Performance Management
KPI Dashboards
Using Big Data to Align Enterprise Objectives
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Optimizing contact center performance by making key performance indicator (KPI) dashboards available to executives, center managers, supervisors and agents can increase their ability to align their efforts with quality standards and enterprise objectives.

When implemented appropriately, KPI dashboards enable staff to adopt a cultured discipline for responding to emerging challenges and changes in ways that improve operating effectiveness and efficiency, and thus contribute to profitable growth.

The ability to view current performance data in summary snapshots and as trends along with relevant interaction detail makes the KPI dashboard a powerful tool for customer-focused enterprises to use to excel.

Effective performance management draws relevant data from sources throughout the organization. Consolidated and analyzed, it becomes visible and actionable through role-based KPI dashboards.
Cross-departmental data input to KPI metrics is crucial to achieving a complete, consistent and reliable snapshot of the ‘truth’ about current operating performance. Including enterprise data in the contact center performance measures ensures staff has a complete, accurate picture of performance. Information from interactions helps identify product and service delivery weaknesses and workflow bottlenecks. Contact center analytics provide a consolidated view of operating activity – a single version of the truth about what’s happening in interactions.

Performance management (PM) analytics dashboards support monitoring the quality of interaction activities such as purchasing products and services, checking order and shipment status, bill payments and adjustments, account status inquiries, inquiries about use of products, service delivery, requests for information and expressing compliments and suggestions.

**KPI Dashboards Drive Performance**

*Insight* CallCopy’s performance management platform, enables users to capture and analyze data from sources across the enterprise. Dashboard reporting delivers actionable insights to executives and front-line managers, driving alignment to enterprise objectives.

Insight operates as part of CallCopy’s *cc: Discover* workforce optimization suite or as a stand-alone enhancement to third-party call recording systems. With data aggregated from enterprise applications, Insight provides anywhere-anytime access to KPIs in graphical displays on workstations, laptops, smart phones and tablets.

Big data, or the collection of complex data from sources across and outside of the enterprise, provides critical information feeds to KPI dashboards. Systems that could serve as data sources include:

- Customer relationship management (CRM)
- Enterprise resource planning (ERP)
- Voice and screen recordings
- Quality management (QM)
- Voice of the customer (VoC) system
- Workforce management (WFM)
- Private branch exchange (PBX)
Performance Management Dashboard Sample Use Cases

The following use cases illustrate how dashboard KPIs driven by enterprise big data and speech analytics help organizations continuously improve their business processes and expenditures.

Case #1: Product or Service Issues

A manufacturer of consumer electronics was confronted with many customers calling to report defects in a new product. The company struggled to identify the specifics of the problems, listening to all call recordings to identify effected customers and determine impact on the business. To address this critical issue, the company deployed a performance management dashboard that reported the number of calls, customer cancelations and truck dispatches, as well as the cost of product replacements and avoidable service truck dispatches. The system’s speech analytics identified calls mentioning the defect, and automatically related them to data in the CRM and ERP systems. The correlated data now feeds the KPI dashboard, which alerts responsible staff who can now respond quickly and effectively to emerging issues.

Case #2: Process Improvement

A cable company’s agents were successful in resolving customer issues on the first call. However, they were following a procedure that relied on the customer to call back to cancel their home service request after the agent resolved their issues. This practice caused many unnecessary and costly home service visits when customers forgot to call to cancel their request. Recognizing the need to alter this practice, which was driven by an emphasis on first call resolution (FCR), the company deployed a KPI dashboard that mapped data from their CRM and WFM systems to relevant calls identified through speech analytics. Management adjusted its procedures to avoid unnecessary home service visits. They also modified agent performance standards to no longer focus primarily on FCR, but also on reduction in home service dispatches for problems that could be resolved during live customer interactions. Savings from these practice improvements were significant.

Use speech analytics to uncover emerging issues, such as product/service issues or competitive threats. When related to data from other sources, management can quickly respond with corrective actions to minimize risk.
Case #3: Product Up-sell and Cross-sell
A retail chain wanted to take advantage of inquiries for items that were sold out, by training agents on up-sell and cross-sell techniques. By deploying speech analytics and agent KPI dashboards, the company was able to track inquiries for sold-out items, as well as the rate of conversion to in-stock items, the rate of closing special offers and the duration rate for confirming items, along with greeting and closing adherence and call transfer rate. The KPIs drew on relevant enterprise data from the chain’s CRM and ERP systems.

Case #4: Process Adherence
A direct sales company was experiencing a costly problem with order fulfillment when contact center agents were instructing customers who received incorrect products to keep rather than return them. As a result, the company was giving away product unnecessarily. Consequently, management deployed speech analytics to automatically identify ‘wrong product received’ calls, and link them with CRM and ERP shipping data. After management adjusted the agents’ instructions and provided each with a KPI dashboard that monitors adherence to the new practice for requesting returns, the result is ongoing savings.
Performance management KPI dashboards give staff at all levels – from executives to front-line agents – the ability to hear and see what is happening in aggregate, as well as within each interaction. Equipped with such fresh knowledge, they can quickly respond to emerging situations in ways that support organizational goals.

Staff’s responsiveness to arising issues is measurable in the standard indicators of customer satisfaction (CSAT) level, FCR rate and call handling utilization rate. When PM KPI dashboards are deployed appropriately, the enterprise and contact center can enjoy rising customer satisfaction and loyalty, higher FCR rate and diminished utilization rate since fewer customers need to call back.

Insight’s dashboards are accessible on smartphones and tablets, enabling anywhere, anytime access to KPIs and supporting real-time communication among staff.
Enabling Timely Coaching

Timely visibility into performance trends and issues enables supervisors to more timely and effectively coach frontline agents.

Agent engagement improves when agents are made aware of performance issues quickly before one-on-one performance review and coaching sessions with supervisors. Emailing relevant coaching materials pertaining to specific performance issues to agents in advance of review sessions gives agents opportunity to understand the particular issues and standards, and be better prepared to self-correct and address remedies that will improve future handling of similar issues.

This best practice improvement cycle enables contact centers to aggregate call recordings and related enterprise data. Users can analyze the interactions with speech and desktop analytics and monitor KPIs from all staff perspectives, reporting actionable issues immediately. Then staff can work most efficiently and effectively to meet the enterprise’s objectives for success.
Performance management dashboards help senior management make timely policy and change management decisions to steer the organization to higher profitability, reduced risk and lower operating costs. When performance trends emerge that indicate operating problems, management quickly becomes aware of the situation and can make necessary adjustments to limit damage and turn activity in the desired direction. The PM dashboard gives managers the ability to make informed decisions that guide positive change, reduce costs and improve the customer experience.

Analytics Support Business Performance

Analytics tools can identify the top reasons customers are buying the organization’s products or services. Capturing customer feedback by analyzing interactions provides insight into potential improvements that may not have been otherwise elicited through customer surveys. Interaction analytics tools, such as speech analysis of call recordings, help users quickly adjust to reactions to new product entries, the impacts of promotional campaigns and the effects of outside forces on consumer buying behaviors. Analyzing the root causes of issues through speech analysis helps managers and supervisors assess deviations and outliers by KPI, enabling them to provide timely and relevant coaching. Speech analysis enables managers to categorize calls and to report analysis results daily and as emerging and ongoing trends. Users may track the reasons for customer calls and review and revise selected key terms and phrases continually.

The Power of Speech Analytics

Speech analytics tools, such as CallCopy’s cc: Analytics, help operationalize unstructured voice interactions by locating specific words and phrases in call recordings, helping management discover new insights for improving their organization’s products and services, reducing liability risk and increasing customer satisfaction.

Organizations use speech analytics to identify trends, emerging issues and root causes of customer perceptions. It is used to find ‘best’ or ‘worst’ examples of handling interactions for agent evaluation and training. Speech analytics can also be used to detect abnormalities that indicate workflow issues or process improvement needs. The power of speech analytics supports performance improvement when its results are related to data from other sources, and fed into KPI dashboards.
Deploying a PM KPI dashboard within the organization’s contact center provides the ability to monitor daily activity at agent, team and shift levels. KPI dashboards may be tailored to display KPIs based on individual and group roles. For example, the executives’ dashboard displays rollups of the individual, team and center KPIs. The executives can drill down into each metric to view details of performance. Similarly, department heads and contact center directors, managers and supervisors have appropriately tailored KPI views displayed in their dashboards. Frontline agents’ dashboards show their individual and team KPIs with the ability to drill down to their call lists to review recordings of their past interactions.

Role-based Views of Operating Performance

At the highest levels in the enterprise, c-level executives and departmental heads need complete and comprehensive views of the organization’s activities in summarized perspectives that show key trends and directions and that highlight areas for concern that need attention. Their PM KPI dashboards need to display performance indicators at the consolidated business unit and department levels and enable the users to drill down into activity reporting to examine where activities are diverging from plans and standards of performance required for the enterprise to meet its set goals and objectives.

Director Dashboard

For the contact center director, summarized KPIs for the center are augmented by line item KPIs for each manager within the staff hierarchy. The click-to-act drill-down ability in the KPI dashboard enables management to keep alert to performance trends and to examine activity of managers, teams, supervisors and agents.
Supervisor Dashboard
Each manager’s and supervisor’s view of their area of responsibility displays their relevant KPIs. Indicators for teams provide leaders with the ability to review member’s adherence to performance standards and alignment to goals.

Agent Dashboard
Each agent’s KPIs are essential to effective performance and enable the agent to ‘drill down’ to list and listen to recorded calls for which the agent is accountable.
Incorporate Data from All Relevant Sources

Complete, comprehensive input of relevant key indicator data from enterprise applications and outside benchmark sources is critical to obtaining the most ‘truthful’ view of organizational operating performance. Having current data inputs improves the KPI dashboard users’ capabilities to achieve the best possible responses to emerging challenges and change requirements for successful outcome. This practice applies to the contact center and across the enterprise.

Embrace Adoption at All Levels of the Organization

To be implemented effectively, PM KPI dashboards must be used daily by all parties in the organizational hierarchy and be tuned to the specific information needs of each user role from top executive to frontline agent. The enterprise must develop a culture of immediate responsiveness to issues arising from the KPIs. Efforts of all staff must align to the indicators pointing to where adjustments are needed to keep the organization moving forward toward attainment of its goals and objectives.

Drive Quality Through a Process of Continuous Improvement

The enterprise must embrace a process cycle of continuous monitoring and refinement of activities that lead to performance improvements that meet and even exceed quality standards and service delivery excellence that motivate customers to be satisfied and remain loyal customers.
CallCopy, a leading provider of innovative contact center solutions, is dedicated to ensuring the highest standards of satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, desktop analytics, performance management, customer satisfaction survey and workforce management capabilities to organizations of all sizes and industries. For more information, visit www.callcopy.com.

To learn more about how performance management KPI dashboards in CallCopy’s **Insight** can help your organization develop a best-practice discipline for aligning all staff to work to achieve your enterprise goals and objectives, please contact us at:

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