



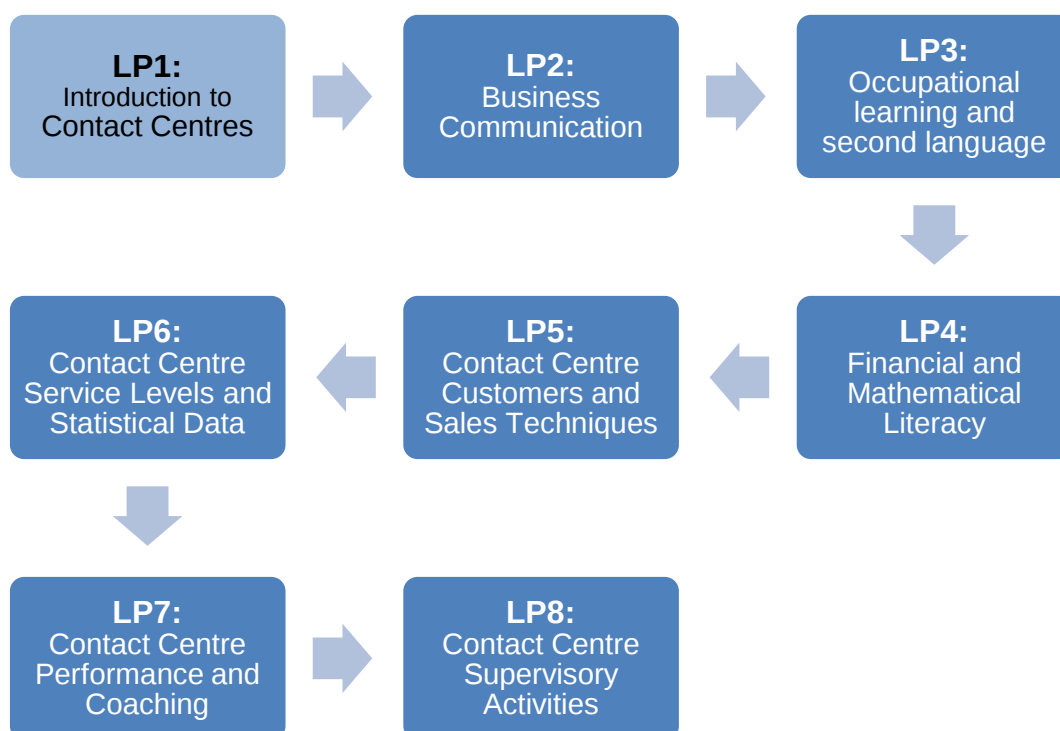
Learner Guide

LP 1: Introduction to Contact Centres

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Programme Overview



Welcome to this learning programme that will lead the learner to a greater understanding of:

- Contact Centres

Programme Outcomes

In this learning programme, we will be covering the following **learning outcomes**:

Module 1: Introducing Contact Centres
• Understand different types of Contact Centres • Understand what happens when a Contact Centre receives a call • Understand the systems used by the Contact Centre • Understand the interaction of “other” contact centre staff with processes

Module 1

Introducing the Contact Centre

After completing this module, the learner will be able to understand contact centres, by successfully completing the following:

- Understand different types of Contact Centres
- Understand what happens when a Contact Centre receives a call
- Understand the systems used by the Contact Centre
- Understand the interaction of “other” contact centre staff with processes

Introducing the Contact Centre

A **contact centre** is a facility used by companies to manage all client contact through a variety of mediums such as telephone, fax, letter, e-mail and increasingly, online live chat.

Contact centres, along with call centres and communication centres all fall under a larger umbrella labelled as the contact centre management industry. This is becoming a rapidly growing recruitment sector in itself, as the capabilities of contact centres expand and thus require ever more complex systems and highly skilled operational and management staff.

Many companies use contact centres as a way of managing their customer interaction. These centres can be operated in two major ways, the first, by having an in house department responsible for the day to day communications with customers, the second to outsource customer interaction to a third party agency.

Sometimes a contact centre is just one or two people sitting beside a phone answering customer calls. Often it's a very large room with lots and lots of people neatly organized into rows, sitting beside their phones, answering customer calls.

The modern contact centre handles phone calls, e-mail and online communication. Contact centres deal with any type of contact for a company (other than in-person) - contact with the general public and customers of all types: potential, happy, or even disgruntled. To a customer or client, contact centre personnel are the voice and face of the company.

1.1 Types of Contact Centres

Contact centres are either ***inbound*** or ***outbound***.

An inbound call centre is one that exclusively or predominately handles inbound calls initiated by the customer. Examples of inbound contact centres are:

- Customer Service
- Directory Inquiries
- Emergency Services
- Inbound Sales Contact Centres

An outbound call centre is one in which call centre agents make outbound calls to customers on behalf of a business or client. Examples of outbound include:

- Telemarketing
- Sales
- Fund-raising calls
- Contact list updating
- Surveys or verification services
- Collections

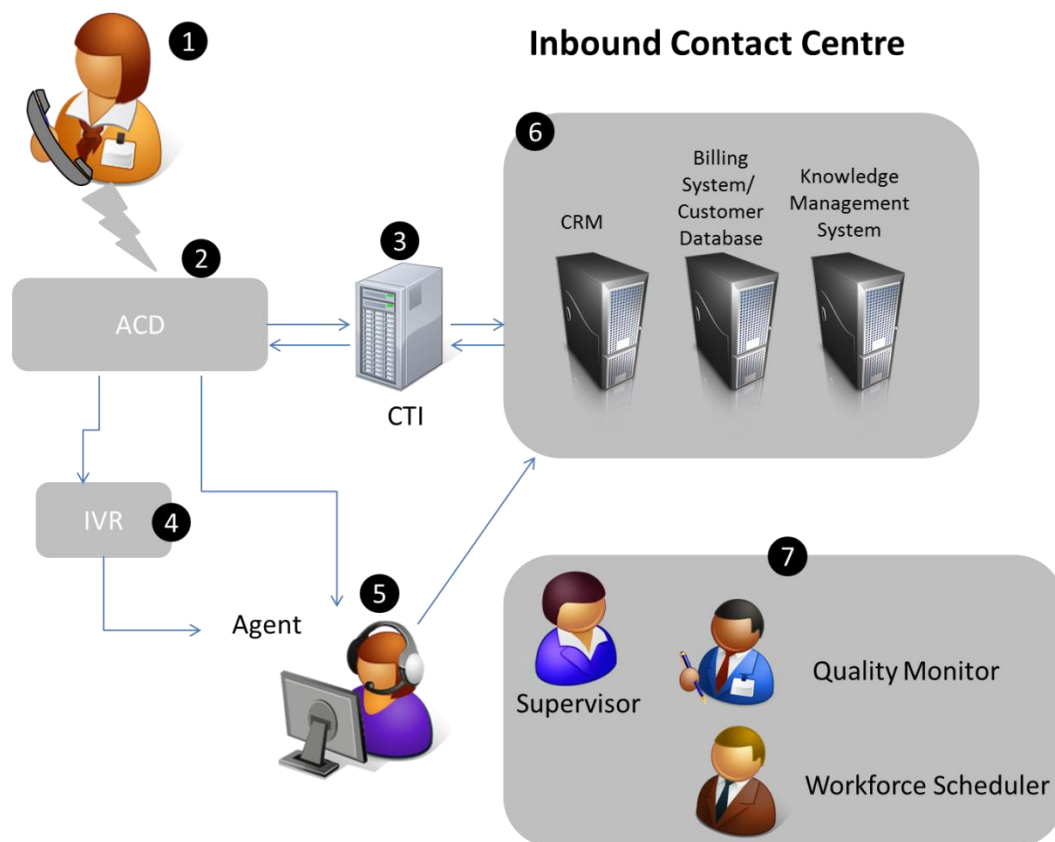
A call centre may handle either only inbound or outbound calls or might deal with a combination of the two. An outbound call centre uses distinct metrics to measure

agent success, such as cost per call, revenue earned, total calls made and tasks completed. An inbound call centre uses different metrics, such as first call resolution (FCR).

1.2 What happens when the Contact Centre receives a call

For many people, calling the contact centre seems simple. You dial the number provided, listen to a few options and then finally you speak to a person on the other side of the line.

The reality is very different. The following diagram is a simple depiction of what happens when you call into the contact centre.



We will use the numbers to explain each step in the process in detail.

Step 1: Caller dials the number to make contact with the Contact Centre

To initiate the call, the customer will use their cell phone or landline to dial the number. There will be two very valuable pieces of information at this stage.

The first one will be the **ANI** or Automatic Number Identification. This is the number that the caller is calling from. You might wonder why this is important. When a call is placed, the call is transferred via the network (MTN, Cell C, Vodacom, 8ta or Telkom network) to the ACD (Automatic Call Distributor). The ACD can then make routing decisions based on the ANI. For example, if you called from a landline in the Gauteng area, the ACD could route you to the Customer Service department closest to you.

This is convenient because the call will be cheaper and the agent that takes the call will be better informed about the region.

Let's use a very practical example. If you dial 10111 from your landline, your call will be routed to your closest police station. This can only be done because the system is using the ANI to identify your number and your location.

If you are calling from a cell phone, the ANI can be used to help the company identify you. If your number is in their database, they can use it to route the call appropriately. Think about this for a moment. If your customers called into the Contact Centre, who would you want to serve first? The guy that spends thousands of Rands with you on a regular basis or the guy that spends a lot less and mostly phones to complain? All calls must be answered but the high value customer should receive preferential treatment. You can get all of this by using the ANI to identify your callers.

The second piece of information that you receive is the DNIS or Dialed Number Identification Service. In other words, what number did the customer dial? This information is particularly useful if you have various promotions running at the same time. You can use the DNIS to correctly route the call to the agent that is equipped to handle that call.

Every contact centre that you ever call will make routing decisions based on this information. As a low value customer you might be offered self-service options while the high value customer is routed to the next available agent.

Step 2: The ACD accepts the call

When is the last time you received a busy signal when you call into a customer service department? It does not happen often.

ACD's can manage multiple incoming calls at the same time. The only time you will not be able to reach a contact centre is when all the trunks (lines) are busy.

In the early days of the call centre, people used to refer to the PABX (Private Automatic Branch Exchange) all the time.

PABXs make connections among the internal telephones of a private organisation—usually a business—and also connect them to the public switched telephone network (PSTN) via trunk lines. Because they incorporate telephones, fax machines, modems, and more, the general term "extension" is used to refer to any end point on the branch. When you called into the PABX, you would either need to speak to a switchboard operator to direct your call or you had to dial the extension of the person you wanted to talk to. If the extension was busy, your call will be routed back to the switchboard operator.

With the ACD, there are multiple choices for distributing incoming calls from a queue.

- Linear Call Distribution – Calls are distributed in order, starting at the beginning each time.
- Circular/Rotary Call Distribution – Calls are distributed in order, starting with the next in order.
- Uniform Call Distribution – Calls are distributed uniformly, starting with the person who has handled the least calls.

- Simultaneous Call Distribution – Calls are presented to all available extensions simultaneously.
- Weighted Call Distribution – Calls are distributed according to a configurable weighting.

Other functionalities of an ACD can include:

- Universal queue for voice, email, chat, social media and more
- Route calls based on agents' skill levels
- Automatically call back customers who don't want to wait
- Inbound/outbound call blending
- Pull in essential customer data from CRMs
- Easy for non-techies to use and update
- Seamless integration with IVR

Skills-based ACD software can quickly match callers in the queue to the agents who can best help them. That means efficient call resolution, happy customers and money saved. ACD is the “core” of the any Contact Centre.

Step 3: The ACD connects to the CTI server

The ACD connects with the CTI server where it can use the DNIS or ANI to help identify the caller. The CTI server will connect to the companies back-end servers like the billing system, or the customer database or CRM (Customer Relationship Management System) database.

CTI (Computer-Telephony Integration) is the use of computers to manage telephone calls. The term is used in describing the computerised services of call centres, such as those that direct your phone call to the right department at a business you're calling.

CTI applications provide the ability to do one or more of the following:

- Authenticate callers. Using one of several standard methods, the telephone number of the caller can be screened against a database.
- Recognise a voice, either for authentication or for message forwarding
- Using live, recorded voice, or touch-tone entered input, determine how to process a call (for example, by forwarding it to the appropriate person or department)
- Provide interactive voice response (IVR) to callers
- Match the number of a caller with a customer record and display to the agent reference when talking to the caller

- Collect and display pending live calls or messages that have been left by callers
- Receive fax messages and route them to appropriate fax machines
- Based on call input, initiate a smart agent application to provide help with the caller's request

CTI applications tend to run on either a user's desktop, or an unattended server.

Common desktop functions provided by CTI applications

- Screen popping - Call information display (caller's number (ANI), number dialed (DNIS), and Screen pop on answer, with or without using calling line data. Generally this is used to search a business application for the caller's details.
- Phone control - Includes call control like answer, hang up, hold, conference, etc. and feature control like call forwarding.
- Transfers - Coordinated phone and data transfers between two parties (i.e., pass on the Screen pop with the call.).
- Call centre - Allows users to log in as a call centre agent and control their agent state (Ready, Busy, Not ready, Break, etc.).

From this point forward, the way the call is managed depends on the organisation. Some companies will route all incoming calls to the IVR. Here the callers can choose to use self-service or to speak to an agent.

However, based on the caller information the call could be routed directly to the agent. This could be because the caller has been identified as a high value customer or because the caller dialled the number for a special sales promotion.

Step 4: The ACD routes the call to the IVR

The IVR (Interactive voice response) is a technology that allows a computer to interact with humans through the use of voice and DTMF or Dual-tone multi-frequency signalling tones input via keypad. The version of DTMF that is used in push-button telephones for tone dialling is known as Touch-Tone.

In telecommunications, IVR allows customers to interact with a company's host system using the telephone keypad or speech recognition. This allows the caller to service their own inquiries by following the IVR instructions. IVR systems can respond with pre-recorded or dynamically generated audio to further direct users on how to proceed. IVR applications can be used to control almost any function where the interface can be broken down into a series of simple interactions. IVR systems can handle large call volumes.

An IVR system consists of telephony equipment, software applications, a database and a supporting infrastructure. Common IVR applications include:

- Bank and stock account balances and transfers

- Surveys and polls
- Office call routing
- Call centre forwarding
- Simple order entry transactions
- Selective information lookup (movie schedules, etc.)

One¹ of the most common uses for an IVR system is to route calls within an organization. In the past, you'd hire a receptionist or a switchboard operator to answer all incoming calls and route the callers to the right extension. An IVR system is especially useful when fielding customer-service calls. The system can present a caller with a list of menu options and questions about the nature of the call. If possible, the system itself can answer more frequently asked questions and route the rest of the calls to trained specialists.

IVR systems are ideal for retrieving simple, real-time information from a database. Movie times are a good example. Each week the movie listings are updated on a central database. This database can also be used to populate the movie theatre's Web site. When a call is made to the theatre, the caller can look up movie times in the database through voice or keypad commands. The same system can be used for checking account balances, reviewing recent credit card purchases, checking flight schedules, refilling prescriptions at a pharmacy, scheduling car maintenance, university class registration. The list goes on and on.

IVR systems are also useful for sales. A sales department can set up an IVR order form that callers can fill out using their telephone keypad. When the form is complete, the computer can then fax or e-mail a copy of the form to a member of the sales staff. A sales department could also use the IVR as a virtual brochure highlighting the features of a product or service with an option for speaking to a live representative at any time.

Marketing departments and political pollsters can use the outgoing call features of IVR systems. A political campaign could set up an outgoing message that includes a poll that voters can fill out over the phone. A marketer could gauge a customer's interest in his products or services. For those interested in the marketer's automated pitch, they could press a key to talk to a sales associate.

IVR systems can also be used as electronic notification systems. Let's say your organization has employees who work from home and are based around the world. The IVR system can be programmed with employee contact information: home phone number, cell phone, fax number, pager, e-mail address, et cetera. If a call needs to be routed to that employee, the IVR system will try each and every contact method in succession until a connection is made.

If the caller was able to resolve their call in the IVR they will hang up. However, the caller could still choose to speak to an agent. The call will then be routed to the call queue where the next available agent will attend to the caller.

¹ Read more at: <http://electronics.howstuffworks.com/interactive-voice-response2.htm>

Step 4: The ACD or IVR routes the call to the agent

Agent, CSR (Customer Service Representative), operator or customer liaison. These are only some of the names used for the person that will take your call.

To be a contact centre agent, you need to have the right qualities. Contact centres is central to the success of businesses because they are the nerve centre of customer care, an essential requirement for maintaining existing customers while attracting new ones. The following are some of the unique but interrelated qualities of good agents that top companies look for.

Good Customer Care Skills

Call agents are supposed to be people who possess the requisite customer care skills necessary for meeting the objective of maximising sales and productivity through excellent customer relations. Having an outgoing and friendly personality is an asset in the field of customer relations contact centres. A good agent must have a people-oriented attitude that enables him or her to handle customers as though they are the most important people in their (the agents) lives.

Agents need to be always mindful of the fact that no matter how difficult existing customers may be, it is easier to maintain them than attracting new ones. Good agents are those who are able to use their unique customer relations qualities to turn every inbound or outbound call into an opportunity for having another customer. Adequate knowledge of phone etiquette is crucial for excellent customer care. A good agent therefore needs to be a master of phone manners.

Understanding Individual Differences of Customers

Different customers behave differently. Good agents are those capable of demonstrating their understanding of the diversity in customer behaviour. Operators have to appreciate the uniqueness of each customer. Some consumers can be difficult to handle, some could be furious over a previous transaction they are not satisfied with, while others could even be abusive while on the phone with an agent. But good call centre operators are those who will always appreciate the fact that business success (and the survival of their job, for that matter) depends on consumer satisfaction and will thus do their best to satisfy the consumer.

Good Communication and Listening Skills

Contact centre jobs mainly involve communicating with consumers. Effective communication skills is therefore an essential attribute that agents seeking to work with good call centres should possess. A good communicator is also a good listener. Professional agents are those who are good communicators and listeners. Findings of a study by US-based *Beta Research Corporation* and published on its website of underscored the need for effective communication skills on the part of consumer centre operators.

The study, titled: "Customer Satisfaction as it Relates to Call Centre experience," revealed that most customers prefer to speak to live agents who communicate with them effectively rather than with an automated system. Effective communication skills is therefore required of every good customer relations person.

Language Abilities of Agents

Telephone communication between agents and customers involves the use of language. Contact centre agents should therefore have good command over the particular language or languages used for transacting business in the geographical areas companies are located. Due to the globalisation of business transaction as well as the practice of call centre outsourcing, multilingual agents are usually preferred.

As much as possible, agents should strive to learn a second or third major language to boost their chances of working with global or multinational customer care centres. English remains the dominant language for business transactions but being fluent in an additional major language such as Afrikaans, Zulu and/or Xhosa becomes a great asset.

Computer Literacy

Computer literacy is an important requirement for working with modern customer service facilities. Most centres now use web-based software like predictive diallers. Operators would have to be computer-savvy, particularly in Word processing, and use the internet to be able to work efficiently.

Effective² agents should have the competencies, personal attributes and skills to communicate effectively with different people in a professional way, without personal feelings influencing the process. The agent should listen without being distracted by surroundings or personal matters. An effective agent would be attentive, ensuring accurate and detailed information. The agent would show understanding of the customers' predicament and make an effort to understand the customers' specific needs. Having the 'correct' attitude includes being friendly, considerate, self-motivated, professional, helpful, confident and pleasant. An effective agent would consistently maintain a friendly and professional attitude, regardless of the customer's attitude, the time of day, or any personal matters. They would stay in control of the interview at all times; be a knowledgeable agent who has knowledge regarding the product or service, the research, the company, research methods and the terminology of the research project.

The agent will access various systems to assist the caller. We will discuss the applications in detail in later.

Even though it may seem that the agent is a lone soul attending to your calls, that is very far from the truth. Agents are monitored by a host of support staff and supervisors at all times. In the next section we will look at the various roles in the contact centre.

1.3 Systems used by the Contact Centre

Calls are routed in the contact centre, using the ACD, CTI and IVR systems. These are all call management systems. Later in this section we will look at the tool used to manage Outbound Call Campaigns. This is called Predictive Dialling.

The MIS(Management Information System) will use information from all of these systems to help them manage their daily operations and to make strategic decisions for the organisation.

Workforce Management Software(WFM)

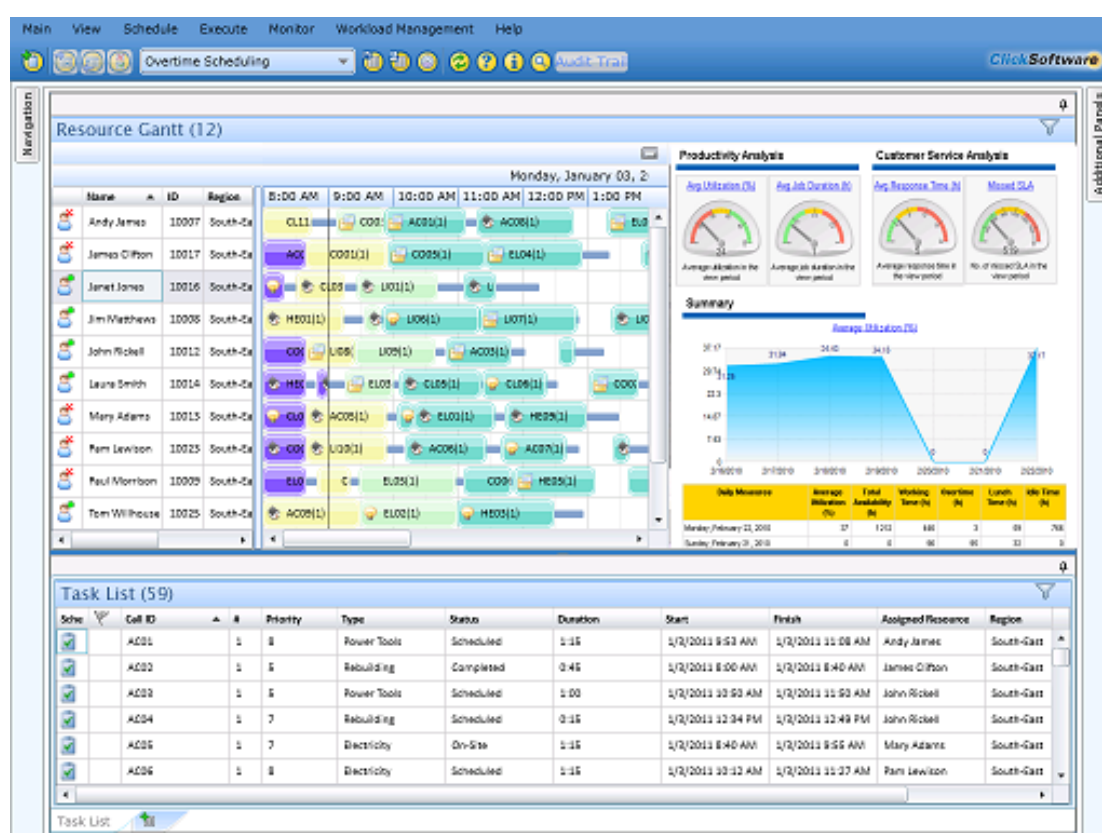
The Workforce Management system uses call statistics that they source from these systems to do forecasting and scheduling. Workforce management solutions can be deployed enterprise-wide. While special software is commonly used in numerous

² Information from: *Core Competencies Of A Call Centre Agent* by Christine White and Vera Roos

areas such as ERP (enterprise resource planning), SLM (service lifecycle management), CRM (customer relationship management) and HR (human resources) management, the management of the workforce is often still handled by using spreadsheet programs or time recording. This often results in expensive overtime, non-productive idle times, high fluctuation rates, poor customer service and opportunity costs being incurred.

In contrast, by using a software solution for demand-oriented workforce management, planners can optimise staffing by creating schedules that at all times conform as closely as possible to the actual requirement. At the same time, a WFM solution helps users to observe all relevant legislation, local agreements and the contracts of individual employees – including work-life balance guidelines.

Here is an example of Workforce Software



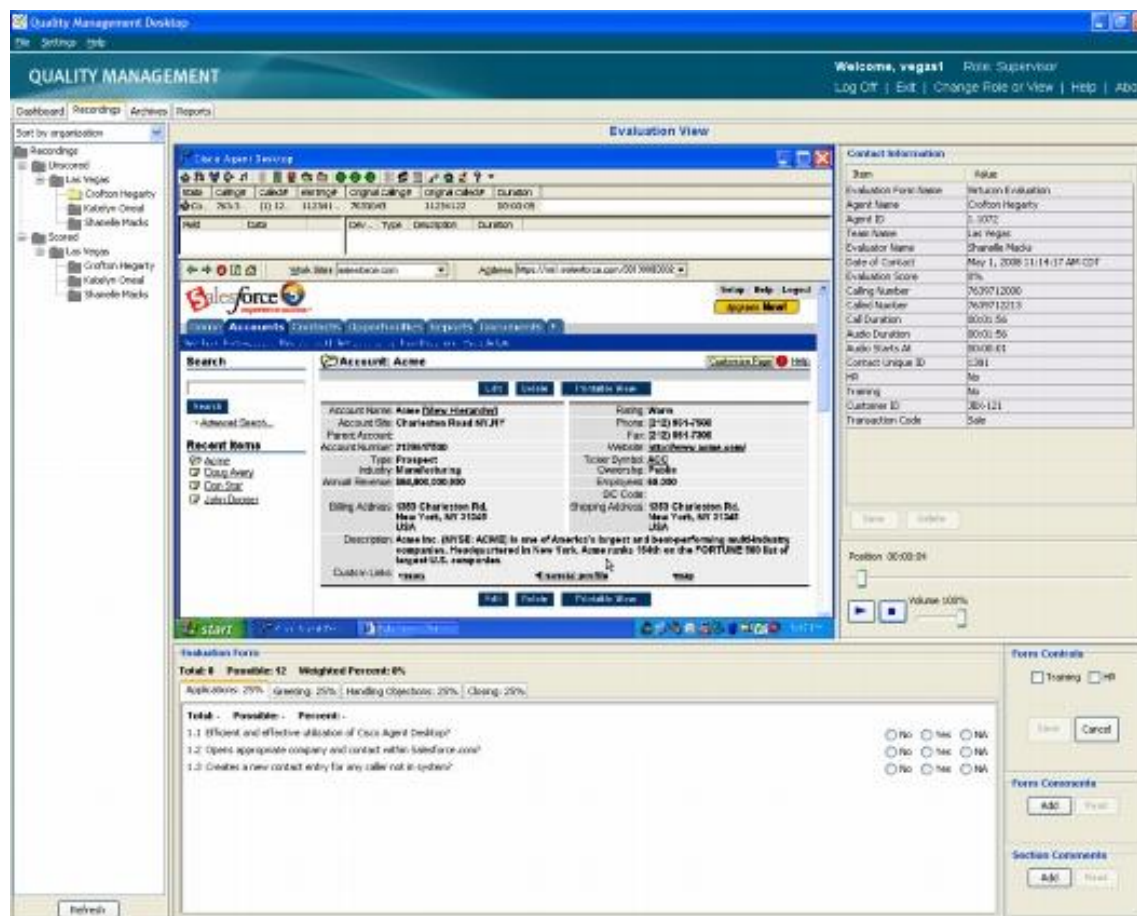
Quality Management Software(QMS)

A quality management software system that is automated and connects all departments is essential for a regulated or ISO-compliant company. A QMS or a TQM (total quality management) system can connect each phase in a product's development lifecycle with every department in a company. This gives everyone an opportunity to provide feedback. Automated routing, with escalation, ensures the rapid responses to inputs needed from other departments. By building quality into products as opposed to forcing QA to bear the burden of the responsibility, everyone (engineering, regulatory, QA, manufacturing, sales and marketing) wins.

The use of Quality Management Software helps increase the quality unit's efficiency and effectiveness by automating task assignment/routing, scheduling, follow-up,

tracking, escalation, review, and approval of all documents-based processes. It provides a single repository for all documentation, making search and retrieval easy.

Here is an example of Quality Management Software:



Customer Relationship Software (CRM) or Customer Database

Customer relationship management (CRM) is a model for managing a company's interactions with current and future customers. It involves using technology to organize, automate, and synchronize sales, marketing, customer service, and technical support.

CRMs can be used to create, assign and manage requests made by customers, such as call centre software which help direct customers to agents. CRM software can also be used to identify and reward loyal customers over a period of time.

CRM is a term originally defined and designed to improve customer service. Today it almost relates to an entire business strategy. So while the term refers to a systematic approach to handling customer relationships, it transforms into providing holistic approach to a business strategy.

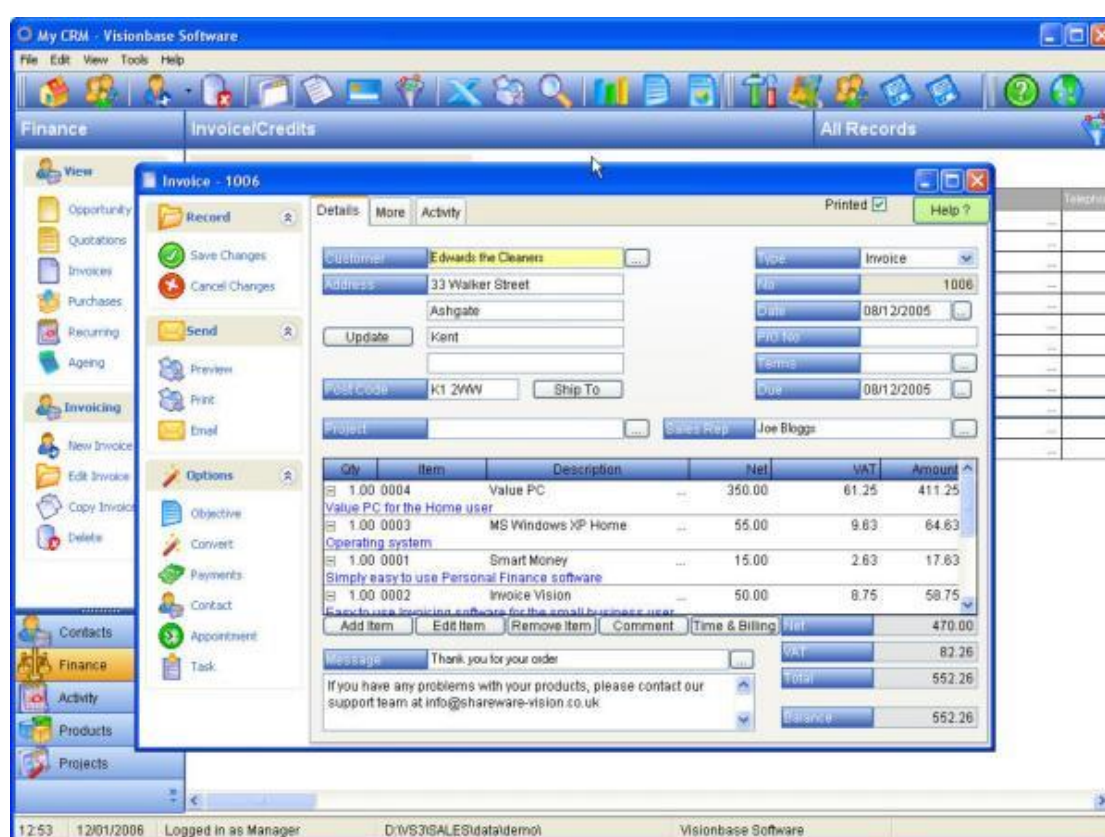
Customer refers to an entity that acquires or consumes goods or services from a desired firm (through the process of purchasing or renting) for a mutually decided price and has the ability to choose between different products and suppliers. In this sense a customer is also known as client, buyer, purchaser or user of the

products/services delivered or provided by a firm or organization also called the supplier, seller or the service provider.

Relationship in business refers to a state involving mutual dealings between people or parties. It involves interactions with customers or prospects to better understand their requirements and to build an expectation through different channels of communication. The more one interacts, the more chances of building a strong business relationship on the grounds of proper understanding of customers.

Management refers to managing of customer interactions. This does not merely mean customer support but in its true sense aims at mobilizing the entire organization towards management of all interactions with the customers, thus involving a customer-centric thinking and acting.

Here is an example of CRM Software:



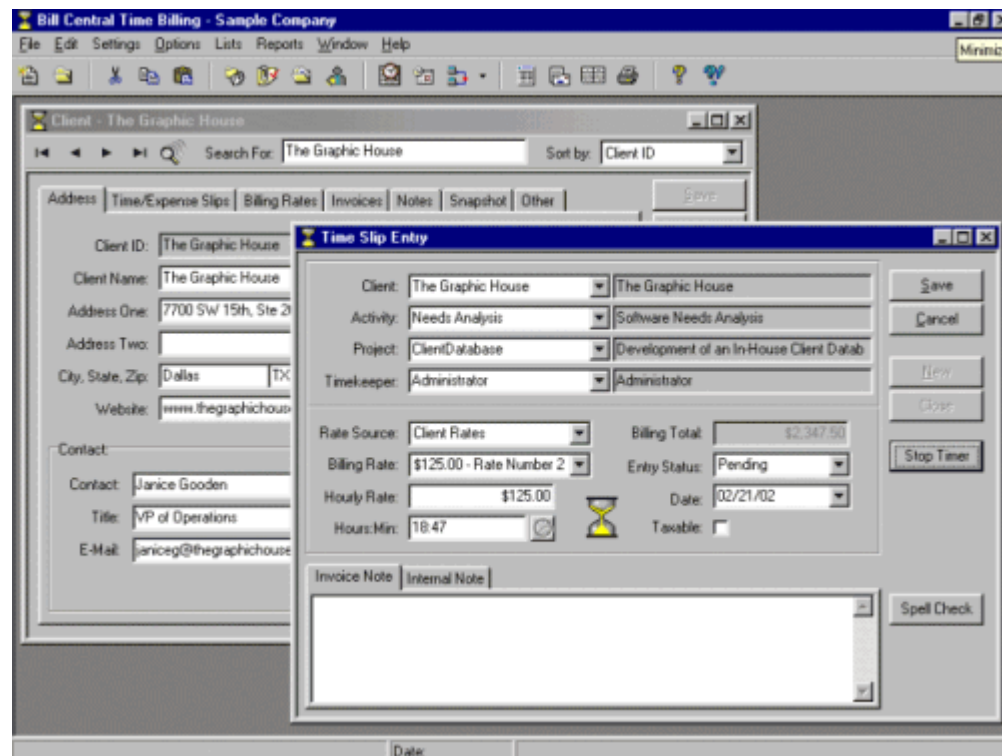
Billing System Software

Software designed to handle time and billing tracking as well as invoicing customers for services and products. Billing software can track the hours worked by employees as well as expenses associated with projects or clients.

Most time and billing software applications also create billing cycle reports to display information such as hours worked, expenses incurred, how much to bill clients, and which clients owe money for specific projects.

Popular time and billing software tools include Sage Timeslips, Intuit QuickBooks Time and Billing Manager, Billing Tracker and kBilling.

Here is an example of a Billing System:



Agents will have access to the billing system to assist customers with account queries. It is important to make sure that the agents are well trained on how to use the system because there needs to be data integrity for customer billing operations.

Knowledge Management

Knowledge management is a discipline that promotes an integrated approach to identifying, capturing, evaluating, retrieving, and sharing all of an enterprise's information assets. These assets may include databases, documents, policies, procedures, and previously un-captured expertise and experience in individual workers.

Seeking to improve the efficiency and effectiveness of customer service, leading enterprises have turned to knowledge management—and realised significant, quantifiable results. The following are five key benefits that knowledge management enables via customer service improvements:

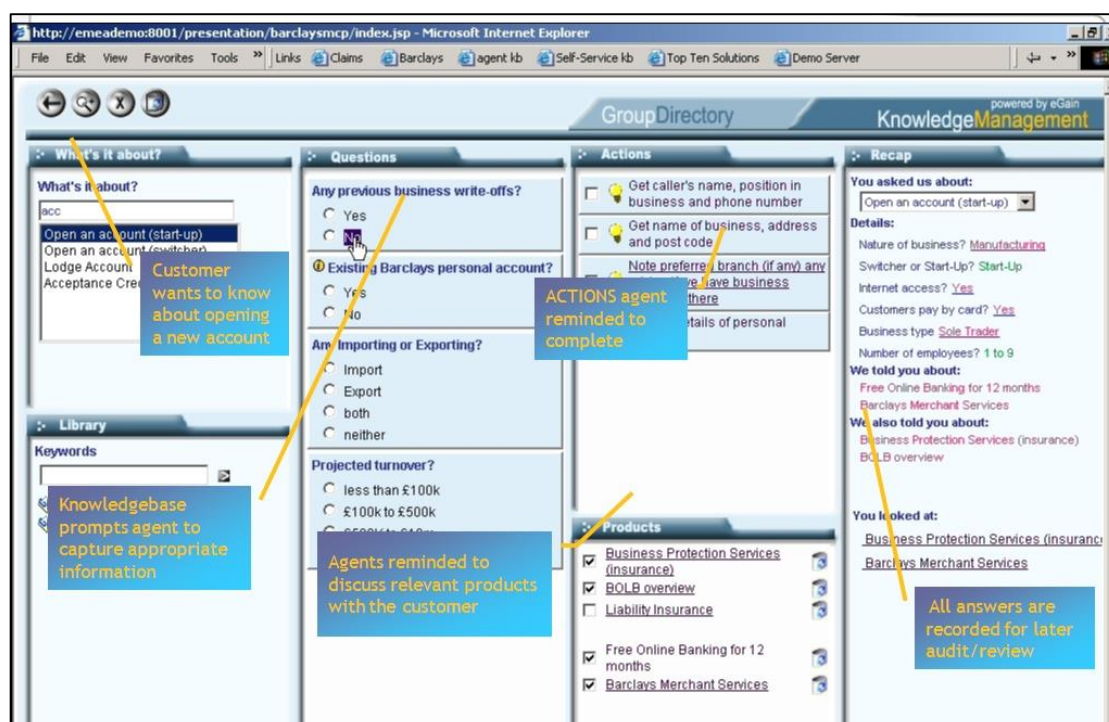
- Reduced research time
- Increased resolution accuracy
- Reduced training time
- Management of increasing service volumes
- Creation of service insight

As companies support more-complex products and broader product portfolios, the challenges of quickly and efficiently resolving customer issues multiply. The result is that fewer cases are resolved with the first call.

Most of the time agents spend on the phone is engaged in research, discovery, and communication of their search results to the customer.

The majority of the time agents spend on the phone (80 percent) is associated with research and discovery. By implementing knowledge management solutions for call centre agents and customers seeking self-service, companies can increase their service efficiency and delivery.

Here is an example of Knowledge Management Software:



Looking ahead, the challenges of customer service and support will only get more complex and more demanding. Reducing research time, increasing resolution accuracy, reducing training time, managing increasing service volumes, and creating service insight will all be instrumental in helping to build your brand value while simultaneously managing the costs of your customer support operations. Whether your focus is on reducing costs or improving the customer experience, there has never been a better time to investigate the benefits and productivity improvements of a complete, comprehensive knowledge management platform.

Predictive Dialler Software

Predictive dialling³ uses a computer-based system that automatically dials groups of telephone numbers, and then passes calls to available operators or agents in a calling centre once the calls are connected. The most common use of predictive dialling is in call centres which make large amounts of calls, such as those run by telemarketing companies. Predictive dialling was introduced for the purpose of increasing efficiency within calling centres. Prior to its development, most call centres used devices known as autodiallers, which were merely computers equipped with

³ Information from: <http://www.wisegeek.com/what-is-predictive-dialing.htm>

telephony boards that could dial a number without a caller having to manually enter it on a keypad.

Predictive dialling is far more advanced than using an autodialler because it monitors calls made to see how they are answered. If the call goes unanswered, is met with a busy signal or answering machine, or reaches a fax machine, the predictive dialler immediately ends the call. Only calls that are answered by a live person are put through to an operator. Therefore, productivity is increased because callers do not have to listen to unanswered calls or wait for someone to pick up.

Predictive dialling is so named because it predicts when callers will become available to take a new call, and dials calls in advance. When a person answers the phone, predictive dialling puts the call through to an agent, although there is sometimes a brief delay as the predictive dialler attempts to determine whether the person's voice is a recording, in which case the call is ended. The system essentially predicts how many of the dialled calls will be answered and how many callers will be free to take them. The goal in using predictive dialling is to avoid having agents in a calling centre sitting idle.

These predictions are based on statistics collected by the predictive dialler as it monitors calls, such as what percentages of calls are answered. The predictive dialler then places a number of calls based on a predetermined parameter, such as the ratio of available phone lines to available operators. Because these numbers are constantly changing, computer algorithms incorporated into the predictive dialler will increase or decrease the number of calls dialled as this ratio shifts. Predictive dialling systems are judged on how well they keep callers from sitting inactive and how well they avoid silent calls -- calls in which a live person answers the call but there is no agent to take it, and so the predictive dialler ends the call.

There are then three types⁴ of dialling modes that you can select from, dependent on your budget, the technology available to you, your outbound objectives and the availability of data.

Auto-Dialling

The first is auto-dialling, which can be configured to automate dialling of the next telephone number. There is no need for a pre-planned dialling strategy to be in place but this solution is more aligned to B2B calling environments where there is a high answer rate and more call planning is usually required.

Power Dialling

The second is power dialling, which is similar to predictive dialling as it will dial multiple telephone numbers within a campaign and seamlessly pass live calls to an available agent. This type of dialling strategy is usually adopted by companies who are entering into outbound for the first time and do not have the capital to invest in a predictive dialling solution and/or do not want to go down the route of a hosted dialler. Inevitably, with both the auto and power dialling, all numbers dialled are passed to an agent, including deadlines and answer machines which can have a negative impact on agent productivity.

Predictive Dialling

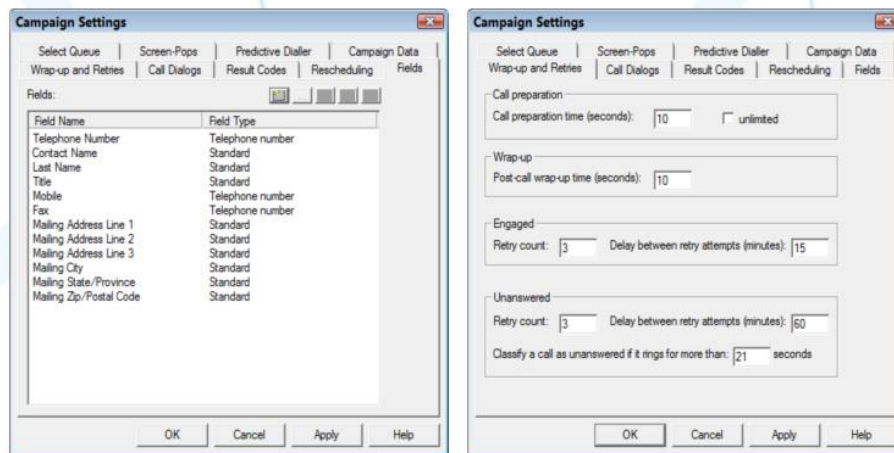
The above limitation is eliminated with a predictive dialling solution, which can be configured to begin dialling whilst agents are engaged on another call. The predictive

⁴ Information from: <http://www.callcentrehelper.com/>

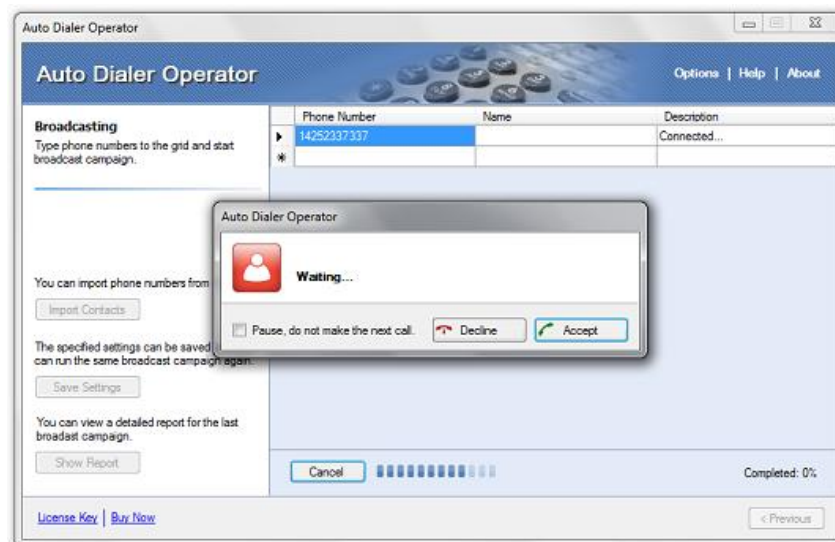
dialler will estimate the agent's average talk time and pre-dials the next call to reduce the time between the agent's calls. With predictive dialling, the dialler management team would need to take into consideration abandoned calls and delivering the right amount of wait time through the provision of connected calls to the agent.

A predictive dialling solution will enable you to quickly cycle through outbound call lists; this highlights the importance of getting your data right and aligning your call list strategy with your dialling strategy.

Here is an example of Predictive dialler software:



The first screen demonstrates how a campaign is created. The next screen shows the dialler from the agent's perspective.



Dashboards in the Contact Centre

The term “dashboard”⁵ refers to a single screen information display that is used to monitor what's going on in some aspect of the business. The key word is “monitor.” A dashboard presents the key data that you must efficiently monitor to maintain awareness of what's going on in your area of responsibility. Most dashboards are used to monitor information once a day, because more frequent use is unnecessary

⁵ Information from: Dashboard Design for Real-Time Situation Awareness by Stephen Few,

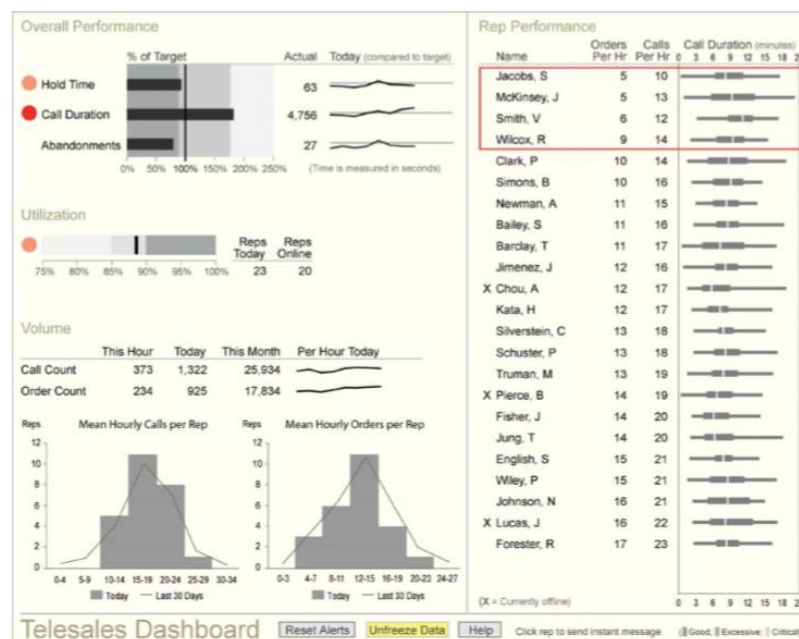
given the rate at which the information changes and speed at which responses must be made. Some jobs, however, require constant monitoring in real time, or close to it, because the activities that you track are happening right now and delays in responding can't be tolerated. There is perhaps no better example of this type of dashboard than one that monitors the brisk and sometimes harried activities of a call centre.

Much like air traffic control systems or cockpits in airplanes, call centre dashboards must be designed to support real-time "situation awareness." They must grab your attention when it's needed, they must make it easy to spot what's most important in a screen full of data, and they must give you the means to understand what's happening and respond without delay. To do this, they require expert visual design and must express measures of performance clearly, accurately, directly, and without distraction.

When they are properly designed, dashboards can provide a powerful means to monitor what's going on at a glance. Two characteristics of a dashboard are largely responsible for this ability:

- Their visual nature
- The way they integrate everything you must keep track of, however disparate, onto a single screen

Here is an example of a Well Designed Dashboard for Situation Awareness



Here are some of the positive principles and practices that will lead to an effective dashboard:

- Use flicker and sound to grab attention
- Encourage active thinking about the data, not just passive reaction to alarms
- Don't over-automate actions to the point where people become disengaged
- Provide smooth and simple means to respond
- Provide a common picture for the whole team

- Support projections for proactive responses
- Match the mental model

Partly due to their visual nature, people have a tendency to dress dashboards up with all sorts of visual nonsense. Any visual content that doesn't express data or isn't necessary to support the presentation of data in some useful way, however, is a distraction. Dashboards are not an appropriate venue for artistic expression; they are displays that we use to monitor important information. This information should stand out clearly without competition.

1.4 The interaction of “other” contact centre staff with processes

The agent's job is to answer all incoming calls that arrive at their desk. Nothing in the contact centre happens in isolation. Every call is monitored and logged. There is not a step in the call process that cannot be traced by the Telephony Systems team.

They are able to tell how many calls was offered, how many calls was abandoned and at what stage of the call. All of this information is used by the “other” contact centre staff to manage, monitor and plan every aspect of the contact centre agents day.

Workforce Scheduler

We will start with the Workforce Management Team. This team is made up of Workforce schedulers and planners. Workforce Management started out by predicting incoming call volumes on single queues and creating rudimentary shift plans. This has evolved into a sophisticated multi-dimensional mechanism for managing many contact channels, media and skills, virtual contact centres and agents.

Workforce Management (WFM) is basically all the activities needed to maintain a productive workforce, including payments and benefits, human resources planning, training and development, time-keeping and attendance, recruitment, performance management, and forecasting and scheduling. In essence it is about assigning the right employees with the right skills to the right job at the right time to meet demand while optimising the scheduling of staff.

The Workforce scheduler is responsible for doing Workforce Forecasting, Scheduling and Adherence Monitoring.

Workforce Forecasting

The refrain is common: we need to adhere to our targeted service levels... but at the same time, we also need to keep staffing costs down. Whether in a contact centre or bank branch environment, workforce managers everywhere face the constant challenge of balancing the priorities of service levels and labour costs. This is especially true in today's economic environment where inaccurate forecasts can lead to poor scheduling decisions and can have dramatic impact on bottom line profitability. Workforce management (WFM) software has long been used to match demand in the form of calls, emails, web chats and other agent work with supply in the form of the agents themselves. Regardless of the sophistication of the WFM tool or processes, the foundation of optimising staffing levels lies in the precision of the forecasting engine.

More precise forecasting is a classic win-win scenario, enabling managers to more closely align demand and supply resulting in optimal cost and profit performance.

When demand (inbound calls, outbound calls, emails, web chats, etc.) is greater than supply (the agents themselves), the price, in the form of reduced service levels, falling customer satisfaction and poor agent morale, rises. When supply is greater than demand, service levels tend to improve, but at the cost of idle and unproductive agents. The key to optimising the bottom line performance of your contact centre is to find a harmonious balance between supply and demand. This bottom line performance is directly impacted by the direct costs of hiring and employing your agents, but it is also influenced by client satisfaction, agent morale and other factors.

A solution which provides historical data from entire customer contacts (i.e. from CTI as well as the ACD) means that scheduling can take place in a more realistic way. Enterprises should also be able to factor in exceptions, such as advertising campaigns, training and public holidays, and view when the best time for a meeting or training session will be, and measure the impact on the rest of the contact centre. Running regular hypothetical 'what-if' scenarios can show a scheduler how alterations to shift-patterns would impact performance, as well as assisting in business continuity by seeing what would happen in a flu epidemic, for example.

A great deal of unnecessary agent work can be removed by identifying the types of call that are being received, and determining whether these could be reduced further up the line, in the departments whose activities actively affect the volume and type of calls received, e.g. marketing or IT (for the website). As such, workforce management is increasingly being used as part of an overall quality or performance management suite, which can include quality monitoring, HR management and training as well as the traditional workforce management forecasts and schedules, as all of these factors affect each other.

For example, understanding when and how other departments will be operating means that workforce management tools can be used to forecast and schedule accordingly (e.g. about a new TV advert). Additionally, contact centre management is able to brief agents - via a desktop broadcast if at short-notice - about the correct responses and issues, as well as changing IVR prompts and messages to provide answers to the more simple answers, and managing agent skill-sets for relevant call groups.

Businesses should look for flexibility in forecasting functionality: situations can develop very quickly, so forecasts can become useless without the ability to alter schedules dynamically to reflect reality.

Workforce Scheduling

Now that a precise forecast has been developed, we shift our attention to the supply side of the equation – the agents. In an ideal world, there would always be enough appropriately skilled agents to handle each call as it arrived to satisfy service level, customer satisfaction, cost and revenue objectives. However, as we all know, the contact centre is rarely, if ever, a perfect world.

To state the obvious, every agent is different. They have different skills, competencies, proficiencies and schedule preferences. In addition, myriad external factors affect an agent's ability to perform well. Completing the balance means

creating schedules that match the right agents to the projected work based on these factors.

Relatively speaking, creating the initial schedule is fairly easy and most of the commercial WFM products do it pretty well. It's when agents start calling in sick, or call volumes are different from what was forecast, or agents leave and return from meals and breaks early or late that the real fun begins. The best scheduling plan is not set in stone. Rather it can be easily adjusted by workforce analysts and supervisors who are close to the action.

Powerful process automation wizards can make this job much easier. Say an agent calls in sick or is going to be late for their shift. A couple of simple keystrokes in a wizard can note the agent's disposition and immediately identify potential replacements based on user-defined factors. For those agents calling in sick, this wizard can also identify whether or not that agent had previously requested time off for that day that had been rejected. This is not only a powerful and efficient scheduling tool; it also helps identify agent coaching opportunities. Intraday management, the real-time shifting of agent schedules in the heat of battle, if you will, is also made much easier through process automation wizards and drag-and-drop user interfaces. Extending or shortening an agent's schedule is easily accomplished in this manner. Advanced WFM systems will also provide immediate feedback regarding impact to service levels, workload fit (the relative balance between supply and demand) and agent costs.

- Use recurring and non-recurring events to create a precision forecast. Forecasting best practices suggest that more accurate forecasts enable more effective scheduling.
- Be prepared for frequent changes to your staffing plan. Agents call in sick, will be late, will need to leave early, won't leave or return from meals and breaks on time for a variety of reasons. Streamline the schedule-change process to reduce administrative overhead (and associated costs!) and ensure key metrics continue to be met.
- Consider your overstaffing and understaffing impacts independently. Have a keen understanding of what factors drive the business. If customer satisfaction is your top priority some overstaffing may be desirable, even if it results in increased agent costs. If revenue generation and profit maximisation are most important, then understaffing may be desirable.

Adherence

Adherence is the ability to compare forecasts with reality, and learn from mistakes. Sophisticated scheduling and forecasting is useless without the opportunity for improvement brought about by adherence monitoring.

Real-time adherence monitoring allows managers to see exactly what is happening, and can alert them to deviations from the expected activity, allowing them to make changes before problems occur. Adherence allows a business to fine-tune its contact centre activity. Put simply, the more you use it, the more accurate your forecasts and schedules become.

This is another area where the cerebral activity of traditional workforce management has become more dynamic. Real-time reporting on schedule adherence, and the ability to access this information through a web browser or mobile phone means that

dynamic changes can be made to the system. In the more sophisticated solutions, 'workforce management' has now become 'workforce performance management'.

For example, adherence does not have to refer to the contact centre as a whole, as WFM solutions enable contact centre managers to monitor and manage agent performance in real time, by connecting to the ACD system and monitoring the status of an agent's activity (for example, time spent logged on against planned work schedules). Agent adherence and non-adherence can then be acted upon quickly, and used to support performance appraisals.

Businesses should look for a solution which is simple to understand (so staff will feel comfortable using it) yet retains the power and functionality to help the contact centre manager understand what has happened and to make changes quickly if necessary.

Quality Monitor

Most call centre quality monitoring is done by people rather than software. Speech recognition software is improving, but has not yet reached the point where it is preferred over human monitors. In most companies, Quality Monitoring is the responsibility of the supervisors. In some contact centres this role is supported by a Quality Monitor or Assessor.

The information captured by the metrics of a call centre monitoring program are essential to the cost effective operation of the call centre and the capturing of vital customer feedback on quality, performance, and service.

Quality monitoring solutions are used all over the world.

They have been developed in order to enable evaluation of all business conversations regarding criteria of quality determined by the company in a standardised and comparable way.

The following functions are provided to supervisors/trainers:

- Selective recording of calls (voice and screen) according to a variety of user-defined or project-specific parameters
- Easy and comfortable search for calls according to user-definable criteria (agent, content, time of day, CTI event)
- Highly flexible generation and use of evaluation templates
- Easy creation and distribution of management reports
- Conversion of calls into instructive examples using additional functions (eCoaching)
- Integration of agents as active parts into the Quality Monitoring process
- eLearning and eCoaching capabilities to close the loop between recording and evaluation of agents

Agent Feedback

Quality monitoring lets agents evaluate themselves or fellow agents. This capability double-checks the supervisor's opinion and motivates agents through increased involvement in the evaluation process.

Active Coaching

Quality monitoring lets the supervisor use authentic voice files for instant coaching.

Remarks or additional advice can be added to recorded calls and provided to agents. “Best/worst practice” examples may be created by trainers or supervisors and rapidly distributed.

With agent assistance tools the agent can contact the supervisor in real time without the customer's knowledge. Supervisors may respond with instant messages (via the chat window), take over the call or even take control of the agent's PC.

Typical call recording triggers

To complete the definition of the parameters, numerous decision criteria for the recording are available.

- **Number of calls per agent per month**

The most widespread trigger is to record a set number of calls per agent per month.

- **Percentage triggers**

It is also possible to define static criteria, e.g. “Record ten percent of the sessions per agent”.

- **CTI parameters**

By integrating quality monitoring into the PBX or ACD system, further triggers become available.

In some situations it could be beneficial to trigger monitoring at the start of the recording process, e.g. “record exclusively transferred calls”.

In VoIP environments the recording can be triggered according to IP addresses.

- **Phone number list**

Phone numbers (internal, external or additional) can be used as recording criteria, e.g. a 'white list' (callers on these phone numbers have to be recorded) or a 'black list' (callers on these phone numbers are not to be recorded) could be defined.

- **External triggers**

You could determine if an agent will be able to manage (start/stop) the recording. This operation could either be executed by software on the agent's computer or by pressing a key on the system phone.

Schedule parameters

These parameters help to fix temporal rules for the recording, e.g. record exclusively on Mondays from 8 am to 9 am.

It is also possible to trigger the recording according to the length of a call, e.g. “record only calls that are longer than 60 seconds”.

Typical Quality Monitoring tasks

- Definition of evaluation templates
- Initiating measures for quality evaluation
- Evaluating the quality
- Interpretation of the individual evaluations

- Definition of training package templates
- Allocation and administration of training package templates
- Consolidated analysis of quality measures
- Targeted planning of speech analytics

Benefits of Quality Monitoring

Customers

- Improved customer service
- Personalised relationships
- Reduced hold times and transfers

Agents

- Effective training and coaching
- Improved job skills
- Increased motivation

Supervision

- Effective management
- Sensitivity to service quality
- Transparent communications

Companies

- Increased loyalty
- Reduced employee turnover
- Improved productivity
- Continuous improvement process
- Reduced training costs

Quality Monitoring Process

1. Develop a "scorecard" that will be used to measure the subjective metrics, such as customer courtesy. Make sure you get input from all stakeholders, including the employees who will be handling the calls.
2. Listen to the calls. Typically the calls are recorded in case there is any difference of opinion on the scoring or to reinforce training points. The quality monitor can listen to the calls live, as they happen, or listen later to the recorded calls. The former is preferred.
3. Score the call based on the scorecard developed at the beginning of the program. These scores are then made available to the company management to see if they are meeting their goals (KPI) and so they can take appropriate action.
4. Data analysis of the scores tells management how well they are doing, what's going well, and where further training is needed. It also can highlight where changes need to be made to the scripts the sales team follows or to the procedures the service team uses. Done right, it provides excellent

information on the "Voice of the Customer" that is critical to the company's customer satisfaction program.

5. Select a sample of calls to use to calibrate your scoring. Everyone involved in scoring needs to periodically evaluate the same call and compare scores to make sure scoring is standardized.

By monitoring a statistically significant number of calls, scoring them against a calibrated scorecard, and providing those data to everyone involved, a company can maximize the value of its call centre and call centre employees.

Supervisor

Today's call centre supervisor⁶ is routinely expected to be a combination of expert service provider, coach, trainer, mentor, motivator and manager. Compounding this already significant challenge, supervisors are expected to put out daily fires, prepare reports for management and oversee agent performance across multiple channels of interaction, including telephone, e-mail and chat. In this demanding environment, it is difficult—but imperative—for often overextended call centre supervisors to learn best practices and to acquire the skills and techniques that enable them to achieve and even exceed their goals.

Call centre supervisors are expected to be "renaissance people" who excel at a variety of roles and responsibilities. They must be excellent multi-taskers, combining the ability to manage and coach agents, handle challenging customers, readily shift priorities, prepare management reports, and lead call centre initiatives while ensuring that service level and quality objectives are achieved. Supervisory job responsibilities change frequently, but generally include the following tasks:

- Meet monthly key contact centre performance goals for customer satisfaction, quality, productivity and key performance metrics.
- Monitor and evaluate agent monthly performance, including call/email and after-work monitoring (using call recording and quality assurance applications), review productivity and attendance reports, and coach staff members to improve performance.
- Conduct formal agent performance reviews, including annual goal-setting/performance development plan, mid-year performance review, and final year-end performance review. Assist agents with career development.
- Ensure that customers' questions and problems are resolved properly and quickly. Address challenging customers and problems that require escalation outside of the department.
- Report, analyse and resolve system, customer and operational issues that impact service quality. Strive to provide all customers with an outstanding customer experience.
- Build, establish and maintain open lines of communication with agents, peers, trainers, managers, QA specialists, Engineering, Marketing, Manufacturing and other areas of the company to facilitate problem solving.
- Stay informed of all new products and services and ensure that agents are properly trained to handle questions about any of them.

⁶ Information from: Call Center Supervisor Best Practices by DMG Consulting LLC

- Support and promote all company and departmental sales, service and quality initiatives.
- Interview and hire prospective agents, technicians and senior technicians.
- Assist in administering team attendance records, salary plans, vacation and staffing schedules and forecasts.
- Build and maintain a positive working environment that attracts and retains high- quality staff.
- Be visible to agents. Supervisors should walk around periodically to perform live monitoring of agents, compliment agents for on-the-spot performance, and assist agents struggling with calls.
- Plan and manage a range of non-phone activities for agents, including workshops, call centre cross-training, eLearning courses, knowledge reinforcement and brainstorming sessions.

Supervisors set the tone for their team. The most effective supervisors create a welcoming work environment by establishing a rapport with their agents that encourages teamwork, creativity and excellence. When agents feel that they are valued, respected and treated fairly by their management, they will be highly motivated to perform well and deliver outstanding service to their customers. Agents' jobs are often demanding and stressful. Supervisors can relieve the tension by creating a positive, supportive and collaborative environment.


Class Activity 1: Introduction to Contact Centres

Individually or in small groups, under the guidance of the facilitator, complete the following:

1. Describe the type of Contact Centre you are working in:

2. Explain the following abbreviations:

ANI	
ACD	
DNIS	
CTI	
IVR	
CSR	

3. Rate yourself on a scale of 1 (poor) – 5 (excellent) on the following customer care skills. Ask your partner to check your rating and discuss whether s/he agrees:

Skill	Rating
Understanding Individual Differences of Customers- make an effort to understand the customers' specific needs	
Good Communication Skills – able to communicate effectively with different people in a professional way	
Good Listening Skills- able to listen without being distracted by surroundings or personal matters	
Computer Literacy	
Professional- friendly, considerate, self-motivated, helpful, confident and pleasant	
Knowledgeable- knowledge regarding the product or service	

Areas for improvement:

Place any extra evidence after this page, clearly marked for easy reference.

References and Further Reading

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