potentially performance management used in place of coaching?

How do you measure culture in your business - surveying people about your culture and your values helps understand how your employees perceive the culture which could be impacting attrition as people don't feel valued or appreciated

Do your team survey their manager - asking for feedback specifically about management, trust and leadership capability can surface any potential risks early and help provide support to struggling team leaders.

What percentage of leavers are internal transfers - do you have a process of communicating and planning these moves e.g. caps/timelines extended notice periods etc. Why are they leaving your department is it progression or because of the department culture or job role complexity?

Grade Of Service

06

Metric

Importance of this metric

Grade of service is directly linked to your abandon rates if this is low it impacts your service delivery and makes it harder for new and existing clients to do business with you which can drive, cancellations and loss of business as well as post sale barriers for customers which is a regulatory focus

Key questions to ask areas to investigate

01

At what interval during the day is GOS generally lost - reviewing your demand on an intra-day basis will help give your insights on the root cause, e.g., Conformance, AHT, Call demand against forecast.

02

How are your shifts aligned to your call demand - Do you use a scheduling tool this will help align demand to shifts but reviewing demand on a regular basis and if its value adding or failure due to poor process which may help eliminate some unnecessary demand.

03

What is your Average speed of answer (ASA) if this is high it can mean high wait times for customers, they are not abandoning, which is good, but they are waiting for long periods which drives complaints.

If you have a high wait time volume - consider how you use your IVR to signpost people to websites or call backs in quieter periods, even better consider what you can offer as self-serve options or non-telephony channels.

Grade Of Service

06

Metric

04

How do you forecast call volumes and demand into the Contact Centre is this accurate and within 5% - Reviewing your forecast against actuals can help challenge forecast accuracy and uncover root cause of the forecast versus reality this should be done at least once per week.

05

How do you manage real time adherence and conformance and what reporting exists - often Grade of service will be lost due to lack of available resource how you schedule and allow your teams to adhere to this can help optimise the GOS on the day?

06

Are your shrinkage levels in line with the resource your need to run a smooth operation? You may have a shrinkage plan but is this realistic for the team you have and the call volumes you are seeing? Changing your shrinkage requirement when your demand changes or your available resource changes may be needed to deliver a better GOS - How aware are you of the actual shrinkage needed for your demand and do you plan off the phone activity in for all key activities.

07

How many customers are repeat callers - often poor GOS will mean higher abandoned calls and this results in call backs so tracking repeat customers may allow you to do targeted outbound activity to stop these from calling in, considering your high risk customers and proactively calling them can also reduce demand inbound.

08

What is your internal Transfer rates - high internal transfers suggests routing problems in your IVR? Where are you transferring to or where have they been transferred from – doing this analysis can help you understand if resource is allocated to the correct department or help you route to the right place first time.

Grade Of Service 06 Metric

09 What is your AHT and how does this compare to your forecasted AHT for your capacity plans - Your overall AHT may be masked by individuals' highs and lows so looking at these in more granular details by area and role type will help you establish areas to improve and reduce AHT.

10 How many weeks do you look at trends for GOS and Call demand do you future forecast your demand and seasonality - typically this should be looked at on a rolling 6 weeks and include looking at your historic shrinkage and any key events that might change the future forecast e.g., bank holidays, summer seasons, new induction intakes and staff efficiency etc.

11 What does your IVR do to direct customers to the right areas - reviewing the number of options and levels in your IVR may help reduce demand and impact on your shrinkage requirement, can you handle basic transactions within your IVR using self serve options and intuitive IVR technology?.

12 What is your break down of AHT - Wrap, Talk, hold - what are your budgets/expectations for each - breaking this down can help reduce the amount of shrinkage lost to calls by reviewing productive time and hold times etc? This can also weed out some poor behaviours that are masking productivity levels.

13 Internal Hold time - what percentage of time is this and how/what is the expectation for internal teams - this is usually impacted by other areas so understand in detail about who your hand offs are too and how their demands impact your demand.

Shrinkage

07 Metric

Importance of this metric

This has a direct impact on your ability to service your customers and run an efficient operation and too high shrinkage means you are having to work harder to cover the demand, to low might mean that you aren't giving your agents enough time off the phone and investing in them and could hide other underlying productivity issues also.

Key questions to ask areas to investigate

How do your Plan for your shrinkage - what does it include and what is the reality - often "unplanned" shrinkage is a sign of poor planning from team managers or lack of clarity on what shrinkage is needed.

What structure exists for your teams to link to real time teams - often having regular weekly planning meetings with feedback between teams can really help reduce unnecessary shrinkage.

Does your shrinkage differ by day to meet demand - Flatlining the shrinkage to the same each day doesn't take into account demand and lulls in the Contact Centre and or seasonality for holidays etc

What are the major elements of Shrinkage that make up your total time - understanding big ticket items like, Holidays, 121's team meetings, Coaching will then help you understand how much shrinkage is needed and how you can plan around peaks and troughs to balance total shrinkage?

How do your Real time team communicate adherence to team leaders - how do your teams communicate persistent non adherence and what action is taken, often a source of tension if not tackled.

What budget have you allocated to Shrinkage and how has this performed against budget historically - are you setting yourself up for failure and how often do you review based on changing demands, attrition, experience levels, QA performance etc

Occupancy 08 Metric

Importance of this metric

How much are you sweating your assets if this is too high it could lead to agent burn out and sickness which then impacts overall shrinkage and creates a poor culture in your workplace

Key questions to ask areas to investigate

If too High

- Are your teams adhering to schedule e.g., taking scheduled breaks, finishing on time, is there an expectation that they feel they can't take breaks?
- Do you have enough resource available to handle demand what is your GOS – do your team feel pressured to cut breaks short or don't get opportunity through high demand and therefore feel pressured to take another call?
- Are your abandon rates in line with KPI tolerance? High Abandon rate might mean that your teams aren't taking breaks and feel pressured due to call demand to stay signed on and therefore impacts occupancy.
- Are your wrap and hold times masking problems? High occupancy can be driven from overuse of Wrap and idle codes so what is the breakdown of each of these areas and can you be more explicit with your idle code usage drill down on activity that is value adding and not.
- Do your teams log in and out for breaks? If they stay logged in this can skew your occupancy data so ensure they log out or use an idle code to differentiate in your reporting.

Occupancy 08 Metric

If too Low

- Are you over resourced at the wrong times - shift alignment and call arrival patterns and intra-day reporting will help shine a light here it may be that you find your schedule could be changed to more evenly distribute resource across the day?

- Could you redirect resource to more value adding activity such as doing more proactive outbound activity. Multi skilling your teams to do other proactive activities can be a great way of showing your customers additional value e.g., Welcome calls to iron out any onboarding problems or retention calls to retain more customers

- Can you direct to other resources e.g., Webchat/email/admin etc are there bottle necks where upskilling people might help reduce demand and contingency resources?

- Are you tracking workload via WFM or a ticketing system like a CRM or Zendesk – how are your SLA's here, could they be better through more blended skills sets? Are their other areas of the business which are struggling that you could redirect resource to temporarily?

- Do you use dialler technology when doing outbound activity – could your setting be different move to more progressive or predictive dialling strategies to use time more effectively and optimise contact rates?

Sickness Absence

09 Metric

Importance of this metric

High sickness rates build into your shrinkage and are symbolic of poor Culture, poor leadership and poor employee engagement. It can be linked to high occupancy where holidays are refused or people don't feel they can take time off so use sickness as an excuse

Key questions to ask areas to investigate

01

Have you established root cause of absences? Musculoskeletal, Mental health, anxiety and stress are common in Contact Centres and can vary by team but are there trends in an area or team that might help identify common problems roles or managers.

02

Do your managers do RTW meetings - These should be done ideally before an agent resumes activities and should be supportive and recorded for future reference – often these are done during the shift which may not help if an employee is anxious or stressed as they can often get missed.

03

What is the split of absence LTS and STS - Short term sickness can be symptomatic of issues such as denied holidays, poor culture and management practices? Using MI and tracking this can sometimes identify trends and help you address poor behaviours

SOLUTIONS

Sickness Absence 09 Metric

Are there any persistent STS cases? Tracking trends by agent and by team can highlight persistent offenders and allow you to understand how managers are handling these in line with your policy. Do you have Occupational health resources that team leaders can call upon to support absence cases

04

Do you track patterns e.g., Monday/Friday absences - this again is symptomatic of culture but do your managers identify these trends in return-to-work meetings? Are your team leaders confident to tackle these discussions?

05

Do you have a dedicated sickness absence process that is communicated and followed? - This can help reduce the stress on team managers and help centralise, reduce absence, and communicate policy consistently.

06

Do your team follow the Sickness absence process - is this clearly identifiable and are all managers being consistent with this process. How often do you collectively review this as a leadership team to ensure you are being consistent?

07

What amount of sickness absence is paid/unpaid - sometimes policies can be overly generous and sometimes managers pay outside of policy is this being managed consistently?

08

Sickness Absence

Metric

Where is this recorded - having a central system to record and pay sickness helps identify trends? If you have multiple systems how do these talk to each other so absence isn't missed?

Does your Absence record match your WFM records? If these don't match its often symptomatic of poor tracking or avoidance by team leaders. What exceptions or reporting process exists to ensure these are aligned?

What amount of absence is Authorised/unauthorised where is this tracked and how is this managed? Having a clear Unauthorised leave policy and being consistent with this will help reduce intermittent absence

What percentage of Holidays is available for employees to take - monitoring this regularly will reduce declined holidays and encourage correct usage with extended leave taken through sickness absence policy?

How is this managed based on resource and demand - regular reporting will help reduce sudden need to grant leave avoiding restrictions in scheduling for others. Understanding the future impacts of Long-term absence and how this dovetails with other absence will help you plan effectively

Sickness Absence

09 Metric

What is the capability/performance mgt process for handling persistent sickness absence - having a clear policy that is consistent will help reduce leave through consequence? Do employees take absence due to the stress of being performance managed or badly managed by team leaders?

14

How many agents are on PIP/conduct plans for Sickness - how consistent is this process how often do you level this across departments. High levels of performance management can lead to increased volume of stress related absence and suggests a systemic issue with either the role or the training.

15

How many people have been exited for Absence concerns in the employee lifecycle. Is absence management being proactively managed in line with your occupational health policies or is it being left to continue on without potential workplace adjustments to bring employees back to work safely?

16

What reward/recognition is there for good behaviours relating to attendance? This can have a positive impact but also could encourage presenteeism or fear of taking time off so impacts the individuals and others health by being in work when they shouldn't be

17

Employee Engagement

Metric

Importance of this metric

This is a good precursor to anticipating recruitment challenges and attrition - having a robust attrition plan will help you focus where your efforts need to go in recruitment pipeline but also how much you can invest in your people development and reduce recruitment and training costs impacting your operation

Key questions to ask areas to investigate

What does the reward and recognition programme look like for staff are these driving the right behaviours - are there any unintended consequences eg favouring specific products or poor productivity measures etc

How often do you survey your people - regular feedback and surveys can head off problems before they arise, suggested at least once every 6 months with quarterly pulse checks

What questions do you ask to understand how they would rate or recommend you as a place to work and do you ask for exit reasons for staff leaving, have you checked Glass door for feedback?

How robustly are action plans developed from employee feedback and how much of this is communicated to the team to evidence you are taking action?

Employee Engagement Metric

What outlets are there for employees to share their ideas and feel included to shape the culture or business improvement, is there a reward or bonus scheme for great ideas?

What Continued Professional Development is completed for employees to show internal progression opportunities. Is this actively supported by the managers and can employees have time out to do this in work hours rather than in their own time?

How often do employees have 121's are these documented and stored for further reflection and continuity of actions from month to month - regular and structured 121's can help with development and performance feedback.

How often do employees have team meetings - are these observed and how would your team rate them? Are they having the right conversations with consistent messaging and two-way discussion and feedback?

How often do employees have the chance to have skip level meetings - these are meeting one level up from their direct line manager and often allow for a more strategic led update or insight into business performance and Q&A

Is there an outlet for employees to raise concerns about leaders/role/ways of working outside of direct line mgr. e.g., Speak up/Whistle-blower?

Contact Us in the following ways to learn more

Landline : 0161 718 2624

Mobile : 07824 995454

Enquiries@Fabsolution.co.uk
Garry.Gormley@Fabsolution.co.uk

www.fabsolutions.co.uk

https://business.facebook.com/FABSolutionsUK/

https://www.instagram.com/Fabsolutionsuk/

https://twitter.com/Fabsolutions1

https://www.linkedin.com/company/forensic-about-business-solutions/