



## 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:



### Module 3: Processes

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

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#### 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.

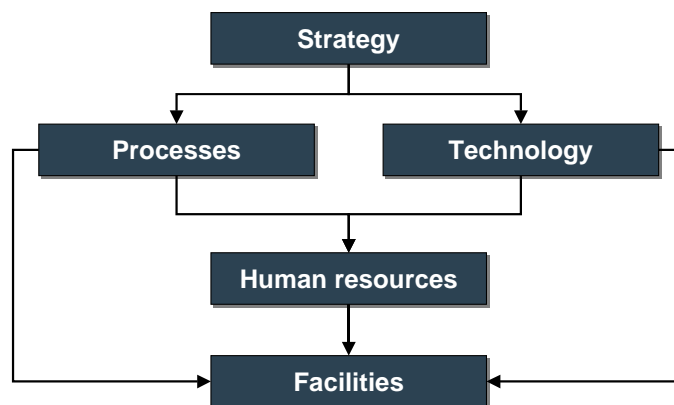


Figure 1 - Prosci's Contact Center Model

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## Processes

Without clear processes, customer contact would lack a clear path of resolution. The core of your call center operation are your business processes, including:

- **why and how** customers will contact you
- how your agents handle **customer interactions**
- how your call center handles **day-to-day business transactions and operations**
- how you manage your call center **staff and scheduling**

### Impact of call center strategy

Before you can take an in-depth look at your call center processes, you need to **understand the role** that the call center plays in the success of your organization. Your business strategy is the critical starting point for planning a call center, and a necessary prerequisite to optimizing the performance of your call center. To learn more about call center business strategy planning, see [Module 2](#) of this tutorial series.

**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 **business processes**, including hiring, training, quality monitoring, workforce management, performance management, systems maintenance and disaster recovery, are well-documented and up-to-date.

1 2 3 4 5

2. Our contact routing and **contact handling** processes are well-documented and up-to-date.

1 2 3 4 5

3. We have **performance measures** assigned to each business process and each customer contact process and data are collected and analyzed on a regular basis to indicate our current performance levels and trends. Continuous **process improvement** methods are in place.

1 2 3 4 5

4. We collect **customer satisfaction** data and benchmark our performance against competitors and non-competitors in order to set performance goals.

1 2 3 4 5

Total points you received out of 20 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
16-20	Excellent
12-15	Good
8-11	Fair
5-7	Poor
4	Failing

## Processes in the call center

Processes are abundant in all areas of the call center. The table below outlines the most common call centers processes:

Process Component	Description
<i>Contact types and volumes</i>	<p>The core data that affects all of your call center processes is <b>why and how</b> customers contact your center. You should have a solid understanding of the following information:</p> <ul style="list-style-type: none"> <li>• <b>Why</b> customers are contacting your center (order-taking, sales activities, billing, collections, technical support, etc.)</li> <li>• <b>How</b> customers are contacting your center (phone, email, web chat, fax, postal mail)</li> <li>• <b>How often</b> customer are contacting your center (contact volume)</li> </ul>
<i>Contact routing</i>	<p>Contact routing is the process of <b>getting the customer to an appropriate agent for assistance</b>. Centers should <b>customize</b> routing on business and customer needs.</p>
<i>Customer contact processes</i>	<p>Call centers should <b>detail how each type of contact will be handled</b> to ensure that your customers are handled effectively and efficiently.</p>
<i>Workforce management processes</i>	<p>To manage an efficient call center, it is critical to accurately <b>forecast the quantity of work</b> to be done and to schedule the right number of agents to complete the work. Overstaffing is bad for the budget and understaffing results in poor customer service and frustrated employees.</p>
<i>Productivity and performance reports</i>	<p>The best call centers have established <b>goals based on business needs</b> that everyone works toward. Reports provide managers with information on performance and productivity so they can see how individuals and groups are meeting those goals. Armed with this data, managers and supervisors can make decisions and run the call center more efficiently in the short and long term.</p>

<p><i>Quality monitoring program</i></p>	<p>Quality monitoring is the process of <b>observing an agent's interactions</b> with a customer (via telephone call, email, text chat, web call, fax) and providing feedback based upon predefined criteria of an evaluation form or scorecard.</p> <p>Every contact center needs a quality monitoring program to understand how it is performing. Scores indicate not only how an individual agent handles contacts, but also provide insights on the performance of other areas of the organization, such as training, technology, tools and processes.</p>
<p><i>Contact center policies</i></p>	<p>You must also design an <b>administrative framework</b> to ensure the smooth-functioning of your contact center that addresses:</p> <ul style="list-style-type: none"> <li>• the <b>policies</b> that your center follows</li> <li>• the <b>administrative procedures</b> you have in place</li> </ul>
<p><i>Internal and external communication</i></p>	<p>Communication must be considered at both internal and external levels:</p> <ul style="list-style-type: none"> <li>• <b>internal audiences</b> include call center team, management, IT, Human Resources and other relevant departments</li> <li>• <b>external audiences</b> include partners and suppliers, vendor support and of course, customers</li> </ul>
<p><i>Operations, administration and maintenance (OA&amp;M) plans</i></p>	<p>Call center technology is an essential part of the center's operations. This <b>technology needs constant care and attention</b> to assure ongoing service delivery. The OA&amp;M plan details:</p> <ul style="list-style-type: none"> <li>• who the user will contact and when for <b>system support</b></li> <li>• <b>who</b> will perform each OA&amp;M task and <b>how often</b></li> <li>• <b>escalation</b> and communication procedures for technical problem resolution</li> </ul>
<p><i>Disaster recovery planning</i></p>	<p>You must be prepared to handle customer contacts in the event of a <b>business disruption</b>. Examples of a business disruption can include weather events, natural disasters, fire, computer system crashes, illness, epidemic or labor strikes. It is essential to have on hand a <b>well-documented and up-to-date business continuity plan</b> so that everyone is aware of what to do when an event occurs.</p>

## How effective are your call center processes?

Think about the **process** from the table above that has the **greatest impact** on your call center operation. Then ask yourself the follow questions:

1. Is the process well-defined?
2. Is the process well-documented?
3. Is the process in-control?

If you answered "no" or "maybe" to any of the three questions, you need to take a deeper look at the process to determine how to make it as **effective** as possible. The [Call Center Planning and Design Toolkit](#) contains a **Master Planning Guide** to lead you through the process evaluation and redesign. This toolkit addresses call center processes with **checklists and guidelines** to make certain that all critical process elements are present.

The *2007 Call Center Best Practices Reports* from Centerserve will be released in March 2007 and contain an entire report dedicated to business processes in the call center. Email [questions@centerserve.com](mailto:questions@centerserve.com) for additional information.

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## Summary

This tutorial focused on the important components of call center business processes and how to determine if they are relevant and efficient for your organization.

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](mailto:callcenters@prosci.com) or by calling 970-203-9332 to speak with an analyst.

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## Coming up...

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

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**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](#).

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

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