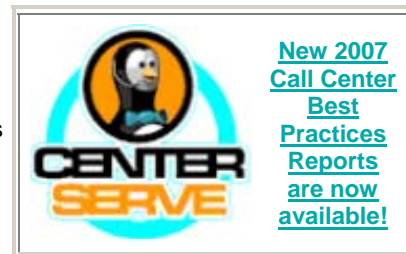




Best-in-class call centers: Scorecards for success

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.



Module 4: Technology

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

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.

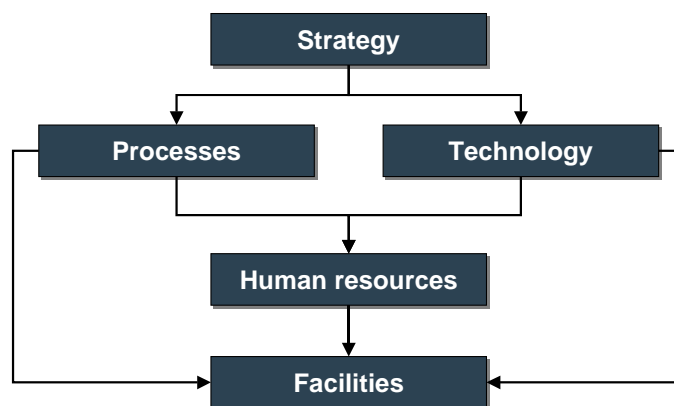


Figure 1 - Prosci's Contact Center Model

Technology

Technology will play a key role in the success of your call center. **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. We have a technology architecture plan for the 1 to 3 year timeframe, including a migration plan to VoIP.

1 2 3 4 5

2. Technology is used effectively throughout the call center to route customers to the right agents, to enable agents to access information easily and quickly, and to gather data on the performance of contact processes.

1 2 3 4 5

3. Our technology enables customers to choose their preferred media (voice, email, text chat, web, fax or mail) or self-service as a option for interacting with the call center.

1 2 3 4 5

4. Data is easy to extract from our systems and we make effective use of reporting tools to support our performance management processes.

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
17-20	Excellent
12-16	Good
8-11	Fair
5-7	Poor
4	Failing

Assessing your call center technology

Not all technologies are right for every call center; there are no "right" or "wrong" choices that fit all call centers. Still, with call center technology evolving so rapidly, it can be difficult to determine when to update or upgrade and when to stay with your current system. However, failing to implement the right technologies may be costing your call center money and impacting your ability to deliver great customer service.

The "right" technologies for your call center should be based on the following three criteria:

1. **Business objectives**

The technology choices made in your call center must align with achieving the "big picture" goals set by the company. For instance, if your call center or company goals include increased customer satisfaction, you should look at what technologies can help you improve that important metric. This factor also includes the budget.

2. **Competitive position and overall market performance in your industry area**

A good working knowledge of the types and levels of technology that your competitors use will give you insight into what your customers expect of you (see [Module 2](#) for more information on monitoring your competition). It is a good idea to set your goals at the same or higher level of technology than your main competitors. To be considered "best-in-class," call centers must be leaders in technology, with multi-media options for customers and new technologies to improve the call center's overall performance and efficiency.

3. **Customer needs and expectations**

Customers expect to **choose** how they interact with you. Your service must be by their standards and by the media of their choice. Make sure that you have a clear understanding of your customers' preferences and that your technology can support those needs and expectations.

If you need to do detailed planning, we recommend the [Call Center Planning and Design Toolkit](#).

Key elements of call center technology

The number of different call center technologies in use and available for use are many. In order to deliver a high-level description of these technologies, the table below presents four distinct technology elements:

Call Center Technology Element	Description
Voice	<p>Includes:</p> <ul style="list-style-type: none">• Telephone switch Should be sized to meet your operational requirements; examples include Key system, PBX system, standalone ACD system, communication server and VoIP.• Contact routing tools Allows callers to be routed to appropriate agents based on business rules or conditions; examples include basic ACD, call scripting modules or CTI applications.• Interactive Voice Response (IVR) Used by contact centers to provide self-service

	<p>options to reduce agent-handled call volume and as an advanced routing tool; also known as VRU).</p> <ul style="list-style-type: none"> • Speech recognition Used to replace touch-tone applications or to add new applications that were not possible with touch-tone entry.
<p style="text-align: center;">Data</p>	<p>Includes:</p> <ul style="list-style-type: none"> • Workstations The computer and operating system used to support an individual agent in customer contacts; often includes network and Web connections to access information and applications. • Computer applications and databases Software that performs the processes required by the user/organization; used to store and access customer data; provides interoperability and integration with other call center applications. • Customer relationship management (CRM) tools Used to mine customer data and optimize customer relationships to enable agents to utilize cross-sell and upsell opportunities; also allows agent to be knowledgeable about the customer's history during customer contact. • Knowledge management (KM) tools Enable rapid access to product information, problem-solving and trouble-shooting databases; can be integrated with contact management system to eliminate repeated data entry for searches and documentation. • Computer telephony integration (CTI) Enables screen pops of customers records during and throughout contact; allows reporting to track contacts through call center.
<p style="text-align: center;">Web</p>	<p>Includes:</p> <ul style="list-style-type: none"> • Web site Can offer the same or many of the services (24 x 7) offered by the call center in order to reduce contact volume to live agents. • Email Has become the most popular method of call center contact; can use automated email handling applications and intelligent routing techniques to get the email to the right agent. • Web integration (text chat, Web calls, collaboration) Integration of multiple forms of customer contact, including email, text chat, Web callbacks and click-to-talk applications to create fully-integrated contact channels; agents can also have the ability to co-browse the Web pages with customers and

	"push" Web pages to customers.
Management	<p>Includes:</p> <ul style="list-style-type: none"> • Reporting tools Provides access to performance data on all aspects of call center operations; can be integrated with switching equipment and communication servers. • Workforce management systems Automate the creation of work schedules and create staffing forecasts to match the projected workload. • Quality monitoring and logging systems Used to monitor agent calls for the purpose of quality assurance and quality improvement; advanced systems can record both voice and screen navigation.

Carefully consider if an update or upgrade to any of these technologies could help your call center achieve your business goals, remain competitive in the marketplace or meet your customers' needs and expectations. If you need to do detailed planning, we recommend the [Call Center Planning and Design Toolkit](#) for in-depth information on technology architecture planning and vendor selection guidelines.

Summary

This tutorial focused on important components of call center technology and how to determine if your current technology is appropriate for your organization.

The [Call Center Planning and Design Toolkit](#) contains a **Master Planning Guide** to lead you through the process of reassessing your call center performance and 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 human resources 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.
2007 Best Practices Reports	Over 250 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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