



## How to determine what to measure in your call center

The Call Center Learning Center is excited to announce a new "how to" tutorial series for call center managers and supervisors. This tutorial series will pull from Prosci's research-based toolkits and best practices reports. This module provides guidelines on how to determine what to measure in your call center. Module 2 will address how to minimize misdirected contacts to your center. Module 3 will focus on how to increase the percentage of calls resolved in one contact. Module 4 will help you learn how to give effective feedback from quality monitoring. Module 5 will conclude the series with how to determine selection criteria for a technology vendor.

### Setting contact center goals for success

The best contact centers have **established goals** based on business needs that everyone works towards. Goals help you determine what success means to your organization - otherwise you won't know it when you get there. Is it happy customers? Lots of sales? First contact resolution?

Establishing goals and assessing performance is an ongoing process that **defines how well the center is doing over time**. Exactly what gets measured varies from center to center. It's based on those big-picture objectives identified in your call center's strategy.

Setting goals and measures, creating associated reports, and analyzing data are all things that take time and money that you can't afford to waste. The following guidelines will help you select the **most important areas to measure**.

### Establishing appropriate measures and goals for your environment

When determining call center measurements and goals, you must always keep in mind **three important concepts**:

1. What do my customers need?
2. What are the business needs?
3. How do we stay competitive in the industry?

Figure 1 illustrates how to determine what measures to use based on what is most important to your call center.

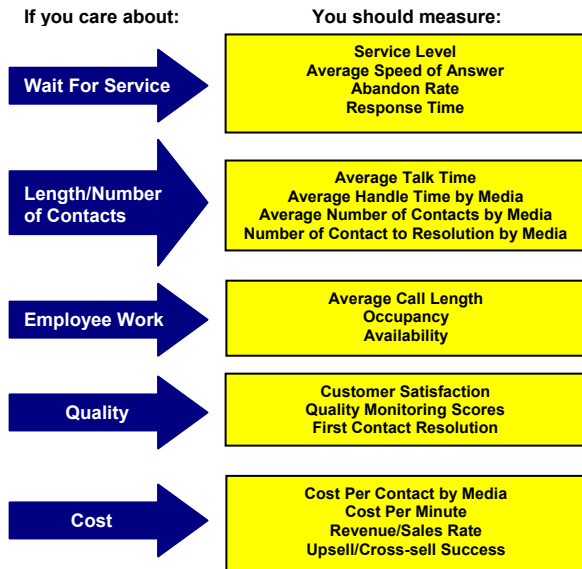


Figure 2 – Determining what to measure in your call center

### KPI categories and goals

Upon determining the appropriate measures for your center's priorities, you should identify at least one or two key performance indicators (KPIs) in each of the following areas:

- **Operational efficiency**  
(focused on operational costs)
- **Operational productivity**  
(if applicable, focused on revenue generation)
- **Service quality and customer satisfaction**  
(focused on customers' experience)
- **Employee satisfaction**  
(focused on your most important resources)

Consider the following questions when setting specific goals for your call center's performance:

#### Contact length and channel (operational efficiency)

- How long do calls last (handle time)?
- How long does it take to compose an email response? Fax? Text chat?
- Will customer service suffer if short contact lengths are targeted?
- Can redistribute voice contact to lower cost media (for example, IVR)?

### Revenue generation (operational productivity)

- What is the goal for the take rate (percent of contacts resulting in sales or revenue generation)?
- What is the overall revenue goal?
- What products and services are targeted for upsell and cross-sell?
- What is the number of outbound contacts expected per agent per day?

### Customer contact issues (service quality)

- What will be the definition of a quality contact?
- What customer satisfaction goals will be targeted and how will they be measured?
- Will customer satisfaction goals conflict with other targets, such as average handle time?
- When will a contact be considered resolved?
- What is the best metric for quality monitoring to assess overall service quality?

### Employee work issues (employee satisfaction)

- How do we define employee satisfaction?
- What non-contact activities will be supported by the center (e.g., training, project work)?
- What occupancy rate is targeted to balance efficiency and employee satisfaction?
- What is the overall turnover objective for the center?

### Next steps

After you have selected the appropriate performance measures for your center, set performance targets based on your customer and benchmarking data. Once the measures are in place, periodically **revisit and refine** them to ensure they are **realistic** and **driving the right behavior**. An effective performance measurement system is an ongoing process that identifies successful performance as well as areas for improvement.

A valuable resource to help you improve performance measures is the [Call Center Measurement Toolkit](#). It provides a complete, alphabetized guide to performance measurement that is easy to understand and easy to implement. Each measurement area includes complete definitions, common mis-uses of terms, how to compute each measurement area for your call center, goal setting tips and recommendations for improving performance in the each area.

The [Call Center Best Practices Report - Operations Edition](#) provides benchmarks of 10 key performance measures based on data collected from 240 companies. The benchmarking data will help you see how your call center's goals and performance measure up against other call centers in your industry.

### Resource guide

#### Benchmarking Reports and Management Toolkits

##### [Call Center Measurement Toolkit](#)

How to measure and improve call center performance; an excellent guide to developing a performance measurement system with concrete recommendations for improving call center performance. After you determine what to measure in your call center, this toolkit will help you to accurately capture those measurements.

##### [Call Center Best Practices - Operations Edition](#)

Benchmarking report - 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. It includes industry benchmarking data for 10 key performance measures.

##### [Call Center Measurement Package](#)

Save 20%! Includes Call Center Measurement Toolkit and Call Center Best Practices - Operation Edition.

##### [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. It includes detailed information on translating your customer contact strategy into performance goals and establishing reporting and data analysis processes.