

Top 5 Obstacles to Reviewing Performance in the Call Center

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Metrics, reports, and dashboards. Nowhere in an organization is the mania for measurement so pronounced as the modern call center. And yet with all of this measurement, why is it that so many call center managers privately admit that overall performance hasn't really improved?

Partly, the answer lies in what organizations are measuring. As I described in more detail in the Nov 2005 issue of Contact Professional (link to the article), too often call centers develop activity metrics like *number of calls per day* and *average length of call*, rather than outcome metrics like *% calls redirected to self-service* and *% of customer who rate "highly satisfied"*. Unified contact centers must change their focus from emphasizing efficiency (doing work in the right way) to considering effectiveness (doing the right work).

But even those organizations that choose appropriate metrics often make potentially damaging mistakes when reporting on and reviewing their performance. Surprisingly, the culprit is often the weekly meeting itself. Issues arise in preparing for the meeting, during the meeting itself, and in disseminating decisions made after the meeting. In our experience, the top 5 obstacles to reviewing performance in the call center are as follows:

1. There is too much human intervention required

Virtually all meetings use MS PowerPoint or Word to document performance in "briefing books". People run reports, export data, merge it with other data sources, and add color commentary to explain results/trends. One of our clients was shocked to discover that his analysts were spending nearly two full days to get ready for their weekly operational review. Moreover, given the manual nature of the tasks, the likelihood of unintentional error is high.

2. Information is inconsistent from one group to another

A call center director with six managers will likely get performance reports in six different formats. Even if the director dictates a standard, people will interpret outcomes differently. These variations can range from different definitions of the metrics being used (should *average delay of all callers* include those that hang up during their wait?) to different expectations of progress (when is a new hire considered trained?) to different interpretations of outcomes (is a satisfied customer one that doesn't call back with a problem or one that buys more?).

3. Performance cannot be certified

Once data is removed from a system, there's no way to track whether any changes have been made to it and therefore it is subject to misrepresentation. This might be as benign as an unintentional omission or as malicious as outright gaming of the results. As a result, meeting time is often spent arguing about the accuracy of the presentation rather than making decisions and any decisions that are made might be based on faulty assumptions. In our experience, senior management often doesn't believe the numbers that they see reported from a call center.

4. Information becomes stale very quickly

Operational review meetings are a live discussion of performance. Unfortunately, briefing books are static, based on performance at some specific point in the past. If a question comes up during the meeting or if someone wants to "pearl dive" into more detail on a specific topic, there is no way to immediately check the operational systems to see what might have changed in the interim. While it's interesting to know that *staff occupancy* was below target last week, it's critical to know whether it's improved since then so we can decide what adjustments have to be made for the coming week.

5. Decisions are often not communicated to those that are impacted

Obviously, the purpose of operational review meetings is more than just to review; rather it is to make decisions that incrementally improve performance. Unfortunately, the classic PowerPoint briefing book has no way of disseminating the decisions made, to assign and track action items, and to keep track of progress during the period before the next meeting. Without this background rationale, other stakeholders that are critical to the call center's success – marketing, finance, and operations – can be suspicious of the conclusions and may delay implementation of critical change.

While these issues with operational reviews may seem overwhelming, technology exists that streamlines the process of capturing, consolidating and presenting authoritative, verifiable information on performance. These solutions can greatly simplify and add structure to the process of reviewing performance, allowing the call center manager to get back to his/her real job – creating a world class unified contact center.

As Pilot Software's chief executive officer (CEO) and president, Jonathan Becher is chartered with providing the overall strategic direction of the company. Leveraging his extensive operational expertise, Becher leads the company's own internal performance management deployment and spearheads bringing Pilot's award-winning and patent-pending performance management solutions to the market. He is a frequent speaker at industry conferences, an active member of the performance management community, and a widely published author, including a popular performance management blog (<http://alignment.wordpress.com>). Jonathan can be reached for feedback at ceo@pilotsoftware.com.