



Best-in-class call centers: Scorecards for success

How does your call center measure up? The first step toward delivering world-class customer service in today's environment is to separate the different components that contribute to a successful call center and evaluate your performance in each area. This series will focus on the Contact Center Model, which breaks the call center into its five key components - Strategy, Processes, Technology, Human Resources and Facilities. Each section will include a short scorecard to evaluate your current call center performance. If you are looking to improve the operations and performance of your call center, check out our entire selection of research-based products:



If you don't see the penguin, it's not Centerserve.

Module 2: Strategy

This tutorial continues our evaluation of the Contact Center Model and provides a scorecard for examining the first component, Strategy.

Context

The **Contact Center Model**, shown in Figure 1, illustrates the importance of strategy in the overall health and success of a call center. To learn more about the Contact Center Model, see [Module 1](#) of this tutorial series.

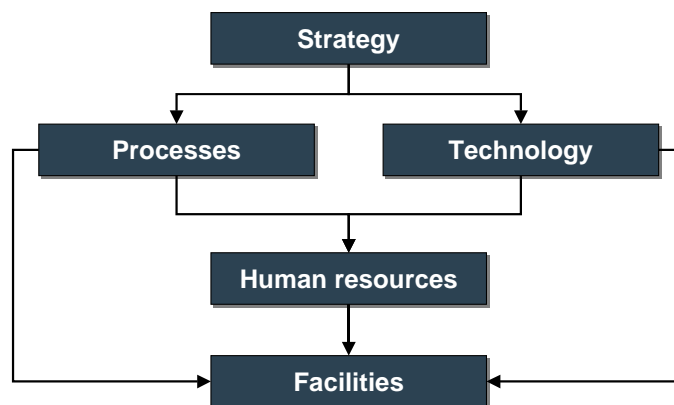


Figure 1 - Prosci's Contact Center Model

Strategy

Is your call center making the **best possible contribution** to the success of your organization? Evaluating call center strategy is **not** just for new centers. **All** call centers must continually reassess their business strategy to stay competitive in the marketplace.

Evaluate yourself on the following questions. All questions are on a 1 - 5 scale, with 5 being the highest score and 1 being the lowest score. For each statement, circle the appropriate score for your call center.

1. Our call center's **strategy** is defined and is **aligned** with our overall business strategy.

1 2 3 4 5

2. Our call center **vision** and **mission** are defined and well communicated to all call center employees.

1 2 3 4 5

3. The **needs** and **expectations** of our customers are understood and updated over time based on data from customers.

1 2 3 4 5

4. The **performance goals** and **objectives** of our call center are defined and clearly communicated.

1 2 3 4 5

5. Our overall contact center **strategy** is revisited and updated on a regular basis (at least yearly).

1 2 3 4 5

Total points you received out of 25 possible = _____

Total your score for this short assessment. This score will give you an overall indicator of the "health" of your call center strategy:

Score	Rating
21-25	Excellent
16-20	Good
11-15	Fair
6-10	Poor
5	Failing

Updating your call center strategy

Based on your score from the assessment above, you may find it necessary to reexamine and update your call center strategy. This section will focus on **how to update your center's strategy** to align with where your organization, industry and competition are headed in the future.

Reevaluate key elements of current strategy

The **key elements** fundamental to updating strategy in your call center include the following:

Strategy Element	Description
Mission statement	A mission statement succinctly identifies the end result of your efforts , and it functions as a "sanity check" to ensure that all work and planning support the vision. It provides employees at all levels with a quick reminder of what your organization is all about.
Know your customer	You cannot meet the needs of your customers if you do not know who they are. This may sound obvious, but a surprising number of contact centers do not have a good handle on their customers. You must understand exactly who your actual and target audiences are , their relationship with your organization, their likes, dislikes and expectations in order to deliver the highest level of customer service and retain them as customers. This information can become outdated in a short period of time, so you should frequently update the data .
Learn about the competition	Always keep an eye on your competition . Your customers have relationships with a variety of businesses and will likely compare their experiences with your contact center to every other customer service experience they have ever had. Just like your customers, this group is always changing and needs to be continually monitored.
Customer contact strategy	A customer contact strategy defines the desired customer experience and how the contact center fits with the organization's overall process of serving customers. It is a high-level description of the call center that can be read by anyone in the organization to learn about who you are, what you will be doing and how you relate to the operation as a whole.
Measures and goals	Define what success means to your organization. If you fail to do so, you won't know it when you get there. Establishing goals and assessing performance is an ongoing process that defines how well your center is doing over time .
Sourcing options	How you provide the people and technology to run your call center can be referred to as "sourcing" options. There may be very good reasons to choose another organization to provide or manage some elements of your call center.
Budget	Budgetary planning is crucial to help scope your call center project and make decisions and tradeoffs. How you choose to build your budget or utilize your current budget will influence your options for staffing, facilities and technology.

Summary

This tutorial focused on the important components of call center business strategy and how to reevaluate and update your center's strategy to align with where your organization is headed in the future.

The [Call Center Planning and Design Toolkit](#) contains a **Master Planning Guide** to lead you through the process of reassessing your strategy. It will help you identify the areas for improvement, and it gives you detailed steps on how to evaluate each identified area. The toolkit provides step-by-step instructions, templates and checklists for developing your own specific Contact Center Model - including your strategy, processes, technology, human resources and facilities. Key aspects of the [Call Center Planning and Design Toolkit](#) include:

- a comprehensive planning checklist and design guidelines for successfully setting up a new call center or redesigning your existing call center
- the approach and tools to help you create a contact center strategy and manage the implementation effectively

Find out more about the Planning and Design Toolkit by visiting the webpage, emailing callcenters@prosci.com or by calling 970-203-9332 to speak with an analyst.

Coming up...

The next tutorial in this series will provide a scorecard for evaluating processes in your call center.

Recommended resources:

This tutorial provided information from Prosci's [Call Center Planning and Design Toolkit](#). This toolkit can be used for starting or reengineering call center operations for improved performance. More information on this and other call center products can be found in our [Bookstore](#).

Call Center Planning and Design Toolkit	A comprehensive guide to call center strategy, planning and design ; an excellent resource for new contact center start-ups, existing call center improvement and future planning with detailed templates and planning roadmaps.
Best Practices Reports	Over 240 call centers from around the world share how they have improved service quality, productivity and customer satisfaction. This report shares lessons learned by call center managers regarding their most effective management practices .
Call Center Business Performance Packages	Find a call center package to meet your needs and save 20-25% off the list price.

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