

Attributes of a Great Contact Center Metric

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Agenda

1. Why are the attributes of metrics important?
2. Attributes of great performance metrics (and poor ones)
3. Combine or not to combine: Score cards or exam-type math
4. Letting agents see or naah?

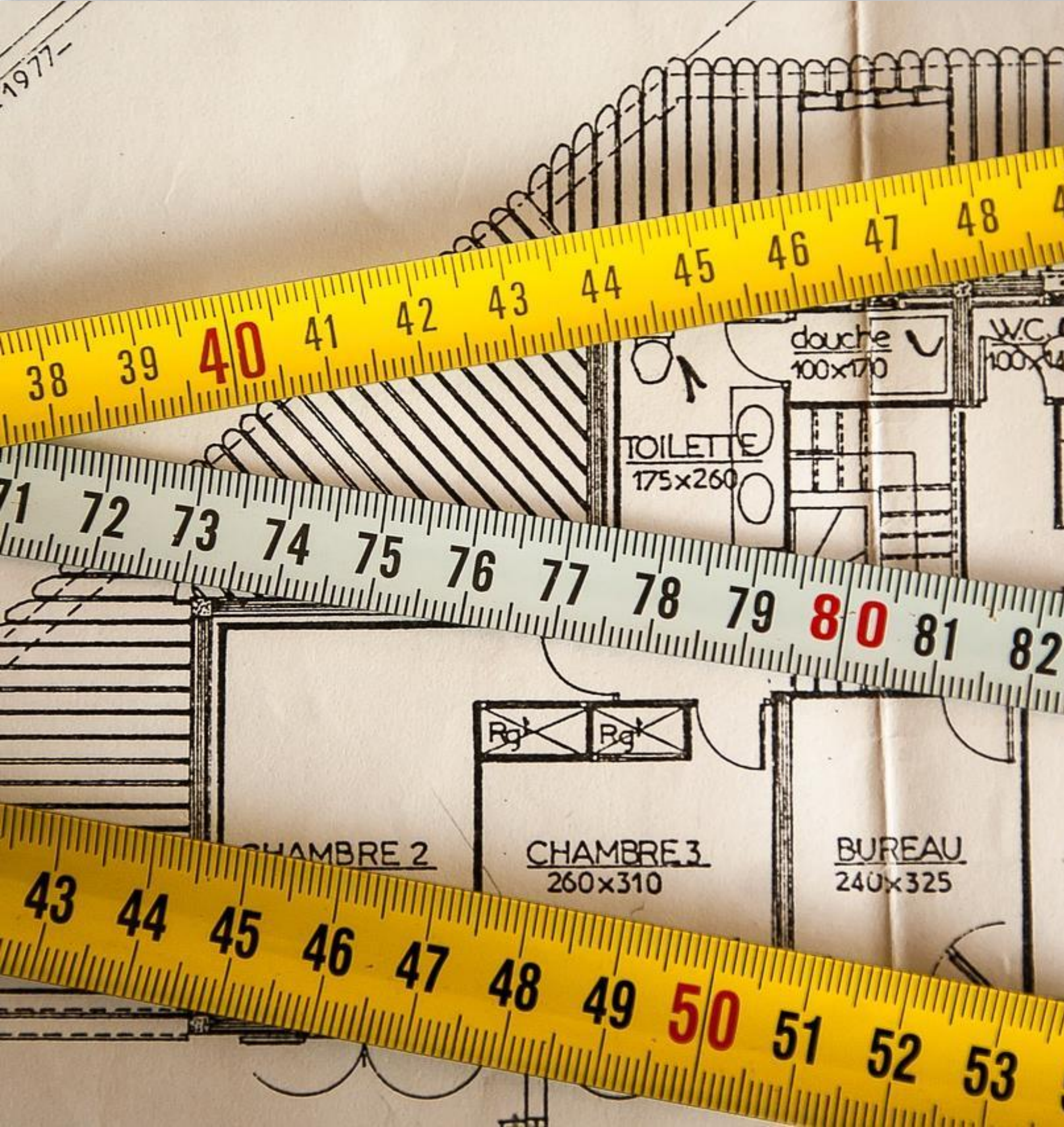
Why do we measure?

1. Make decisions
2. Ensure performance(← The focus of this session!)

(Gratuitous picture of my son)



Performance Management



When you want to improve something, the first thing you need to do is to start measuring it

Performance Management

A happy employee is one who knows they are performing well, and knows others know it, too.

(This is what you see when you google “happy call center agent”)



Performance Management



*If incentive pay
is tied to
performance,
through
measures,
these metrics
will be
manipulated to
extremes*

Incentive pay is a hassle for managers



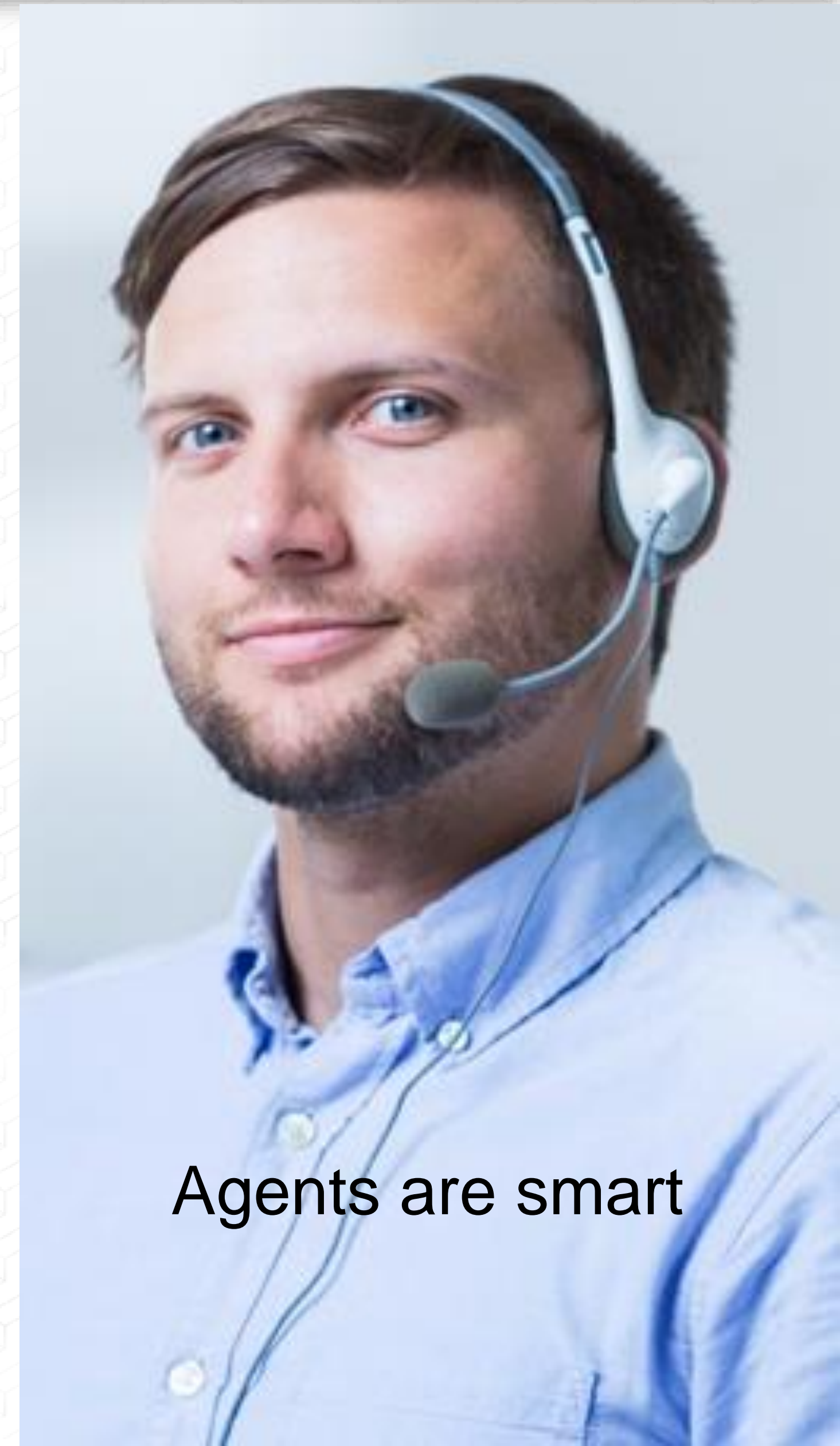
- The best you can do is to try and minimize manipulation
- Try and find the triggers before the plan is announced– and monitor!
- It is important to identify the serious gamers early
- However, remember that incentive pay is *extremely* effective as a motivator!

Metrics need to be hard to manipulate and not corrupting

Performance metrics— especially if they are part of incentive pay— will be manipulated by agents (because agents are human). Examples:

- If we measure handle time, agents can manipulate their performance by simply hanging up early on the customer
- Customer satisfaction scores can be improved by asking customers to score high!

One suggestion: throw out best and worst X number of observations?



Agents are smart

What are the attributes of a great metric?

Your agent metrics are a statement of what you think is important

- Any agent level report, dashboard, gamification, or performance “tile” is *your announcing what good performance is*
- What you measure tells agents what to do:
If agents follow your guides, then they should be considered successful

▲ **02:37**

My Avg. Handle Time

(02:50 Goal)

*13 seconds faster than goal
and 2 seconds faster than last week.*

Nice. 👍

15th of 87

▼ **87%**

My Avg. Customer Experience

(90% Goal)

*You're trending below the goal of 90%.
Review your recent Scorecards [here](#).*

40th of 87

▼ **61%**

First Contact Resolution

(65% Goal)

*This is the number of customers that
reach back out for help within 7 days.*

65th of 87

Metrics need to be measurable

Sounds obvious, but there are many metrics we would like to use that are simply difficult to measure:

- Agent-level queue transfers are hard to measure in some ACDs
- First Call Resolution can be difficult to get an honest measure
- Omni-channel or skill mix handle time or sales goals may be difficult to determine objectively (when there are mix of skills/channels each agent handles)
- Personal (omni) occupancy may be impossible in some ACDs
- Hold time/exception status must involve discipline for the metric to be accurate
- (Omni) competency is just difficult

If you try and measure “unmeasurables” and present them to agents, agents will know

Unmeasurable measures require ingenuity

Nothing is unmeasurable (contradicting myself), but we need to be smart

- *System generated* statistics can often be great proxies (e.g. call backs for FCR)
 - If you think statistically, then a lot of the “exceptions” that cloud our thinking go away
- It may not be what you measure, but what you measure *against*:
 - Omni-channel measures can be different for all agents and for different times: your goal can be based on what each agent sees
 - For example, if one agent sees 14 calls and 12 emails, they get measured differently than an agent who sees 10 calls and 18 emails. The goal will shift as each channel brings its own goal
 - The overall goal changes relative to the mix they see: they get goals set per work item (for both skills and channels)

Your performance metrics need to be actionable

Whatever performance metric you choose, it must be personally actionable.

- For example, service level is not individually actionable by agents, but schedule adherence is
- Service level is (sort-of) actionable by workforce managers, but team meetings/adherence are often not
- Handle times are mostly actionable by agents, but outliers need to be understood (and taken out of the statistics?)
- Calls handled, as a goal, is only acceptable under very strict conditions (everyone works the same hours, call volumes and AHT's are fairly consistent)

Don't measure something out of an agent's personal control!

Competing metrics should be simultaneously reported

Handle time and FCR are in competition (sort of). You can't manipulate one, without hurting the other. They are countervailing metrics

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Agent QA scores can be a catch-all, if observations are numerous enough

We should measure data that is plentiful

- Sporadic measures, like quality control scores are great for coaching, but not great as a statistical measure
 - Sometimes “luck of the draw” if chosen randomly
 - If I only get a few data points each week, outliers have too much of an impact on the performance tally
 - Sporadic measures cannot create an accurate trend
- It would be great to use our systems to spot which calls to listen to (for coaching purposes)!

A metric should measure reliable data

- If a reported value is sometimes right, it means that it is also sometimes wrong
 - Is your QA score consistent and rigorous (calibrated?)?
 - Do you believe your survey data? Really?
 - Are there some measures that look odd sometimes?
- If a metric's accuracy is suspect, we don't want to add importance to it by putting it on a report

If our metric is sketchy, then our report is not believed, then we are not believed



Measures and agent goals need to be fair



(Don't stretch too much)

- Goals can be either motivating, unmotivating, or even demotivating
 - Stretch goals— if unrealistic for an agent— can be demotivating
 - Goals that are out of an agent's control are unmotivating and can breed resentment
- Watch out for using averages as your starting point – if the average is not calculated for a specific agent segment
 - Goals segmented by skills and tenure?
 - New hires should be treated differently than seasoned reps

Rollups and allocations need to be accurate

Performance metrics aren't just for agents, but also for team leaders and managers.

- Rollups can be complex. The rollup of performance metrics must consider the nuances of the differences of these teams.
- For example, even if skilled the same way, one supervisor's performance may be naturally different from another, if her agents work a night shift (because the blend of contacts are different)
- Similarly, allocating idle time, say, down to a group that handles multiple types of contacts must be well thought through, or the performance metrics will be biased.

Our different multiple reports need to be consistent

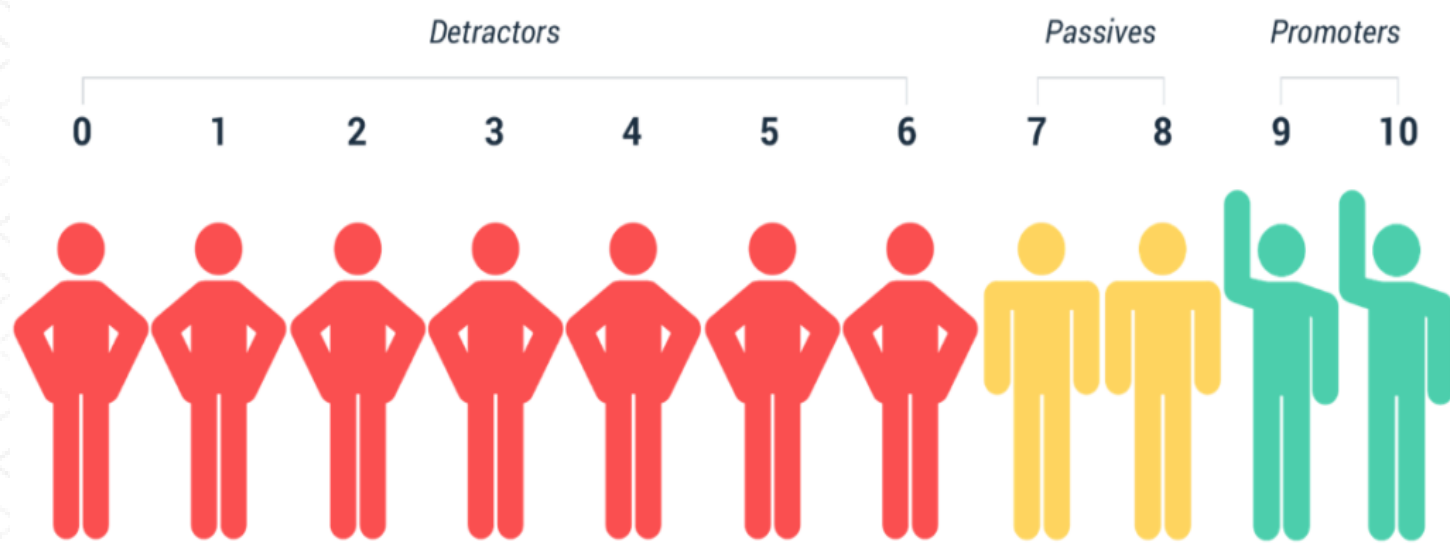
- Heaven help you if your metrics-- seen by employees-- don't add up to their incentive performance statements
- Make sure you have one source for important agent-measuring data, and that it is accurate



Some metrics I like, and some metrics I don't

Some metrics I really don't like

- *NPS:*
 - Nobody thinks like this. Net Detractor Score better?
 - Does it measure the agent or the company?
 - Are your customers honest?
- *Employee NPS:* We *know* employees aren't all honest! (everyone is also worried about being identified)
- *FCR by survey* (see above)
- *Service Level*
 - It doesn't tell you what your customers feel. We need to have an intuition about what the metric means!
 - ASA change of, say 3 seconds, lets you count to "3-Mississippi". Abandons have real meaning. But a change from 90 to 75% SL means what?



Some metrics I really like

- Logical quality question (not NPS). I just heard from a very smart customer: if you owned a business, would you hire this phone agent?)
- FCR: as defined automatically (did they call back)?
- ASA and the distribution of speed to answer—a picture of what customers feel
- Distribution of number of transfers: how many customers bounce around your network?
- Agent hold time distribution
- Agent satisfaction right now (and often)



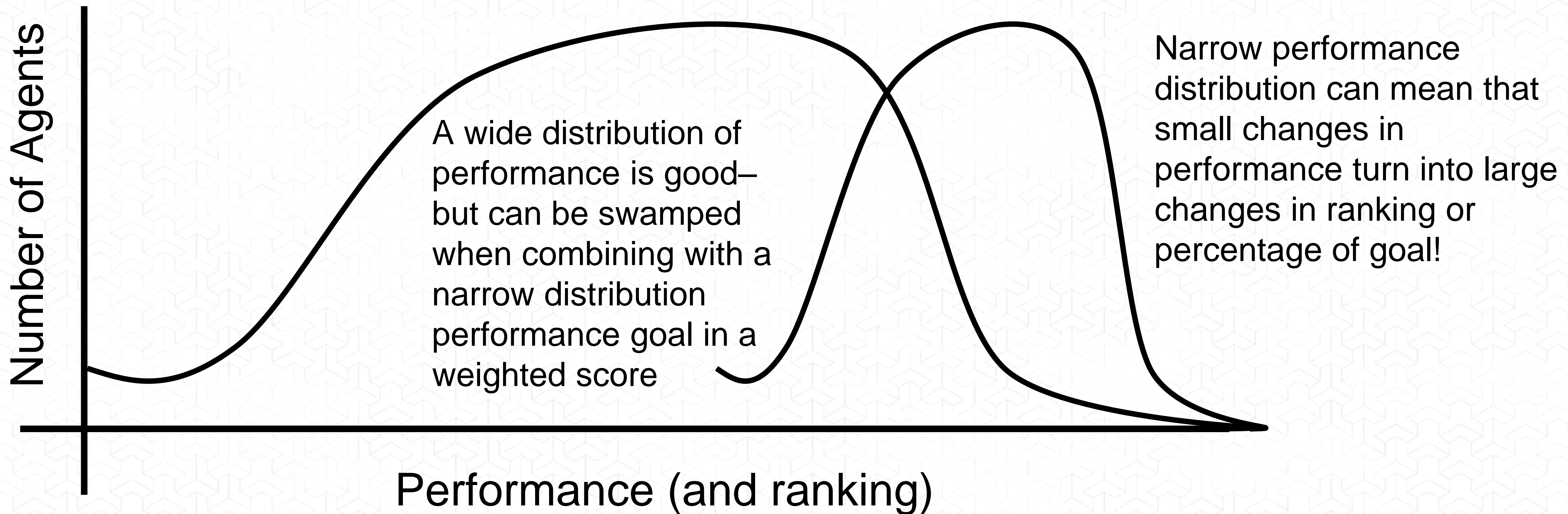
I don't love weighted average single scorecards

- Percentage of an average multiplied by a factor:
 - Does it really tell an agent exactly what to do?
 - Does it tell a supervisor what to coach?
 - If we have two agents with the same score, are they equally as good? Do they perform the same?

The scorecard needs to be a GPS— tell us all what to do!

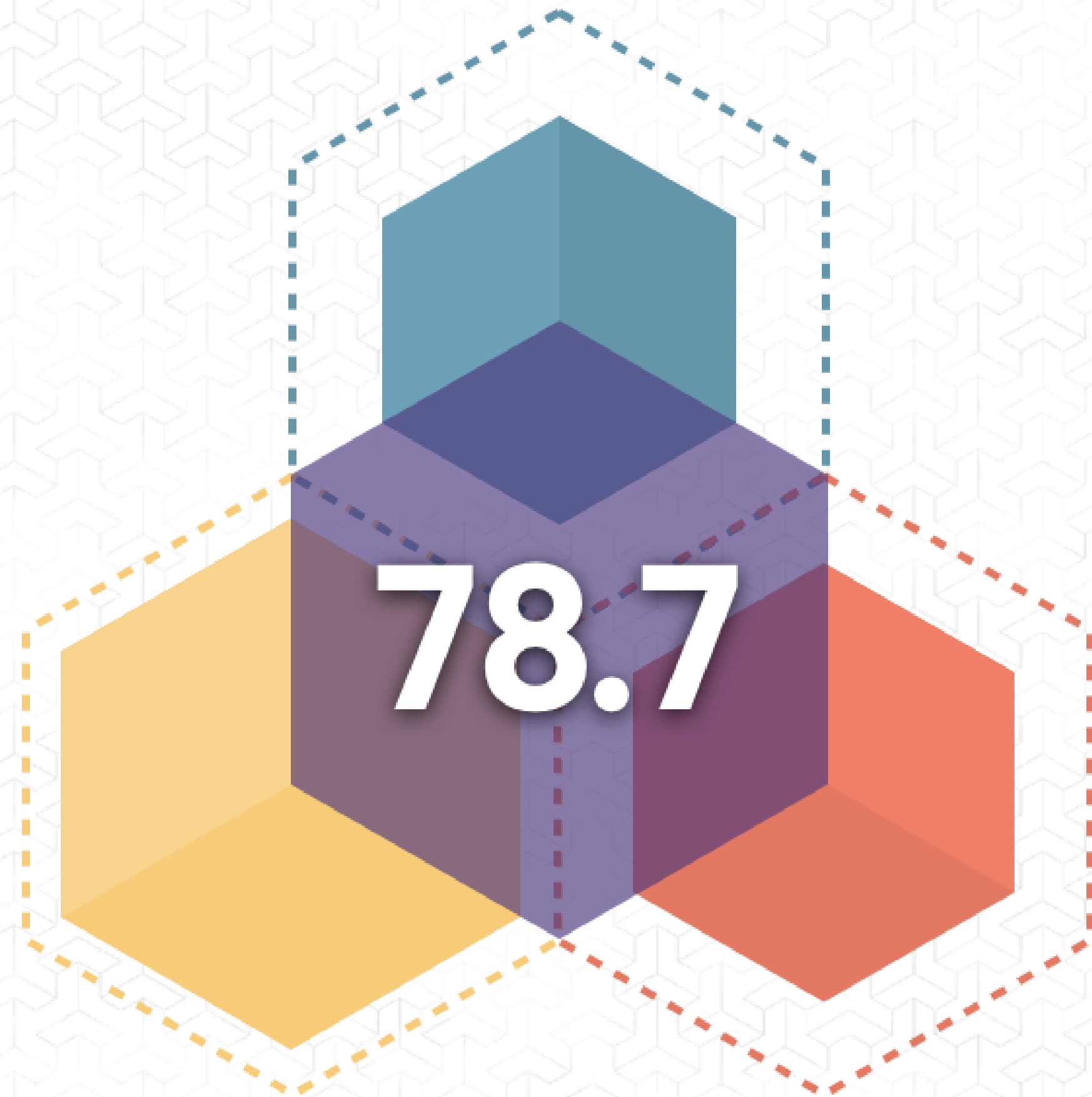
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Metrics with narrow distributions are hard to combine with metrics with wide distributions



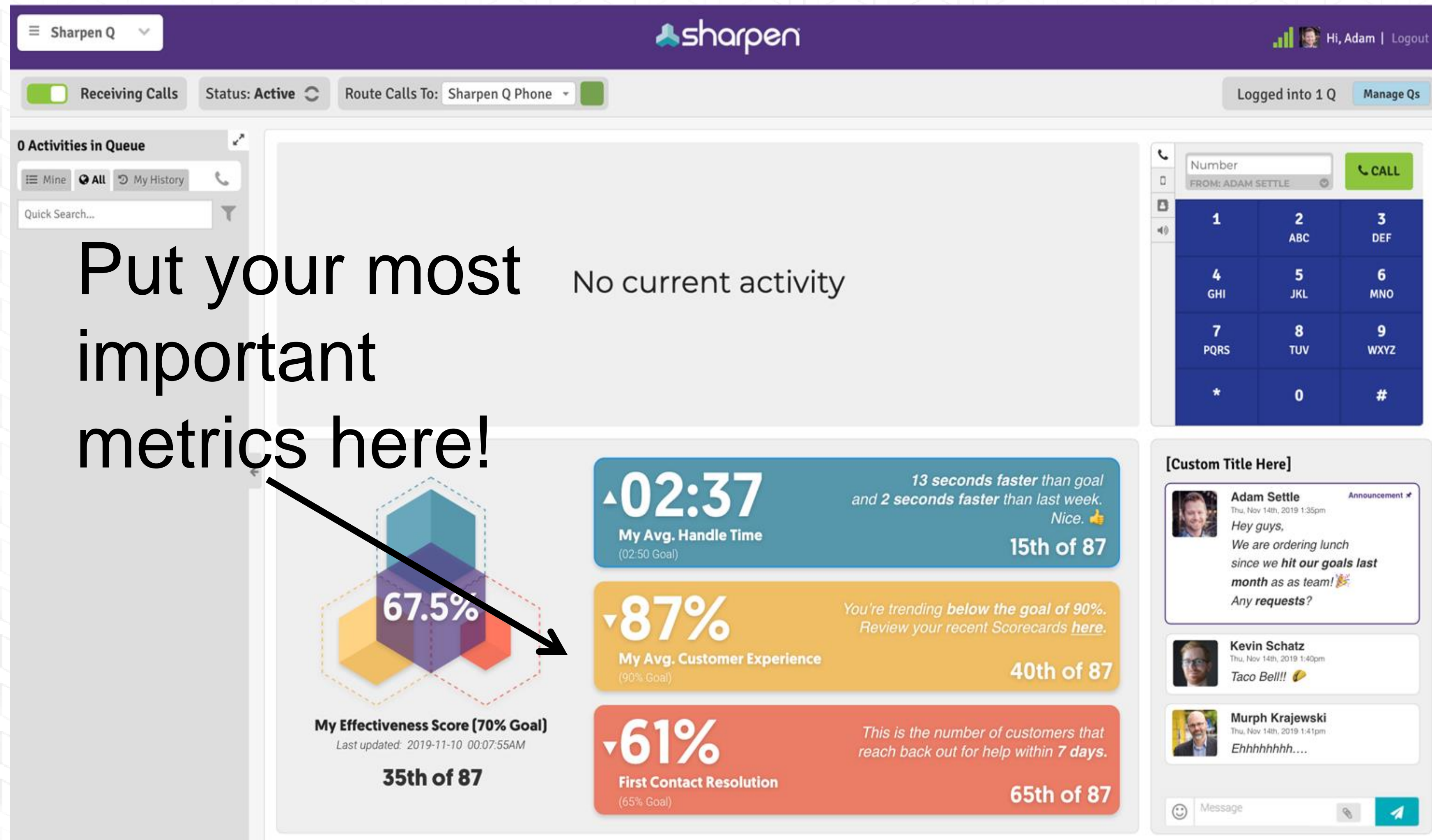
The concept is simple: How often is the agent...

1. Operating within standards?
2. Successful (make the sale, get good CustEx feedback, a good QA score)?

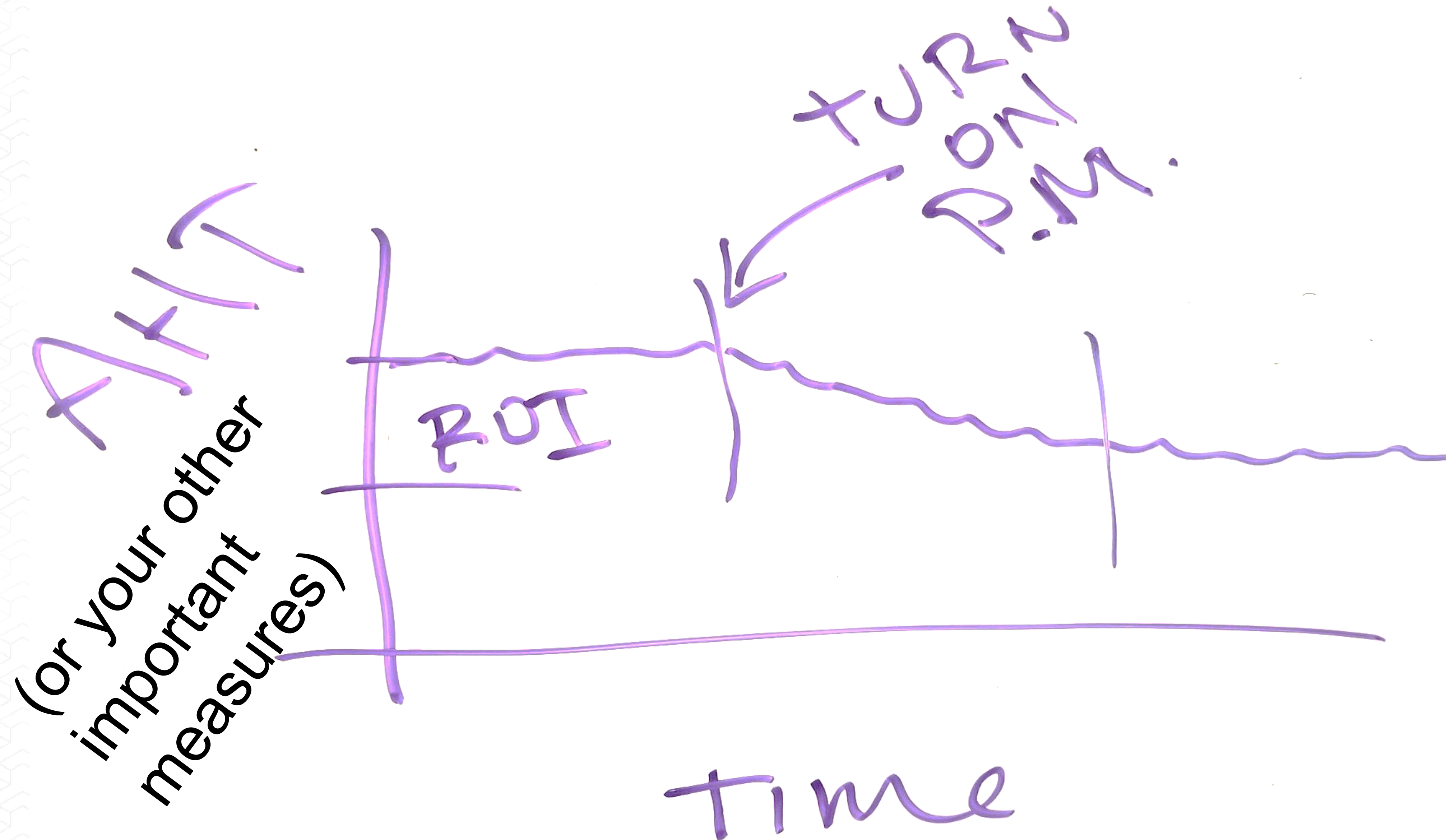


Agent Success Score

1. It differentiates between agents, it's an agent's percentage off perfect
2. It tells supervisors which specific contacts to coach to!
3. It tells an agent exactly what to do



What happens when you measure correctly? Significant ROI



And now a word from our sponsor...



Hey, Thanks!!

Questions?

Always free to reach out!

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April 21 – [Learn How to be Great - Helping Agents, Supervisors, and Execs Perform](#)