



# The US Contact Center Operational Review

## EXECUTIVE SUMMARY

1<sup>st</sup> edition – 2007

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## Executive Summary

The US Contact Center Operational Review (1<sup>st</sup> edition - 2007) is a study of the performance, operations, technology and HR aspects of 204 US contact center operations. Taking a random sample of the industry, a detailed structured questionnaire was asked to contact center managers and directors between March and May 2007. Analysis of the results was carried out May to July 2007. The result is the 1<sup>st</sup> edition of the largest and most comprehensive study of all aspects of the US contact center industry.

ContactBabel is very grateful to the support which it has received from all of the sponsors of the report. However, complete editorial independence has been insisted upon and given at all stages, and readers can be confident about the objectivity of the report's findings.

### How to use the report

The body of the overall US Contact Center Operational Review is divided into seventeen separate chapters, each dealing with an aspect of the contact center industry. A small extract from each chapter is contained in this Executive Summary:

- Recruitment and Salaries
- Attrition and Absence
- Training
- Flexible Working
- Outsourcing
- Security and Disaster Recovery
- Headsets
- CRM
- Contact Center Performance
- IP and Call Handling
- Quality and Customer Satisfaction
- Hosted and On-Demand Solutions
- Information and Planning
- Outbound and Call Blending
- Speech Technology
- Multimedia
- Contact Center Strategy

Each section contains analysis of the data, including a comprehensive statistical analysis in graphical and tabular form. The report also contains a Supplier Directory, of organizations which provide services, products and solutions to the US contact center industry, divided by discrete category.

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## Recruitment and Salaries

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New agents within the TMT (technology, media and telecoms), services and healthcare sectors will tend to receive significantly more than the \$28,000 mean average across the US. Those in the outsourcing sector are most likely to have a shortfall in salary, with such agents being paid a mean of only 73% of the national average wage for new agents.

After 6-12 months' experience, many contact centers provide a salary uplift to their agents, who at that time will have proved themselves reliable and knowledgeable enough to be adding to the contact center's knowledge pool, rather than requiring more of the expense of intensive training. As such, an experienced agent can expect an average salary increase of around \$6,000, or 22% of their initial starting salary.

Team leaders are paid an average of \$8,796 (26%) more than experienced agents, which does not seem overly-generous considering the extra roles and responsibilities they undertake.

Contact center managers are paid an average of \$20,000 more than team leaders. Those in TMT and the finance sector are paid best (being a manager in a finance contact center seems to be relatively much more lucrative than being an agent within that sector). Outsourcing contact center managers within this survey are paid on average less than \$50,000.

The most popular forms of recruitment method are face-to-face interviews, telephone interviews, standard application forms and the taking up for references from past employers. Only around half of contact centers use a recruitment agency, and a minority use resumes, assessment centers or psychometric testing to help the recruitment process.

There is a very definite split between how directly the company interacts with the candidate and how successful the recruitment method is.

Those that keep the candidate at arm's length – through standard application forms, psychometric tests, resumes and references – have a lower success score, with the first two methods also having the highest number of respondents saying that they were very unsuccessful. Studies have shown that half of applicants admit to stretching the truth on their resumes, and 10% lie outright.

However, 12% of respondents using psychometric testing did report high levels of success through this method, suggesting that some businesses are using psychometric tests effectively, while others are not.



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## Attrition and Absence

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Conventional wisdom says that attrition rates are sky-high in the US contact center industry, running at upwards of 40-50% typically. In fact, there are relatively few contact centers that consistently churn staff at these sorts of rate, but as these are the ones that are usually highlighted in the media or by solution providers, there is a common misconception that these are typical.

ContactBabel's figure for mean average staff turnover is 33%, which is considerable, but the median (midpoint of all respondents' answers) was significantly less, at 27%. This shows that there are a number of contact centers with very high attrition rates which are pulling the mean average upwards.

There was no real agreement amongst our respondents on the main reasons for staff attrition. Remuneration was seen by the highest proportion of contact centers as being a major issue, with 22% reporting it as a major cause of attrition. The repetitive nature of some contact center work and high levels of stress arising from aggressive management techniques were also cited by a significant proportion of respondents. In the former case, an increased use of self-service would seem to be a solution. Interestingly, in an industry which outsiders often deem as a dead-end job, the lack of opportunity to move up the career ladder is marked on average as being the greatest cause of staff attrition.

Perhaps most concerning about these figures is the fact that although most contact centers admit that attrition is a problem for them, there is no agreement on why staff are leaving in such numbers. As such, how is it possible for the industry to address this issue in a coherent and effective fashion?

Absence has many reasons – a poor working environment, workplace bullying, an unoptimized schedule which makes impossible demands on staff, lack of leadership, low morale, repetitive and mundane tasks - the list goes on. Staff absence is a vicious circle, each part of which feeds into another, usually leading to higher attrition rates, greater costs and poor service.

As is often the case, it is the outsourcing sector which has the highest levels of HR issues to manage, whether attrition or absence, although most contact centers report a cumulative absence rate of between 10% and 14%. Healthcare's short-term absence rate is noticeably lower than any other sectors', although it has the largest proportion of long-term absences.

## Training

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With agent attrition rising, and the need to improve customer satisfaction coming even more to the fore, agent training has become a high profile issue within the industry. As the types of role that contact center agents perform continue to grow in complexity, ongoing training will be required that goes beyond simple call handling and top-line product information. There is an increasing trend towards cross-selling and up-selling, which requires agents to switch between very different skill-sets at a moment's notice.

The typical contact center induction course lasts for around 3-4 weeks on average, with large contact centers tending to have longer induction courses. There is a large difference shown across vertical markets, based on the type of work that the agents are expected to do.

Once an agent comes out of the induction course, their team leader or supervisor should take over the day-to-day development of the agent, supported by regular and targeted formal training courses (whether internal or external), and possibly computer-based training sessions as well. Agents will tend to receive around two weeks of training each year (excluding the induction course). Those in the outsourcing and TMT sectors get the most, as the latter often have complex new products and services to understand, and the outsourcers will have to train agents separately for each campaign or client.

Many people say that team leaders are the most important people within the contact center, as they are what makes the difference between good and mediocre agents. Yet many team leaders are promoted out of the agent role at which they were good, without being fully taught the skills of management or coaching.

On average, an agent can expect to receive less than two hours of coaching per week from their supervisor / team leader, equating to around two-thirds of the team leaders' time spent in coaching, which is generally quite good. TMT and finance team leaders are said to spend most of their time in coaching – which we believe should be the main role of team leaders – whereas respondents from the insurance sector state that a team leader will average of 17 minutes coaching per agent each day.

A rather disappointing 40% of respondents offer their staff a chance to gain contact center-related qualifications, whether at agent or managerial level. There are polarized views on this across the industry: some believe that externally-recognized qualifications will just encourage agents to leave sooner, whereas others see it as an investment in the agent, and proof to the agent that the business values them.



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## Flexible Working

Although many contact centers still operate in the same way in which most were originally set-up – a single, centralized site – there are increasing pressures within the industry to look at alternative ways of working, such as using virtual contact centers, or encouraging homeworking.

Although 44% of respondents were single-site entities, the mean average number of US contact center operations was 3.8. Outsourcers would tend to have the highest number of domestic sites, with those in the transport & travel sector also tending to have significant numbers of contact centers.

Of the 56% of respondents who indicated that they had more than one US contact center location, 63% of these respondents linked them together to benefit from economies of scale and other virtual contact center benefits.

Respondents with virtual contact centers were generally very pleased with the gains in efficiency and service level that they have experienced. The ability to smooth out call spikes by moving them between contact centers, and the reduced wait times were particularly mentioned, although all of the potential virtual contact center benefits mentioned were rated positively.

Of the 37% of multiple-site respondents who had not virtualized the operation, a failure to visualize the commercial benefits of doing so was stated to be the main reason for non-virtualization. A significant number of businesses also had serious concerns about expense: as with any investment, the cost is guaranteed but the savings are not.

Few of our respondents use much in the way of homeworking agents, with only 3.2% of agents in this year's survey being based in their own homes, although this is significantly higher than the sub-1% figure found in the UK. Having said that, 22% of operations surveyed had some use of homeworking, which is far in excess of the UK's figure. However, even in these enterprises most agents are still based in a typical contact center. Those in the transport & travel and outsourcing sectors had the most homeworkers, and finance (where security is paramount) had the fewest.

More than half of respondents believe that homeworking is on the way up, with none believing that it will decrease.

Interestingly, amongst those using some homeworking now, 91% said that they would be using more. Of those which have not yet trialed homeworking, only 43% said that they believed homeworking would increase.

## Outsourcing

A judicious use of outsourcing can assist a contact center with its operational and strategic goals:

- hitting performance targets (through helping with call spikes)
- providing a better customer service (through offering an out-of-hours service)
- quickly ramping up to assist with outbound sales campaigns
- measuring customer satisfaction with regular outbound surveys.

Outsourcing allows businesses to focus on their core business, and to benefit from the experience and knowledge of specialist contact center operators. It is a sector which has been hit in recent years by the increase in outbound legislation and the competition from offshore, but which still accounts for over 10% of US agent positions.

The use of outsourcers' services vary greatly between vertical markets, with the transport & travel sectors being the most likely to use outsourcers' particular skills, especially overflow and out-of-hours. 55% of respondents used outsourcers in some way.

The use of a third-party to survey customer satisfaction is a strong trend which is likely to become even more popular as the needs to improve customer satisfaction continues to strengthen its position as the no.1 priority for contact centers.

A significant number of respondents also use outsourcers on an ongoing basis to provide customer service, whether scheduled, or as overflow, thus working in a more long-term way with the outsourcer. However, most of our respondents did not outsource all of such work. Some businesses which provide long opening hours do so through the use of a third-party, as their customers expect 24/7 service, but it may not be economical to provide this in-house, especially in smaller operations.

Although a contact center agent can be trained to operate a keyboard more quickly, or even modify their behavior to be more empathetic, it is impossible to teach them a new language quickly and cost-effectively. Forcing a customer to speak in a language that is not their first choice will hardly provide high levels of customer satisfaction, and is also prone to error and misunderstandings.

As such, especially in a multilingual country like the United States, businesses have the need - if not always the in-house capability - to provide multilingual resources, and one way to do this is through outsourcing.

As we would expect, Spanish is the most needed non-English language, with 73% of respondents requiring some agent capability in Spanish (there are 40 million Spanish speakers in the US). Perhaps more surprisingly, 20% of respondents believe they needed French language skills, perhaps to take calls from Québécois. A smaller proportion also needed Chinese, Italian, Korean, German and Portuguese, a true sign of America's high international population.



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## Security and Disaster Recovery

There have been numerous recent media reports of fraud within the contact center industry, both in domestic and offshore operations, with customer data and payment information being extracted from the contact center by gangs acting through contact center workers.

While a certain amount of fraud is almost inevitable in business, and the vast majority of contact center staff are honest, the contact center industry has once again come under the spotlight for its security practices, which in most cases seem to be sound.

4 in 5 respondents were confident that in case of a disaster preventing their contact center from operating, their company had contingency plans. As expected, the finance sector leads the way, with all respondents reporting disaster recovery plans as ready, which those in the transport & travel sectors were also able to boast.

Around half of respondents employ a professional disaster recovery firm to hold their back-up data, with 31% using another part of the parent company, and 22% going for the belt-and-braces approach of using both.

Although the majority of respondents feel that their data is held securely in case of disaster, substantially fewer have the ability to employ alternative agents in case of the worst. Of our respondents, less than half said that they could bring alternative agents online as needed.

Around 43% of respondents claim to be operating a clean desk policy, with those in transport & travel, finance, outsourcing and insurance being most likely to say that they were.

## Headsets

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There are various factors to consider when deciding which headset to purchase for your contact center workforce. If you have many hundreds or even thousands of agents, headset purchase can be a large ongoing capital expenditure that is important to get right. There are many things to consider:

- Compliance with health and safety legislation
- Total cost of ownership
- Durability
- Performance
- Comfort
- Contact center telephony infrastructure
- Sound quality

Contact center agents wear headsets for hours on end every day, and the cost of replacing or repairing headsets should be considered in the total cost of ownership, requiring good levels of after-sales support and guarantees.

Around 31% of respondents' headsets are replaced in a given year, meaning that the average headset will have a useful life of just over 3 years.

Only 5% of headsets were stated to be wireless, with most of these headsets belonging to supervisors who are more likely to have to be mobile to help agents in their team. Respondents expect that within 2 years, 25% of headsets in their contact center will be wireless.

Currently, some 20% of respondents' headsets are able to cope in an IP environment, with respondents expecting this figure to be closer to 50% in 2 years' time.

Only 6% of respondents' contact centers have a definite, written policy on acoustic shock and avoidance thereof, a figure six times lower than the UK contact center industry, and a clear area for improvement. 'Acoustic shock' is a phrase coined to describe a sudden, unexpected noise, often delivered at a very intense frequency. It may be caused by feedback from telephone equipment, faulty telephone lines, non-compliant switchboards and headsets. The CCMA ([www.ccma.org.uk](http://www.ccma.org.uk)) claims that "tens of millions of pounds" have been spent in the UK alone on settlements related to acoustic shock.



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## CRM

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At a claimed penetration rate of 63%, CRM seems to be a very popular solution in the contact center, seemingly being present in more operations than even IVR. However, this may be a matter of definition.

58% of respondents bought their CRM system from a third-party, compared to 42% who developed it in-house. The expense of in-house development can be guessed at by looking at the 80% of respondents in small contact centers which bought their CRM solution from a third-party. These solutions will, in the main, be very different in functionality and capability from the 33% of third-party systems present in large contact centers.

Cross-selling and up-selling can happen on both inbound and outbound calls, but the importance of selling off the back of an inbound service call is greatly increasing, as legislation against outbound calling becomes tighter in most countries. Added to this is the stated aim of many businesses to move their contact centers away from a being a service-based cost center to becoming a sales-focused profit center: cross-selling and up-selling are becoming major ways to get the contact center to pay for itself.

Currently, respondents indicate that half of their agents are able to cross-sell or up-sell within a call, with those in the healthcare and transport & travel sectors seeming particularly adept. Surprisingly, only 32% of respondents' agents in the sales-driven world of retail & distribution were able to cross-sell or up-sell. There was little significant difference seen across contact center size bands, with 45% of agents in small contact centers and 55% in large contact centers being able to cross-sell or up-sell.

However, there are some inhibitors to increasing cross-selling / upselling ability. Generally speaking, there are worries that agents simply do not have the confidence or capabilities to move seamlessly from service to sales, with those in the insurance industry (where there are numerous complex and highly-regulated products) being particularly wary of this.

37% of respondents state that they are already under pressure to reduce call lengths so as to manage queue times, and that attempting more cross-selling and up-selling would exacerbate matters. In these cases, the wider business should be taking a more strategic look at the purpose of the contact center and measure the cost-benefit equation associated with investing more in systems and people in order to reduce the missed revenues that are currently happening.

## Contact Center Performance

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The success or otherwise of contact centers has traditionally been measured by observation of key metrics, usually related to cost and efficiency – average call length, average speed to answer, % of calls answered within a certain time, etc.

While these figures are a useful and still widely-acknowledged and understood benchmark, times are changing, albeit slowly. Many contact centers now try to measure the effectiveness of their operation by tracking metrics such as first-time call resolution and customer satisfaction levels, although there are no standard measures or agreements on what constitutes a satisfied customer or fully-resolved call. This does tend to strengthen the hand of those who believe that because the contact center **can** provide such detailed data on call volumes and handling times, then that is what it **should** primarily be measured against.

Respondents' agents spend an average of just over 61% of their time on calls, with around 15% and 10% of time spent respectively on each of wrap-up and administration. Idle time accounts for over 8 minutes in the hour, however, there are clear variations in call handling capability from one market sector to another.

Although speed to answer is another of those traditional statistics which has always been measured, there is a strong case for keeping it at the forefront of how contact centers measure their success. Speed to answer plays a vital part in improving the customer experience, and also feeds into other performance measures such as call abandonment rate.

Currently, the mean average ASA is 42 seconds. One-quarter of respondents answer the phone within 10 seconds on average, although 15% take over one minute. 72% of contact centers have an ASA under the mean of 42 seconds, with the median being 22 seconds.

The ability to understand a query and deal with it in a reasonable timeframe at the first time of asking is the key to a contact center's success, reducing the overall number of calls while providing the customer with a good experience which will impact on the company's overall performance. It also has a positive effect on the agent's morale (and thus, staff attrition rates), and increases the chances of a successful cross-sell and upsell being made.

Overall, the mean average figure for first-call resolution is running at 72.8%, similar to the UK. As some respondents have a very poor first-call resolution rate, this can drag the average down, so it is important to understand that the median (midpoint) average is 80%.

## IP and Call Handling

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The figures from this year's survey point to the use of IP within the contact center as being very much a thing of the here-and-now, rather than another possibility for the future. Despite the relatively slow start to IP implementation, these statistics point towards IP being an integral, definite and strategic part of the contact center industry's future.

The mantra "evolution, not revolution" has been pushed by telephony vendors, encouraging contact centers to consider the option of moving at their own pace towards IP, and this is what has happened in recent years. However, there is a significant proportion of respondents (14%) using pure IP within their contact centers.

Of those 48% of contact center respondents which are not using any form of IP at the moment, 35% expect to be using IP in some form within 2 years. These figures show that IP is making its way further into the mainstream and is figuring in the thinking of many businesses' contact center strategies.

Regardless of the geography or timing of IP surveys, reducing network costs has consistently been seen as one of the most important reasons for implementing IP, with almost two-thirds of our respondents rating it as very important. Having greater flexibility to add and change agents is also very important, as is the need to replace ACDs/PBXs which may have been bought to counter the Y2K problem, and which are now coming to the end of their useful life. Half of respondents believe that enabling new multimedia channels, such as video, is a key driver for IP decisions.

It is interesting to see that the second most important reason for implementing IP is that there has been a corporate decision to move all telephony onto an IP infrastructure, especially in medium and large contact centers, which are more likely to be part of a network of operations, as well as belonging to a large company which has massive internal corporate telephony needs that could benefit from IP telephony.

The effects that pure IP implementation has actually had (rather than the perceptions of what it could do) revolve around inter-site cost reduction, and also the flexibility to add and change agents quickly, enabling homeworking and the virtual contact center model. This latter point is very interesting when comparing the expectations with reality: although those that implemented pure IP solutions did not do so with increasing agent flexibility in mind, the reality is that they have strongly benefited from this capability.



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## Quality and Customer Satisfaction

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Witness Actionable Solutions

For the past four or five years, there has been increasing desire within contact centers to improve upon customer satisfaction and experience, in order to keep customers loyal and profitable for longer. Recent ContactBabel studies have shown that increasing customer satisfaction is consistently the no.1 focus of UK contact centers, outperforming other key areas such as decreasing costs or increasing sales, but it ranks as no.3 in the US, behind achieving specific call metrics and reducing costs.

Although comparing absolute customer satisfaction ratings between companies is a pointless exercise – as all companies measure different things in different ways – it is interesting to look at the proportion of customers who give the companies a maximum score (whether it is “10 out of 10”, “excellent”, etc. – however the company phrases it).

Respondents state that a mean average of 67% of their customers give a maximum customer satisfaction rating, with the median (midpoint average) being 77%, meaning that there are a number of respondents who are impressing very few of their customers.

Unlike the UK, where the stated desire to improve customer satisfaction is paramount, US respondents are pragmatic in their assessments of what they most need to do. Pressure from outside the contact center is creating a situation where respondents are motivated primarily by trying to achieve set metrics (such as call handling times, speed to answer and call abandonment rates), and to reduce their costs further. Rather disappointingly, improving first-call resolution rates was voted the least pressing issue, with less than half of respondents rating it as important.

Contact centers in insurance, finance and outsourcing use the most quality assurance methods, with listening-in by a supervisor or manager being used in the majority of all contact centers. Call recording is also used by most, and is especially popular in finance, insurance, outsourcing and retail & distribution operations (the first two of which may need to use recording for regulatory compliance).

Customer surveys are also growing in importance, with the majority of contact centers using some form of customer satisfaction survey. Scripting – making sure agents follow the correct procedures – is popular with outsourcers (thus reducing training times and exactly following client requirements), insurance, finance and retail & distribution companies, especially in outbound situations.

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## Hosted and On-Demand Solutions

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Hosted or on-demand solutions can mean anything from network-based routing, to the complete outsourcing of a contact center's operations. The types of business and/or contact center that should be most interested in learning more about hosted solutions include:

- ❖ Small and medium business, especially those needing rapidly deployable, easy-to-use services, such as enhanced routing
- ❖ Enterprises that would like to voice enable their web applications to achieve unified self-service
- ❖ Enterprises with CTI functionality today who wish to enhance enterprise functionality with network call parking and network routing or other components such as workforce management, Internet or web functionality
- ❖ Enterprises that desire advanced contact center functionality and are interested in acquiring a complete solution as a service.

Put simply, whether delivered by customer premise equipment (CPE) solutions, hosted in the network or a mixture of both, enterprises always demand control, choice and intelligence in a financial framework that is acceptable. Hosted solutions offer businesses the opportunity to deal with operating costs rather than capital expenditure which will always get a positive hearing at the budget-holder level of a business.

Respondents reported that they were most likely to get their website hosted, with outbound dialing functionality being hosted (or likely to be hosted soon) in 24% of respondents' contact centers.

17% of respondents use or are shortly to use hosted ACD and routing functionality, allowing them to manage agents, quickly change route plans, enable virtual contact center functionality and deploy skills-based routing to specific agent groups or even agents. 14% of respondents use hosted IVR solutions, allowing them to capture information, enroll callers, take orders, field requests and complete transactions.

Larger contact center operations are more likely to consider the reduction in operating costs that hosted solutions can provide to be worthwhile altering the structure of their contact center. In particular, the advantages to being able to route across sites to specific agent groups is seen as very important by this set of respondents, who are also very positive about hosted IVR solutions. Smaller operations are keener on hosted outbound solutions, meaning they do not have to pay for the equipment when they are not using it.

Respondents feel that the main advantages of hosted solutions lie in the decreased capital expenditure that such a model brings, as well as the possibility of increasing functionality quickly and cost-effectively, allowing them to try new applications without having to commit massive resources of time and money. More than half of respondents report that they strongly feel that hosted solutions can provide these two advantages.

*Table 1: Advantages to using hosted solutions*

<b>Advantage of hosted solution</b>	<b>Average score from 10</b> (10 is 'very important')	<b>% of contact centers</b> <b>rating as 8, 9 or 10</b>
Lower capital expenditure	7.0	53%
Increased functionality	6.9	55%
Manage call fluctuations	6.5	33%
Reduced ongoing cost	5.8	34%
Savings on technical support costs	4.2	18%

Large contact centers are most interested in hosted solutions from the point of view of increasing the functionality offered, and managing call fluctuations. One-third of all respondents feel that hosted solutions will allow them to cope with problems arising from call fluctuations: call spikes and the attendant high call abandonment rates are seen as a major problem for almost one-quarter of respondents, with a further 47% admitting that these peaks did sometimes cause problems with high levels of call abandonment.

The biggest negative issue around hosted solutions is nothing to do with any concern around cost or effectiveness, but rather a feeling that it is difficult to justify replacing the current technology in place. Certainly, if a business has just invested heavily in new technology, replacing the equipment with a hosted solution may be difficult to justify, but there are many businesses that are being held back by the lack of functionality or flexibility in their current systems, and which could benefit from moved to hosted solutions. From a financial perspective, most hosted solution functionality is paid for as an ongoing operating cost, rather than requiring an upfront major investment: this should make it easier for contact center management to persuade the budget-holder to upgrade the systems in place.

“Loss of control” is quoted as the third most important reason for not choosing a hosted solution, and is linked with the perceived inability to alter or fix issues as quickly as is necessary. While this has been a negative in the past, new hosted solutions allow the enterprise to control the application themselves and receive real-time management information about what is going on in the network.

Using a hosted solution provider is rightly seen as offering contact centers the opportunity to add new functionality quickly and easily. Within the next twelve months, respondents state that workforce management, CRM and VoIP will be the technologies most likely to get investment, with ACDs/PBXs and homeworking also coming into contention. 6% of respondents intend hosted solutions to be their no.1 technological priority, but much functionality can be offered as hosted solutions as well as traditional premise-based equipment.

## Information and Planning

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This chapter covers two main areas: the methods by which the predicted amount of work is carried out a cost-effective manner (workforce management), and the targets against which a contact center is judged to be a success (or not).

Two-thirds of respondents claim to be able to forecast and schedule rosters based on agent capabilities. In reality, this is likely to be along fairly generic lines, rather than taking into account each agent's actual skills and capabilities, compared to the types of calls being predicted. Most contact centers will tend to schedule 21-28 days in advance, with respondents in the healthcare sector trying to let agents know about their shifts two months ahead.

The vast majority of respondents compare the forecasts with the reality, in order to learn and keep improving, which is vital to successful workforce management. Without measuring adherence and understanding any errors, the business will be doomed to make the same mistakes over and over again.

A further 70% of respondents use 'what-if' scenarios - hypothetical models that will give an idea of staffing requirements and service levels depending on whether certain events happen, such as a new TV campaign driving up calls, a 'flu epidemic keeping agents off work or a self-service option going live.

The measurement of the contact center by the wider business has always been an area fraught with difficulties. Many contact centers were set up as a cheap way of dealing with necessary customer interactions, and were measured as a cost center. However, as time has gone on, many contact centers have become the main, or sole point at which the customer interacts directly with the business, as such, the key to customer satisfaction, loyalty and future revenue. However, many businesses persist in focusing on the old-fashioned call throughput metrics. As the contact center puts out so many hard metrics, the temptation will always be there to measure what is measurable, rather than looking afresh at what the contact center is actually supposed to be doing for the business, and judging it on that. The top three targets against which contact centers are measured by their senior management are:

- Overall staff costs - 83%
- Customer satisfaction rating - 81%
- Staff attrition rates - 73%

## Outbound and Call Blending

Retail & distribution and outsourcing respondents carry out the most outbound activity, of which a large proportion is of course sales-related. Only 5% of respondents are 100% outbound, with almost three-quarters doing some mixture of inbound and outbound. Smaller contact centers seem to carry out a greater proportion of outbound calling than larger operations, although in absolute terms, the large contact centers will be making far more contacts.

Despite the strictures of the Do Not Call Registry, it seems that 36% of outbound activity is still dedicated to winning new customers. Proactive customer service - which can be a strong brand builder as well as an effective call avoidance tactic - is in second place, at 26% of outbound activity. Cross-selling and up-selling to existing customers is not pushed as hard as it could be, at only 11% of outbound activity.

The Do Not Call Registry (and CAN-SPAM Act which deals with email) are part of the general social and political drift towards allowing consumers and businesses the right not to be contacted by companies. This is part of a global movement, perhaps indicated best by the state government of California, which does not allow over-dialing at all. Over 40% of respondents said that their outbound calling had noticeably reduced due to legislation, with more than half of this number saying that it had reduced a great deal.

Preview dialers are the most common type used by respondents. Smaller contact centers will tend to use preview dialing, with a greater proportion of large operations using top-end predictive dialers. The over-dial / drop rate for calls made by respondents with a predictive dialer is calculated to be 2.9%, although the highest rate admitted to was 8%.

Call blending gives the ability to deliver both inbound and outbound calls seamlessly to the agent, regulating outbound call volume based on inbound traffic. When inbound traffic is low, outbound calls are automatically generated for a specified campaign. When inbound traffic picks up, the dialer dynamically slows the number of outgoing calls to meet the inbound service level. Results can include increased agent productivity, streamlined staffing, and improved customer service. However, this process needs to be understood and managed carefully, as not all agents are adept at dealing with both inbound and outbound calls.

A structured blended environment, where agents are moved seamlessly and dynamically between inbound and outbound, is used in 21% of respondents' operations, with finance, outsourcing and insurance being the most likely to try to benefit from getting the most from their agents. The retail & distribution respondents are likeliest to get agents to make some outbound calls in their slack times, with healthcare respondents keenest to separate inbound and outbound entirely. Smaller contact centers are more likely to ask their agents to pitch in wherever is needed (ad-hoc), while larger operations are more likely to be able to use dedicated outbound agents.



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## Speech Technology

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Despite the growth in use of internet-based services the popularity of contact centers continues to grow:

- Customers like to talk and find voice the most convenient communication channel in many instances
- Customers' expectations continue to rise. Not only do they seek out competitively-priced goods and services, but they require quick, efficient services as well
- Customers' general level of awareness of identity theft as a real issue has also grown, and they expect to see that their private and personal information is protected by those organizations with which it is shared.

The challenge for businesses is to improve the customer experience, protect their customers' private and personal information and control their own costs. As such, the use of automated voice-based solutions has become widespread and promises further to offer a high-quality, rapid service to customers while keeping contact center costs down.

As we would expect to find, there is generally a positive correlation between the size of the contact center and the use of IVR. However, even in contact centers with at least 250 agent positions, IVR usage is only around 70%. This does suggest that commercial decisions **not** to use IVR have been made that are based around something other than cost considerations, i.e. if size were the only, or main factor in using IVR, we would expect to see almost all large contact centers using IVR.

However, there is wariness about IVR and indeed self-service of every type. Many businesses wish to be seen as strongly focused upon customers' needs, and putting what can be seen as a barrier between customer and business is anathema to them, despite missing out on the cost savings that an IVR implementation can create.

Identity verification procedures also cost businesses time and money. Although it only takes an average of 20 seconds to verify a customer's identity, this mounts up considerably: the US contact center industry spends over \$11.7bn each year, just to verify the caller is who they claim to be.

Using statistics from the Operational Review, it is possible to calculate how much US contact centers spend each year on screening customers by using agents:

Inbound call minutes per year: 243bn<sup>1</sup>  
Average inbound call length: 340 seconds  
Inbound calls per year: 42.9bn

Proportion of inbound calls that require security and identification checks: 53%  
Proportion of security and identification checks carried out by agent: 79%  
Average length of agent-handled security and identification check: 20 seconds

Mean average cost per inbound call: \$11.07  
Cost of time spent on agent-handled security and identification check: \$0.65 per call

Overall cost of agent-handled security and identification checking: **\$11.7bn per year**

Biometric technology uses physiological or behavioral characteristics to verify a persons claimed identity. Physiological biometrics includes fingerprints, iris, or retina recognition, and voice verification. Behavioral biometrics includes signature verification, gait and keystroke dynamics. Of these, voice is the only biometric that can be used over the phone. In fact, a voice verification system's strength lies in its ability to work over the phone or web making it a viable identity verification solution for contact centers.

Since speaking is natural and intuitive, a well-planned implementation can result in a better customer experience that eliminates the need for PINs or passwords. In cases where a two-factor authentication process is required, voice verification can be combined with a 'something you know' – such as an answer to a memorable question.

Businesses benefit from two types of savings, which can be illustrated in the following example, whereby a contact center receives 10 million inbound calls per annum with the existing identity verification procedure taking on average 20 seconds and being performed by an agent:

- Eliminating the time taken by an agent verifying a caller's identity can save 0.65c per call (\$6.5m per annum)
- Secure automated identity verification enable a broader range of fully automated services to be offered. An increase in the percentage of fully automated calls by 10% would result in agent cost savings of over \$11m per annum.

The potential benefits for the business are huge, and the customer also gains through a better experience, longer opening hours and greater identity protection.

<sup>1</sup> From ContactBabel, "The North American Contact Center Industry in 2006: The State of the Industry", July 2006

## *Work Smarter Tip #18:*

# Your Most Profitable Customers Are The Ones You Already Have

In a recent study by Aberdeen\*, researchers found that the average year over year Customer Retention rate was 47% and the average Customer Satisfaction rate was 74%. By implementing Multi-Channel Agent technologies best-in-class companies increased Customer Retention to 75% and Customer Service to 93% through decreased wait times, consistent service across all media types, increased agent retention and many other benefits.



voice



email



web



fax



task

### Can you afford not to implement a Multi-Channel solution?

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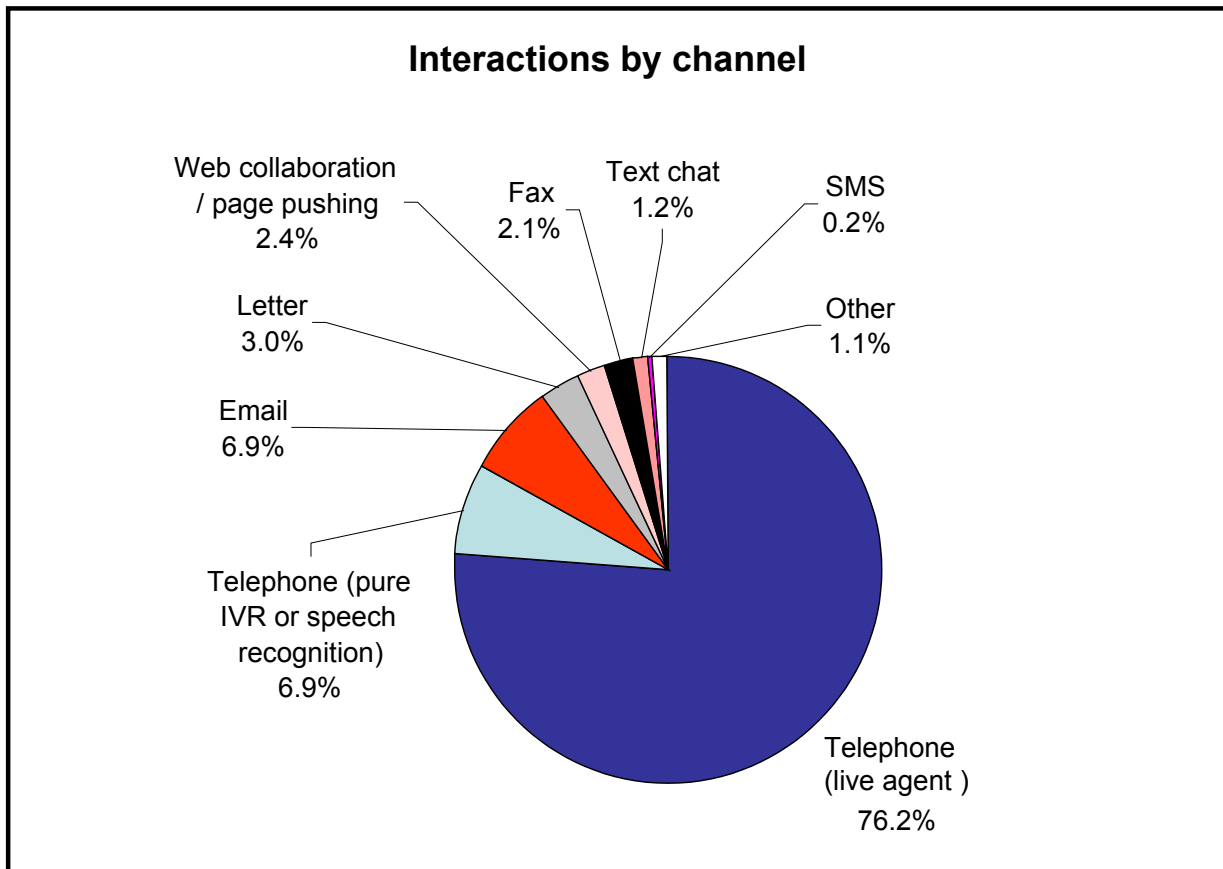
\*Aberdeen Multi-Channel Call Center Agent Benchmark Report

## Multimedia

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Although the volume of email into a typical contact center accounts for less than 10% of all interactions, 75% of this year's respondents deal with customer email within their operation. Text chat and web collaboration have a minor role in the overall scheme of things, but these are found in a small minority of contact centers which tend to use them quite a lot: email is much more widespread.



17% of respondents give themselves an hour to answer customers' emails (this does **not** include sending auto-replies saying the issue is being looked at). A further half of respondents say that they try to answer within a working day, with 21% of respondents setting themselves targets of longer than a day. 12% say that they don't have a target at all.

When setting a service level, we believe that businesses should aim to complete the interaction to the customer's satisfaction within the allotted time, not just to answer the initial enquiry with a standard automated response and consider the service level reached.

However, only 38% of respondents state that they even automatically acknowledge their reception of customers' emails (a figure that should be 100% - not doing so is like answering an incoming telephone call with silence). For a virtually cost-free activity to be so underused is little short of a disgrace.

16% of emails in respondents' contact centers are answered fully within one hour, which is a good standard to be aiming for. A further 18% take up to one working day, and 29% are answered by the next working day at the very least. This means that 63% of emails are answered within one working day, against a service level target of 67%, which is broadly positive. Only 8% of emails are acknowledged to take longer than 24 hours to deal with satisfactorily, which on the face of it, seems reasonable. However, there are a further 29% of emails to which respondents admit they have no idea what happens, although the emails' senders will tend to have a pretty shrewd idea.

There is a very important reason that email generally plays a distant second fiddle to telephony, and that is because 81% of emails are answered manually by an agent, with no assistance from an email management solution linked to a knowledge base, which could help get through the volumes of email, and provide consistent responses.

Respondents report that, in an ideal world, 21% of their interactions would be through email, rather than the 7% that it is on average today. Of the vertical markets surveyed, only outsourcing had reached this goal. Interestingly, despite varying levels of email today, the general desire seems to be for around 20% of interactions to be via email.

One of the main problems that has held email back is the poor support and attention that many contact centers have given to it, placing it very much behind telephony in terms of importance. This has meant that email service levels have been weak, and this in turn has discouraged people from using the channel. Of course, as the expected volumes of email have failed to materialize, businesses have tended to continue to ignore email.

The main inhibitor for increasing the use of emails as stated by respondents was connected with the fact that they believe customers prefer using the phone. As such, the companies themselves and the contact center industry in general must bear some of this responsibility for not putting the investment in place to deal with the email channel as soon as it was introduced.

However, email may not be the most suitable channel for many transactions, which may either require security checks, or a rapid response. As such, businesses need to analyze and understand the types the interaction that they receive, and push the email channel to customers only when it works as well for the customer to use email as it does the telephone.



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## Contact Center Strategy

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Most of this report has been about how contact centers are performing today, as should be the case with an operational review. The final chapter looks at the issues that keep contact center managers awake at night, and asks them which trends they believe will most affect their contact center operations.

The answers to these questions are that HR issues (attrition, recruitment, resourcing and absence) are currently what make contact center managers most concerned. Looking further into the future, the need to measure and improve customer satisfaction seems to be becoming an obsession throughout the industry, which is positive for customers and businesses. However, much of the short-term investment coming from the wider business seems to be focused towards technology, often looking more at improving efficiency than effectiveness.

The contact center industry is steady and massive, despite a number of major contact centers moving offshore or consolidating. It is key to note that none of the businesses which are making large closures state that declining call volumes are the reasons for this. In fact, increasing headcount within the contact center is the no.1 specific issue that will attract expenditure within the foreseeable future.

Our own view is that while the industry is growing in terms of increased call volumes, more needs to be done to increase the effectiveness of agents. The high levels of wrap-up time and non-call time is worrying, as almost 40% of an agent's time is spent doing something other than talking to customers. Agent desktop optimization – putting the right things on the desktop at the right time in the conversation, without disrupting the underlying system functionality – is starting to be exploited, especially in large contact centers with multiple, complex processes and legacy systems.

Self-service, especially through speech rather than touchtone IVR, is also an area which ContactBabel strongly believes will become vital to the contact mix, and judging by respondents' answers, IP is also mainstream.

Yet the background against which the technologies and HR issues that contact center management now talks about is that of customer satisfaction. This is the common ground where senior executives and contact center operations can now meet and discuss how to head in the right direction together. Much of what respondents to this survey have talked about is colored by improving customer satisfaction, the almost-certain driver of where the contact center industry is headed long-term.



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## About ContactBabel

ContactBabel are the contact center industry experts. If you have a question about how the industry works, or where it's heading, the chances are we have the answer.

The coverage provided by our massive and ongoing primary research projects is matched by our experience analyzing the contact center industry. We understand how technology, people and process best fit together, and how they will work collectively in the future.

We help the biggest and most successful vendors develop their contact center strategies and talk to the right prospects. We have shown the UK government how the contact center industry will develop and change. We help contact centers compare themselves to their closest competitors so they can understand what they are doing well and what needs to improve.

If you have a question about your company's place in the contact center industry, perhaps we can help you.

### About the Author:

ContactBabel was set up in 2000 by Steve Morrell, a leading expert on the contact center industry. Previously, he was the global head of Datamonitor's contact center and CRM analysis divisions.

Steve has written over 200 reports on the future of technology, people and business processes surrounding the contact center industry, and is widely-quoted in industry journals and the international media as the author of key studies of the UK, US, Irish, South African and Indian contact center markets.

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