Performance Measurement and Management Self-Assessment for Contact Centres

Introduction

This self assessment questionnaire is being run in association with Call Centre Helper and has been designed jointly by performance management specialists, Landmark Consulting, and contact centre specialists, ProtoCall One. Its purpose is to help contact centres assess their operations against the key aspects of performance measurement, planning and management.

While KPIs are important, there are other aspects of performance measurement and management to consider. If you're looking to achieve significant improvements in performance next year, completing this self assessment is a good place to start.

There are ten questions, and they will take you no more than 10 minutes to complete. Please respond as accurately and objectively as you can in order to gain the most value from this self assessment.

By completing this self assessment, we will email you an individual feedback report to help you understand how you can best develop your approach to performance measurement and management. There is no charge for this report.

Process

It is intended that the results will be fed back to us, so we can generate a large sample.

This will allow us to reply to each respondent with a benchmark of where their organisation is placed versus the industry generally and their sector specifically. The results will be portrayed as a radar plot, such as illustrated below:
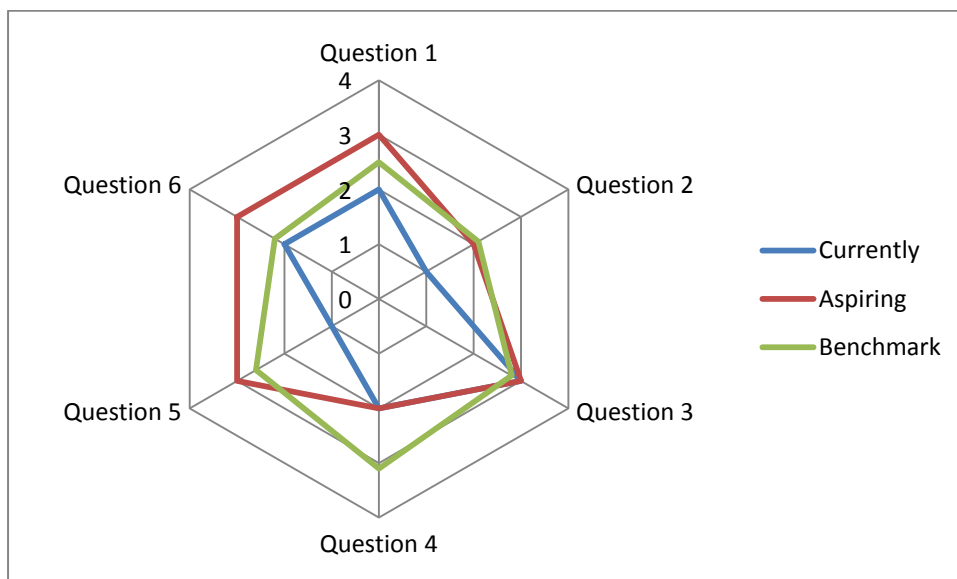
We expect to use a web application such as Survey Monkey as the platform for this self-assessment questionnaire.

We would need to contact respondents via their email address in order to send back a comparative report. We would also need to request sector and maybe contact centre size in order to do like for

like benchmarking. A further interesting differentiator may be whether the Contact Centre is outsourced or not.

Question 1. Performance Measures and KPIs

Regarding performance measures and KPIs, look at each of the statements A, B, C and D and then consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
We mainly use call-handling measures from the ACD, such as average-handling-time, time-to-answer, abandonment rate, service level performance, etc.	We use a basket of industry standard efficiency and effectiveness KPIs that include revenue, conversion rate, first call resolution, customer satisfaction.
C	D
We have derived a systemic set of KPIs that reflect our overall goals, including objectives beyond the contact centre, such as adherence to brand message.	Our KPIs are based around the customer experience, including direct feedback from customers. We share responsibility for these KPIs with other parts of the business, such as marketing and delivery.

Question 2. Performance management within the contact centre

Regarding performance management in the contact centre, look at each of the statements A, B, C and D and then consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
We monitor the performance of our agents and give them feedback against their KPI scores on an adhoc basis. We focus our coaching and development on our lowest-performing agents.	We routinely monitor the quality and performance of our agents. Supervisors have one-on-one meetings periodically with agents to give feedback on performance achievement against targets.
C	D
In addition to agent performance, we frequently compare performance within and across teams and also look at sharing best practices across teams and contact centres, in order to achieve continual improvement.	In addition to evaluating agent performance against internal KPIs, we also use direct customer feedback as a basis for coaching individual agents and collective learning about how to improve overall customer experience.

Question 3. Performance planning processes

Regarding performance planning processes, look at each of the statements A, B, C and D and then consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
We use historical contact information to forecast future demand and then translate this forecast into our staff roster. We use tools, such as Excel, to manage this process.	We build our forecasts based on a combination of historical analysis and planned growth. We use specialist workforce management software to aid our forecasting, scheduling and rostering.
C We track real-time adherence of resourcing to plan, and also adjust breaks, meetings, overtime, etc in order to manage 'unders and overs'. We adjust our forward forecasts in the light of adhoc notifications from other parts of the business.	**D** We work with the rest of our business to understand future promotions and other changes, and reduce the occurrence of unwanted and potentially avoidable contacts. This planning process takes place regularly and involves cross-functional decision-making.

Question 4. Responsibility for managing performance

Regarding responsibility for managing performance, look at each of the statements A, B, C and D and consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
Either supervisors or a central quality assurance team are responsible for managing individual performance. We have a separate performance reporting function that generates and distributes standard reports on business KPIs.	In addition to supervisors managing performance on a day-to-day basis, contact centre managers are responsible for optimising customer service. They are required to provide regular updates on potential improvements against key contact centre KPIs.
C We have a clear multi-level structure in which groups of supervisors and managers come together to review and make collective decisions affecting performance within both the contact centre and the rest of the business.	**D** Our contact centre is fully integrated into overall business performance planning and improvement. All levels of management have an explicit, interlinked role in performance planning and improvement.

Question 5. Goals and target-setting

Regarding goal and target-setting, look at each of the statements A, B, C and D and consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
Performance is primarily defined by internal targets for individual agent performance. Supervisors have additional objectives to achieve, such as staff development.	In addition to individual performance targets, we have internally and externally imposed objectives relating to continual improvement, such as reducing costs by 5% or meeting regulatory requirements.

C	D
Our internal and external targets help focus our drive for continual improvement. Everyone plays their part in driving both performance and improvement and we work well together to maximise performance against our collective goals.	We have aligned objectives at all levels, from front line upwards, that allow everyone to contribute to our overall business strategy. We focus on the levers we can actually pull. We also take time to review the impact of our decisions and actions.

Question 6. Clarity and accessibility of performance information

Regarding clarity and accessibility of performance information, look at each of the statements A, B, C and D and consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
We have a standard set of KPI reports that are made available either through email or a 'dashboard-like' system. Supervisors and contact centre managers have no ability to request ad-hoc analyses of performance information.	We have a 'visual factory' approach to performance information, with team results posted in the contact centre or emailed to team members. We have an analysis group that support supervisors and contact centre managers in understanding performance information.
C	D
All those with performance management roles, from supervisors upwards, have been trained in accessing and interpreting relevant performance information. This capability extends beyond interpreting simple tables and charts of KPIs to the ability to explore the drivers of good and poor performance.	We have an 'open book' approach to performance information. Comprehensive information is readily accessible to teams and cross-functional groups, such as via a portal on our intranet site, to gain insights into what is happening, what is coming up and what impact our improvement actions are having in practice.

Question 7. Performance management culture

Regarding performance management culture, look at each of the statements A, B, C and D and consider which statement most closely represents where your business is now. Then consider where you want your centre to be in 12 months time.

A	B
Performance is seen as a system for identifying either poorly or highly performing employees. We have both positive and negative incentives associated with individual performance against reasonable expectations.	In addition to monitoring and managing individual performance, we also focus on tracking and achieving collective expectations. However, we suspect we may spend more time reporting performance against our KPIs than actually moving performance forward.

C	D
Managing collective performance is seen as a key contributor to maximising our contribution to overall goals. Most people see this as a route to positive involvement in continual improvement There is a fair degree of empowerment across our organisation.	Striving for performance improvement is ingrained in the way we do things. Each member of our senior management team is a role model for finding new ways to improve our business and they frequently congratulate individuals and teams who achieve remarkable performance.

Question 8. Importance of performance measurement and management

Regarding the priorities in the development of your contact centre, please rate the relative priorities of performance measurement and management and other areas of development for your contact centre.

Please rate on a scale from 1 (Unimportant) to 5 (Extremely important).

a) Improving performance measurement and management within the contact centre
b) Improving the customer experience
c) Developing your people
d) Business process re-design and improvement
e) Introducing new technology
f) Focusing on operational efficiencies

Question 9. Barriers

Now think about the key barriers that may stop you from improving performance measurement and management in your contact centre. Please tick all those that apply, and then describe any other barriers not covered in this list, using the comments box.

- Senior management understanding and support
- Lack of budget
- Cultural brick wall between your contact centre and the rest of the organisation
- Insufficient in-house skills in business performance management techniques
- Any other barriers specific to your circumstances (please specify below)

Question 10. Sector, size and contact details.

In order that we can provide you with an individual feedback report for your company, please provide us with the following information. Please note this information will be used purely for the purpose of benchmarking within our survey and your details will not be passed onto any third parties.

Please complete the following.

- Contact centre size
- Industry Sector
- Is your contact centre outsourced?
- Your role
- Name
- Email address for free personalised report
- Telephone number