

How to Audit, Baseline & Benchmark to achieve a World Class Contact Centre

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Why should you audit, baseline and then benchmark your call centre or contact centre or customer service centre? In the simplest terms possible: So that you can improve its performance. Or, putting it mildly: If you are NOT constantly making improvements and positive adjustments to every facet of your contact centre operation, the certainty is that it will be constantly deteriorating.

All well and good to set out to be a 'World Class' contact centre and to strive in all things to achieve this laudable accolade but lets pause for a moment and look at the actual definitions of 'World Class'. What is it that we are actually setting out to achieve? It's a journey. This we know. But where will this journey take us? Through what uncharted waters will we have to voyage on bravely? What manner of demons and dragons will we encounter along the way. Will the quest be worthwhile?

Well, the linguistic experts tell us that 'World Class' means: " Goods, services, and processes that are ranked by customers and industry experts to be among the best of the best." All good and well. Now let's look at the second part of the definition. It says: "This designation denotes standard-setting excellence in terms of design, performance, quality, and customer satisfaction and value when compared with all similar items from anywhere in the world." Now there's the real challenge. Is it worth the quest; the odyssey? It most certainly is. In that high place of excellence your call centre runs like a Ferrari on steroids. Its effective. Its efficient and it achieves all of its prescribed operational objectives. Any you look really good!

So. Lets take the first steps towards achieving this 'Contact Centre Utopia' . To be truly 'World Class' our contact centre needs to comply with three fundamentals. Firstly, it has to be totally and undeniably aligned with and supporting the organisation's core strategic goals and aspirations. If its not doing this, the operation is probably operating counter productively and certainly unnecessarily squandering valuable resources.

Secondly, your contact centre must operate according to specific standards. Now there's yet another challenge. What standards should you adhere to? Well, strictly speaking one could simply define one's own 'standards'. These comprise the operating model, the strategies and objectives and the operational KPIs that drive (or should drive) your centre. And there are literally hundreds of them to chose from. In fact, in a recent exercise the C3Africa consulting team

accumulated over three hundred contact centre KPIs from a host of diverse sources ranging from the writings of well-known and respected authors such as Brad Cleveland (Call Centre Management on Fast Forward) to the Dimension Data / Merchants Global Benchmark Study. And based on their own experience, the team threw in a host of their own 'standards' and KPIs just for good measure.

Thirdly, to be considered 'World Class' your contact centre needs to be benchmarked against similar operations. Or, putting it more succinctly: 'Benchmarking against National, Regional and International same sector and competitive call centres.' And therein lies the real challenge. How do you actually go about benchmarking your call centre or contact centre?

Well, Option One says. Call in one of the well established call centre consultancies and check out their methodologies and their credentials. Then call for a quote. Once you have fully recovered from your coronary and been discharged from the intensive care unit you may want to consider carrying out your own contact centre audit, baselining and benchmarking; setting up an internal project and putting that tribe of underworked young call centre supervisors and team leaders to work. (Like they don't have other things to do!). But it is certainly an option. And its not difficult at all. Here's the 'How To' part....

HOW TO AUDIT, BASELINE & BENCHMARK YOUR CONTACT CENTRE

For clarity, lets start with some more definitions. Just so that we all know what we are doing and why. What's a baseline?
According to Wikipedia

baseline

Noun

- A value or starting point on an imaginary scale with which other things are compared
- A line serving as a basis, as for comparison, measurement, calculation, or location.
- A basis for comparison; a reference point against which other things can be evaluated

How's that for a start. Lots of good stuff in there. '... which other things are compared.' Or how about '.. basis, as for comparison, measurement, calculation ..' And the one I live is '.. reference point against which other things can be evaluated.

Okay. Now lets get on with the 'benchmarking' thing.

bench·mark

- A standard by which something can be measured or judged:
- To measure (a rival's product) according to specified standards in order to compare it with and improve one's own product

And there you have it again. 'Standards', 'measurement' and 'compare'. Enough of all this stuff now. Lets get on and do it....

HERE'S YOUR TOOLKIT

For openers, here's your toolkit. Its all quite simple really. Don't give up on me now ! All you need to learn is ...

- What to Measure
- How to Measure
- How to Score
- How to Create Dashboards
- How to Prioritize the Fixes

by reading on for the next few minutes you will have all of the tactics and the techniques. (You'll have to provide your own tenacity!)

Lets start with the easy part. What to measure. Well, we want to make a big difference to our contact centre operations so lets measure our actual Operational Maturity. How good (or bad) are we in operational terms? Have we learned from all of those silly mistakes that we have made over the years? Have our improvement interventions made a difference? If so, how much of a difference? Then of course, we will also need to measure how well (or badly) we have done in terms of integrating our business and organisational strategies with our operations and, of course, with our technologies. Overall, what it is that we want to come up with is an accurate picture of where our contact centre is in terms of the three imperatives; Competency, Capability, Compliance and Capacity (Yes, here at C3Africa we have a thing about 'C's' !)



That decided, lets move on ...

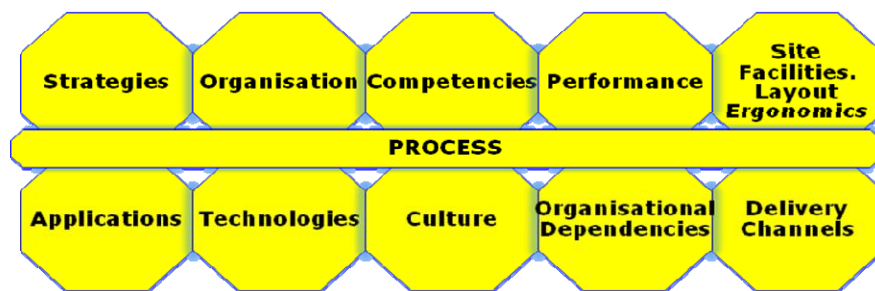
WHAT DO YOU NEED TO UNDERSTAND IN YOUR CALL CENTRE ? WHAT TO MEASURE...

Only you will be able to architect the next part.

What specifically do you need to truly understand in your particular call centre or contact centre? Here's a short checklist to get you started. (I strongly suggest that you create this tool in an application such as Excel.) Operationally you may want to start with Management, People, Processes, Technologies, Knowledge Management, Reporting (and MIS), Quality and Workforce Management or Workforce Optimisation (as it becoming fashionably referred to!).

Then you would be well advised to start looking to audit your key Strategic considerations. How about: Organisational and Operational Strategies, followed by Business Issues and Business Integration, Financials and lets not forget Customer Experience and Staff Wellness and Engagement.

Here are the eleven principal areas of contact centre operations that should be audited.



Now you are well on your way to being able to expand these headers each into twenty, thirty or even hundreds of sub-headers. These will be aspects of your contact centre operation that you can firstly identify and secondly, align with a set of standards and KPIs (albeit they your own). With categories, headings and sub-headings in place, your contact centre audit tool is starting to take shape. Once you expand these sub-headings into specific questions you will start to see how the answers to these become your actual audit methodology. If you are diligent in the manner in which you approach the construction of your audit toolset you will quite easily find that you will eventually have a set of anything between 400 and 600 checkpoints or questions or over 1000 if you integrate the SA Contact Centre Standards (See below)

In addition to establishing your own operational 'Standards' you would be most strongly advised to align the relevant aspects of your call centre or contact centre with the South African Bureau of Standards Call Centre / Contact Centre and Back Office Standards. This magnificent collection of work is the product of over four years of intensive development by a task team comprising well over 70 industry professionals.

The Standards represent true 'best practice' and are a superb starting point for any operational audit and for the establishment of baselines and benchmarks. You can obtain copies of the three sets of standards by purchasing off the SABS website at www.sabs.co.za. Alternatively, there are direct links to the SABS on-line Webstore to be found on www.contactindustryhub.co.za

HOW TO MEASURE – HOW TO SCORE

As a principle, how one actually measures aspects of your contact centre is somewhat semantic for as long as you are consistent in your measurements and that your method can be aligned back to certain established benchmarks, standards and other operational KPIs.

As a starting point you may want to use a scoring methodology developed by the C3Africa consulting team after having reviewed many different scoring methods used by call centre consultancies in many parts of the world.

A starting principle is one of 'Compliance / Non-Compliance' and in some areas of the operation and in respect of certain Standards, a simple 'Comply / Not Comply' is required. Its binary; Yes/No. But what of 'shades of grey'? Here's how we approach the latter using a simple scale of 0 to 5.



We score a **ZERO** where some aspect of the contact centre does not exist at all; where it is not in evidence; no knowledge of it within the operation or it does exist but is specifically not observed within the operation. We also apply a factor of risk to the operation.



To score **ONE** for whatever it is that we are observing it is present but its implementation is inconsistent, ad hoc or there is insufficient evidence (documentation and interviews with personnel) to verify that it exists or is implemented or observed in the operation.



To score **TWO** we need to be able to see tangible evidence that such a practice is, in fact present in the operation but it is not actually integrated as part of the day-to-day operational practice. It may have the basics in place but a great deal of development work is still required. It needs to be full assimilated into the operations and understood by all personnel. Risk is also taken into account and may bring down scores.



A score of **THREE** is a good indicator that the operation is aware of the importance of this measure, standard or metric but its application is not fully integrated into the operation as a key aspect of continuous improvement initiatives. It may be present and fairly well defined but it may not be reported on or there may be insufficient evidence of its application. The 'Quick Fix' for three-scores are usually easy and inexpensive. Risk is also a factor.



A score of **FOUR** is an extremely healthy figure. At four, we are looking at – for example – a policy, process or operational procedure or methodology that is fully integrated into the operations of the contact centre. It will certainly be measured accurately on a day-to-day basis; it will be reported on regularly (a management daily dashboard is a good indicator of a 4) and this measurement, metric or practice will be seen by all within the operation to be a significant contributor to the operation's continuous improvement programme.



A score of **FIVE** is awarded where we see true 'World Class' standards and operational excellence in evidence. To recap: To be considered 'World Class' a contact centre must support and be aligned with the core business strategies of the organisation. Operationally it must meet specific standards and thirdly, it must constantly benchmark itself against National, Regional and International sector and competitive contact centres. It must embrace the principle of Continuous Improvement.

ALSO AUDIT FOR RISK

As an aspect of setting up your audit tool (spreadsheet) you will be well advised to provide for a simple yet highly effective Risk Assessment. Almost every line item of your audit checklist will be able to be scored for risk to the operation or to the organisation. Whilst there are a number of sophisticated risk assessment tools and methodologies available on the market, we have found that a relatively simple 'High-Moderate-Low' assessment works. To enable calculations and the development of Risk and Prioritisation models we suggest that for the purposes of your spreadsheet you weight these assessments as follows: High Risk = 5, Moderate Risk = 3, Low Risk = 1 and No risk = 0

COMPILE THE AUDIT TOOLSET

Armed with your spreadsheet-based audit tool listing each and every strategic and operational component of your contact centre and a method of identifying either 'Compliance' or 'Non Compliance' as well as a 0-5 scoring method and a numerically graded Risk Assessment, the rest is long hours and hard work gathering information, data and operational evidence and entering this information into the spreadsheet tool. Now the fun part starts.....

By the time you have completed the actual audit and populated your spreadsheet you will have a vast amount of statistical data to start working with. You may want to start by totalling and averaging scores by section. For example: Technologies, or Human Capital or Processes. And here will emerge the really significant scores. You will find that each section that you work on will produce an averaged score of anything between Zero (heaven forbid!) and 5; World Class.

As you continue through each section you start to build a data set that will eventually allow you to plot exactly where your contact centre is at the time of the audit. The data will also clearly show you where there is a specific improvement intervention needed and the addition of the Risk Assessment should also be a clear indicator to guide you towards building prioritisation models.

DEFINE AND IMPLEMENT THE 'FIXES'

Having identified all of the dimensions of your contact centre that collectively make it the absolutely unique operating environment that it is; setting down your own or other recognised benchmarks and standards and finally applying a risk index, as an experienced contact centre professional, crafting the 'fixes' or improvement interventions is No longer "rocket science". In fact, in most instances you will find that the majority of the 'fixes' will boil down to Processes and Disciplines. That done, create the improvement and development project, assign tasks and deliverables to your team and then watch the magic start to happen!

When you conduct your second and subsequent audits some three to four months after the initial assessment you will be astounded with what can be achieved in a very short space of time and with limited spend.

CONCLUSION

The journey from being a very basic call centre to being recognised as truly 'World Class', is a long and arduous road. It's not easy. But as long as you have a clear picture of each of the many hundreds of checkpoints that make up your operation, a rational and methodical approach will get you there a great deal quicker than you might have thought.

Have fun doing it !

Remember: If you are NOT constantly making improvements and positive adjustments to every facet of your contact centre operation, the certainty is that it will be constantly deteriorating.

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