KEEP THE BALL ROLLING!

Finding things that need improvement is not a commentary on how the condition came to be, but a recognition of motion.

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"The expression keep the ball rolling is an American variation of an older British expression keep the ball up, which people used idiomatically early in the 1700s to mean *continue something*," according to the website Writing Explained.

This article continues my January 2021 *Pipeline* column, "Get the Ball Rolling," which means to start the action. The action recommended was the undertaking of an internal assessment of your contact center against several assessment criteria we consultants use. If you began that assessment last month, you would be analyzing Strategic Alignment, Organizational Structure, Work Processes and Workforce Management. We will complete the topic with People and Human Factors, Competencies and Training,

Metrics and Performance, and Technology and Systems.

I remind you that an assessment exercise must be inclusive, and hopefully fun and engaging. Involve both the leadership team and the front line. Make discovery exciting! Finding things that need improvement is not a commentary on how the condition came to be, but a recognition of motion. All organizations are constantly in motion and the contact center must be on board to go with the flow. Anyway, who wants to be in a stagnant pond? Yuck!

Whether your operation is a startup or grown up, assessing the current state allows for a thoughtful evaluation of organizational and operational conditions, before these are discovered due to a crisis. This activity is pro-

active rather than the more common contact center pattern, which is often highly reactive. Assessments are more likely to yield "causal" conditions rather than merely the symptoms.

Change is often the result of any good assessment, one in which the entire team has been included from the get-go. The adoption of changes is more easily executed because the team was part of a process that created the change. Folks can better celebrate the successes and overcome the challenges.

Things are tough for many in the contact center industry right now. Whether the assessment addresses growth or serious decline, we learn from all of it. I have seen some incredible leaders emerge from having to manage through difficulty. Learning leads to optimism!

Continue the assessment activities set forth previously and use the following elements to provide a clear picture of your current state. Imagine your future state and devise a plan for eliminating waste while optimizing assets.

People and Human Factors

People are the most valuable asset in the contact center! When assessing a contact center operation, it is critical to review data related to absences, tardiness, turnover, errors, quality and productivity. When these "symptoms" trend below objectives, causal analysis must be undertaken. Study the **overall performance indicators** to monitor the direction that performance is taking. Be

careful to avoid the trap of looking only at agents. Evaluate the current state of frontline managers, as well. Theirs is often a slippery slope that moves them back to working as an agent when conditions are difficult. They often "jump in" to take calls. Measure their utilization... when supervisors spend more time handling agent tasks, there is no one to handle the supervisory functions typically associated with assist and escalation.

Determine the number of hours of coaching, training, meetings, etc., that occur each quarter to gain insight into how much time is being invested vs. how much time was forecasted. This exercise assumes that there is a **scheduling record** of these activities. If there is not, that becomes your finding. Your recommendation is to have whoever is responsible for workforce management to track these activities. Management also needs this data for budget purposes, as it impacts shrinkage.

Employee satisfaction and morale impact overall attitudes and culture of the contact center. Employee satisfaction is best measured by a survey of some sort. (It is hard to imagine being so out of touch with your environment as to be unaware of employee satisfaction.) It is ridiculously easy to conduct, even if you have to do the survey with paper. Think of questions (combining a five-point scale and free-form text) such as: "How satisfied are you with your position?" "What improvements can we make?" Frontline focus groups also yield surprising results, especially when facilitated by a third party.

Competencies and Training
Desired competencies must be evaluated to determine whether current skill and knowledge requirements still match the job performed. Determine how to assure which competencies must be present at hiring and which you are willing to develop.

The **type of training** that exists (e.g., materials, methods, media and the training resources themselves) matters when evaluating the current state of training. Identify strengths and weaknesses from an organizational and operational perspective. Document the time (e.g., X weeks/months) from hire to proficient; identify gaps and recommend ways to improve.

Ease of access to required information and tools is requisite for frontline agents, supervisors, managers and contact center support teams. How is "information" (e.g., new lines of business, IT/system changes, policies, procedures, products and services) received and distributed? Is there an "information gatekeeper" to filter and route information to the proper party? Are other departments able to email, jabber, etc., directly to frontline agents? If so, recommendations for improvement are needed.

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> ## I can't tell you how excited I am to keep this ball rolling.
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> —ELLIOT HOVEY,
> AMERICAN ROWER

Are agents required to perform keyboard "twister" to complete a call? Conduct a thorough evaluation of the agent user interface and the tasks associated with each activity. This determines the impact of navigation on the customer experience. Call duration, accuracy and quality often suffer when agents are consumed by the transactional elements of a call and neglect elements of the human interaction.

Metrics and Performance
Metrics are abundant in today's contact center, but how to use them... well, not so much. Closely review your **reports catalog**. "Oh, haven't got one"—that's another finding. Here is an easy recommendation: Create one! Determine what metrics really matter. Keep in mind that metrics must be reviewed at multiple levels beginning at the CENTER level and NOT the agent level.

METRIC ELEMENTS
Review all metrics utilized within your contact center; assess center, team and individual performance. The list below offers a solid place to begin your assessment.

Center Level Measures
- Service Level—X% of calls answered in Y seconds
- Abandon Percentage
- Actual to Forecast Volume (all channels, within 5%)
- Actual to Forecast Average Handle Time (within 5%)
- Contribution to Capacity (Agent Time in State, Talk, After-Call Work, Not Ready, Available)—establish upper and lower control limits (range) instead of specific targets
- Adherence to Schedule—includes on-time arrival (and tardiness) for shift/breaks/lunches and unscheduled absence
- Quality
- Errors and Rework
- Transfer Percentage
- Cost/Revenue per Call

Individual Agent
- Contribution to Capacity
- Adherence to Schedule
- Quality—make sure coaching sessions are structured, scheduled and consistent across the contact center
- Errors and Rework—identify process issues as well as performance issues

There clearly may be additional measures, but this list provides insight into your current state. It allows you to identify strengths, weaknesses and top performance issues as well as their impact. Once findings are documented and categorized, formulate recommendations.

Technology and Systems
It is critical to inventory and assess your current contact center technology (e.g., PBX, ACD, WFM, MIS, CRM, desktop information, email and multimedia routing). What is work-

ing? What is missing? What just makes life difficult? Would a workforce management (WFM) system help with proper staffing and improve data analytics? Are reports impossible to get at via your ACD and make analytics tough? Identify all factors that complicate getting at what you need and determine what recommendations to make.

The number of applications utilized in the contact center impact the agent's user interface. If applications have not been integrated, the agent is forced to flip among applications, cut and paste data, and be subject to system timeouts and password resets. All these conditions can cause problems. Your findings must show the impact on quality, handle time and the customer experience. Identify weaknesses in technology and document recommendations and the associated benefits of investing in improvements.

Document Findings and Recommendations

Once your team has completed its areas of assessment, document your findings and recommendations within an **Assessment Report**. The next and last step is sometimes the toughest. It is to create a compelling case/report to senior leadership. For this, be as concise and specific as possible, with backup where necessary. Include a problem statement, the investment requested, benefits expected and the value added. You must identify driving forces, identify/craft recommendations for change, estimate cost and benefits, and document/present to senior leadership for swift approval.

So, keep the ball rolling into higher performance! ⊚

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