SOME OF TODAY’S COMPETITIVE PRESSURES

- Improve customer experiences
- Address increasingly complex issues
- Handle growing and varied workloads
- Improve consistency in service delivery
- Provide more personalized services

- Offer customers greater choices and control
- Integrate new communication channels
- Be available when needed
- Boost revenues and reduce costs
- Deepen customer loyalty
- Create brand advocates

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Infrastructure: Change from the Ground Up

To understand today’s developments, it’s essential to have some context. Go back with me—for just a moment—to how we got here. Let’s start in 1858, 15 years after Samuel B. Morse introduced the telegraph (Chapter 1). After more than a year of enduring storms, sickness and failures on the high seas, the crew of HMS Agamemnon completed running the first transatlantic telegraph cable. Investors on both sides of the Atlantic had provided the funding, and hopes for the beginnings of a new communications era were high.

Unfortunately, the signals that trickled through the cable were so weak that it took over 16 hours and the most sensitive equipment available to decipher the first message (which, incidentally, was 90 words sent by Queen Victoria). Worse, the cable’s insulation failed several days later, and the telegraph never worked again. For onlookers, investors, and especially the crew, this was a heartbreaking and bitter end to an immense and bold undertaking. But the project—though viewed as a failure at the time—helped to establish a vision of a more connected world.

“A plate of silver and one of zinc are taken into the mouth, the one above, the other below the tongue. They are then placed in contact with the wire, and words issuing from the mouth are conveyed by the wire.”

1854 NEWSPAPER, DESCRIBING HOW THE YET-TO-BE-INVENTED TELEPHONE MIGHT WORK

It wasn’t until almost a century later, in 1956, that the first transatlantic telephone cable was inaugurated, running between the British Isles and Newfoundland, Canada. The crew and investors of 1858 would be amazed to see what has transpired since. High-capacity fiber optic cables crisscross oceans and continents, and satellite transmissions reach homes and businesses in the most remote parts of the globe. With more than five billion subscriptions, mobile services provide connectivity virtually everywhere.

As I write, I'm in San Diego—but could just as easily be in Seoul, São Paulo, or Southampton. Let's call this worldwide connectivity phase one; it was over a century and a half in the making.

Of course, the development of our global communications network has led to more than just the ability to connect. A key part of the equation is the way information and services are digitally represented and transported.

Consider a familiar example: digital photography. You can snap a picture on your smartphone, post it to Instagram, text a link to Grandma, and use it as the home screen image on your phone. Similarly, music can be downloaded, edited, transferred to a portable player, used as the ringtone on your mobile device, and easily played through your car or the speakers you bring to the beach.

Pictures, music, calls, messaging, video, television, movies, games (you name it) have been forever freed from the rigid technical confines of the past. Everything is digital—let's call that phase two.

If it's all digital, any of these media can be integrated to create new services. Let's call Grandma—by video of course—and show her San Diego's Old Town, the park we're visiting. In fact, let's set a few pictures and video clips to music (Mariachi would be perfect) and share it with the rest of the family…it will just take a moment. We can refer to the integration of digital media with other services as phase three.

Oh, and about San Diego, someone mentioned a fascinating documentary that contrasts the different cultures of the region. The gift shop features a collector's set on Blu-ray … or, wait, I'll go online and we can stream it to any device. And on the topic of online, it's nice to know these priceless pictures are being backed up automatically. We can refer to these capabilities as phase four: cloud-based or hosted services.

Speaking of cloud, it's getting cloudy—should we expect showers? Let me ask Siri…Good, it's clearing and will be a perfect 76° this afternoon. Let's call this phase five: AI-enabled capabilities that understand language, provide information, and even help with a forecast.

Infrastructure Evolution

I've seen a similar progression in contact centers. As the world became connected, contact centers began to spring up out of the customer expectation for services "on demand."

Let's start at the birth of the "modern" contact center. Two developments in the late 1960s and early 1970s launched contact centers as we recognize them today. Toll-free "800 service" was introduced in 1967 and the automatic call distributor (ACD)—now more accurately described as an automatic contact distributor—came along in 1973. Those advancements provided the basic capabilities contact centers still very much depend on: identify, route and distribute customer contacts to a pool of cross-trained agents. In short, make connections between customers and someone who can help.

Integrated voice and data first became possible through "computer telephony integration" (CTI), introduced in the late 1980s. CTI enabled screen pops (simultaneous voice and data delivery), database-driven call-routing, integrated performance reporting, and a host of other capabilities. But CTI was transitional, an attempt to bring together what were still two separate worlds: voice and data. And it was expensive and required a significant amount of programming, making it impractical to implement for many contact centers.

The migration of traditional circuit-switching based on time-division multiplexing (TDM) to packet-switching based on Internet protocol (IP) brought fundamental change to contact centers.

What were essentially two sets of technologies—one for voice, one for data—became part of the same platform of services. That opened up all kinds of new capabilities.

IP-enabled services also helped usher in the next phase of development: hosted or cloud-based services. (Contact centers use a number of terms to describe these services, including cloud-based contact center, hosted contact center, virtual contact center, and contact center as a service or CCaaS.) Virtually any capability available in premise-based (on site) equipment and software can be "rented" and delivered through the cloud, leaving much of the development and many of the maintenance activities to the supplier.

The benefits of today's IP- and cloud-based technologies are significant, including:

- OMNICHANNEL. All channels (e.g., voice, chat, text, video, social media) can be integrated and handled by a common routing and reporting system. True omnichannel enables the customer and agent to move from one channel to the next, with reports maintaining a holistic view of the experience.
- VIRTUAL. Anyone who is part of the organization's network—including agents working from home, and colleagues in other departments or across the globe—can be part of the contact center, whether routinely or on an as-needed basis.
- SCALABLE. Adding or reducing agents is (compared with the past) simple and cost-effective, with minimal technology impact.
- SIMPLIFIED MANAGEMENT. Moving to IP architecture can result in fewer, more tightly integrated systems that are far easier to manage than separate systems.
- INTEGRATED REPORTS. With activities consolidated within one architecture, reports can provide a more holistic perspective of contacts and customers across sites and channels.
- DISASTER BACKUP. If set up correctly, IP-based architecture and cloud-based services provide "redundancy" (backup) to ensure business continuity in the case of a natural (or other) disaster.
- OPEN STANDARDS. Systems based on open, common standards enable new applications to be integrated more easily.
- COST-EFFECTIVE. All things being equal, the costs to purchase, use and maintain IP-based systems are often lower than for the separate systems of the past.

In short, today's IP- and cloud-based services have opened up opportunity for organizations of virtually any size to build contact centers that are feature-rich, scalable, and cost-effective. When you think about capabilities that were once available to only the largest organizations now being accessible to a five- or ten-person contact center—wow, the competitive implications are very interesting!

Now, this all sounds pretty rosy, right? You may be thinking, "Great, but our organization is not 'there' yet."

I get it. Many organizations aren't there yet. For all the advantages of IP- and cloud-based capabilities, and for all the benefits that AI is beginning to deliver, many organizations still have a somewhat disjointed combination of new and old systems. I can think of several I'm working with who are, right now, in the middle of significant digital transformation initiatives, with one of the goals being to transition away from "legacy" (old) systems they've had for many years. This is not an all-at-once leap for most.

The truth is that changing systems is costly, with expenses going far beyond the systems themselves to data migration, compatibility issues, training, and the like. What you have may be working just fine for now. You and your team will need to take a good look at your current capabilities, what you require and how you'll get there. You'll need a technology roadmap.

Let's look at developments in specific areas. Some will weigh heavily into your priorities.

Routing: Getting the Right Contacts to the Right Places

The efficiencies contact centers can bring to an organization have always stemmed largely from how customer contacts are routed and distributed. Prior to call centers, the "clientele approach" was prevalent: customers tended to ask for and talk to the same representatives, whom they reached through a switchboard operator or by dialing a direct number. It was not very efficient.

When ACDs arrived in the early 1970s, they challenged existing thinking. Rather than send calls to individuals, ACDs could automatically connect calls to a group of "pooled" agents who were trained to handle a variety of customer issues. Shared computer systems and information also played important roles in this concept. In short, the "powerful pooling principle" became the core of contact center efficiency

But the pooling principle is only powerful if agents are effectively cross-trained to handle the variety of contacts that come their way. Most organizations have more than one agent group—sometimes many—geared around specific types of interactions, channels, or areas of specialized expertise. (See discussion of agent groups, Chapters 9 and 16.) In the early days of ACDs, these agent groups and other parameters were rigidly defined. You might have been able to move an agent from one group to another through a keyboard command, change the parameters to overflow calls to another agent group, or make various other changes, but the systems themselves didn't do much to help.

Today, routing and distribution is far more flexible. Customer information, agent availability, workload conditions and many other parameters can be included in the criteria. Skills-based routing, which entered the market in the early 1990s, makes it possible to route individual contacts to specific agents (see Chapter 7). Analytics and AI-driven applications can also help get contacts to the right places. The "vision" (still a work in progress for many) is for one single routing application to handle all interactions and channels across the contact center's operations.

A single routing engine does not mean that you must use universal agents ("super agents") to handle everything—that's for you to decide. Instead, the criteria you define dictate how contacts are delivered and handled. The degree to which your center is "pooled" or "specialized" depends on the criteria you establish.

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Identifying Customers and What They Need

To implement customized routing and contact-handling protocols, you'll need to know who your customers are and what they need when they contact your organization (see Chapter 7). Common identification methods include:

- Customer-entered information (e.g., into an IVR, speech system, webpage or mobile app), which can be matched to services desired or specific customer records
- ANI (automatic number identification), the number the call originated from, which can often be matched to customer records in a database
- DNIS (dialed number identification services), the telephone number the customer dials, which can indicate the reason fo the contact, language preference, etc.
- Email recipient address, subject line, sender's address or customer-entered data, which can be matched to services des or customer records
- Web address, social media name, or demographic information (e.g., location), which can be matched to services desired customer records

- TTY (text telephone) capabilities, which enable your organization to receive, verify, route and handle contacts from customers who are hearing-impaired
- Analytics and AI-enabled bots, which can decipher voice- or text-based conversations to determine the best routing optio (See GM Leverages AI in Social Customer Care.)

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Boosting Productivity and Quality

In recent years, there have been many developments that can improve contact center performance. Again, the underlying themes include architecture based on open standards, ability to integrate with other systems, flexibility, and maximum user control. Examples include:

WORKFORCE OPTIMIZATION SYSTEMS. At a basic level, workforce management systems (now generally referred to as workforce optimization systems) provide automated tools for forecasting, staff calculations, schedules, tracking and reporting. In recent years, applications have become increasingly good at handling these core processes. For example, forecasting and scheduling for the full range of contact channels, along with skills-based scheduling and user-defined reports that integrate with other systems, have supported the emerging omnichannel environment.

Administration of these systems has become much easier, with far better integration with payroll and financial systems. Integration with quality observation systems and training tools has become robust, enabling seamless forecasting, scheduling, and real-time management of virtually any contact center activity (including activity not directly related to handling customer interactions). One of the most useful developments has been improvements in modules that enable what-if analysis for budgeting and resource decisions. And the real crowd-pleaser has been empowering agents to manage their own schedules.

QUALITY MANAGEMENT SYSTEMS. At a basic level, quality management systems record interactions and enable review for quality improvement purposes. Many systems can be set up to record all interactions or a sampling of interactions. Both voice and screen (how the agent enters data) activities can be captured and, increasingly, all contact channels can be included. Integration with other systems can provide rich, three-dimensional reports on activities, help with coaching and training, and link to elearning modules that are geared around individual performance evaluations. Supervisors can insert voice annotations into original recordings for training purposes and managers can include specific contacts in reports delivered to senior management, colleagues in other departments, or others.

But the benefits go far beyond those associated with recording and reviewing contacts. Analytics—speech and text—has been a hot trend in contact centers, and for good reason. Analytics can identify problem areas, trends, and customer sentiment. This insight enables the broader organization to improve products, services, and processes (see Lutron's Insight Center, Chapter 13).

CUSTOMER RELATIONSHIP CAPABILITIES. There are many applications that can help you establish and build better relationships with customers. For example, contact management technologies enable you to log contacts, view customer profiles and access a consolidated history of all contacts customers have had with the organization, through any channel—face-to-face, phone, email, web, social media, etc.

Sales automation applications enable you to track contacts and leads with prospects or existing customers, provide scripts, schedule follow-up contacts—simply put, manage interactions. Fulfillment tools can manage the delivery of products, services, and materials. Support center systems enable robust tracking and management of issues in technical support settings.

Other tools enable you to access account histories, as well as information on billing, shipping, services delivered and related activities. Product suites and open standards can help you pull together the pieces that make the most sense for your organization and customers.

SOCIAL MEDIA MANAGEMENT. Social media applications enable you to track and observe ratings, reviews, and what's being posted across social media sites, blogs, and other platforms. They can also identify influencers—those who have the greatest impact on your reputation and brand, given the nature or quantity of their "followers."

Related applications prioritize and deliver relevant conversations to agents who can engage with customers where and when appropriate. This has been a game changer for many contact centers, enabling them to be directly involved in delivering effective service through social media channels.

ANALYTICS AND KNOWLEDGE MANAGEMENT. Many organizations are realizing that their data is the proverbial gold mine, and are turning to increasingly sophisticated tools for its gathering, storage, analysis, and reporting. Analytics APIs can pull together, distill, and analyze information from many sources. Dashboards and scorecards can integrate multi-system data with goals and objectives, to help guide decisions across the organization.

Knowledge management capabilities have seen powerful advancements, enabling the organization to create, leverage and reuse information resources so people will not spend time "reinventing the wheel." These capabilities provide a "single source of truth" that empowers agents and customers, as well enabling AI and self-service resources. This is a boon to first contact resolution, efficient handling times, and heightened customer satisfaction.

DESKTOP CAPABILITIES. The agent desktop has been a major area of development in recent years, providing access to systems, information, and media through a familiar, browser-based interface. Document imaging and on-screen retrieval can boost first contact resolution. The ability to send real-time information on contact center performance to agent desktops helps them stay attuned to trends and developments.

Auto-greetings allow agents to pre-record their introductions, so that every interaction is started with the right greeting delivered in a cheerful voice. (This also gives agents a valuable few seconds to read the information presented to them in preparation for the interaction.)

Collaboration tools help agents—or anyone else across the organization—access information or subject matter experts in other areas. When managed with the right expectations and approach, these tools quickly become indispensable. Gamification applications, when used well, can provide focus and fun to help achieve important goals.

Contact management features themselves provide increasingly customizable work states, contact coding options and contact handling capabilities (e.g., one-click transfers or requests for assistance). These capabilities can be provided on a telephone set or by "softphone" (a virtual phone) on the computer desktop.

IVR AND SPEECH CAPABILITIES. When coupled with databases and routing systems, IVR systems enable customers to access (and provide) information through keypad input or speech recognition. Visual IVRs are now available for use with smartphones.

Speech recognition has improved dramatically in recent years. By enabling a more natural interface, well-designed systems greatly extend application opportunities (it's a lot easier to say "Puerto Vallarta, Mexico" than to enter it on a keypad). Speech engines and algorithms have become increasingly robust and are able to recognize accents, colloquialisms, and expansive vocabularies. Some organizations are using voice biometrics—speech identification technology—for secure and easy customer authentication.

Post-contact surveys quickly and effectively gather information that can be tied to specific interactions and agents (see Chapter 14). And personalized applications can help deepen relationships and encourage the use of self-service options (when I call my preferred airline, I'm greeted with "Welcome back, Brad").

WEB-BASED AND MOBILE APPS. From the simple FAQs (frequently asked questions) that became common several decades ago to today's powerful multimedia applications that enable everything from financial trading to real-time flight tracking, web-based and mobile apps have forever changed the way we live and work.

The deeper impact for contact centers is in integration; these capabilities enable customers and agents to tap into the same tools and information, improving consistency and cohesiveness of services. And the important role of search—which cannot be overstated—has turned a vast, almost impossible-to-navigate universe of content into a source of immediately accessible information, content and solutions.

AI-Enabled Capabilities

Let’s turn to the hottest new development since the Internet itself—artificial intelligence. Fast-evolving AI technologies—as with earlier developments—are eliciting strong reactions. Some believe AI will largely take over contact centers, while others see it as an over-hyped sideshow to more important areas of focus.

Dr. Raj Ramesh (a friend I met through the National Speaker’s Association) is one of the clearest voices I know on AI and machine learning. He’s author of AI and You, a book he originally wrote for his children so they would understand how AI will impact their opportunities and careers. (He also has some terrific YouTube videos, easy to find by searching his name.)

The human brain is infinitely complex. As Raj points out, the real breakthroughs in AI began to emerge when scientists realized they could not replicate human capabilities in one algorithm or system. They instead focused on specific, individual capabilities of the brain—recognizing objects, understanding language, and so forth.

AI has since evolved into an umbrella term with many subdisciplines. They include (in no particular order):

PATTERN RECOGNITION. Being able to recognize patterns in data (e.g., object recognition, pattern analysis in data, and handwritten character recognition).

MACHINE LEARNING. Teaching a computer to learn so that it can respond to similar or new situations—e.g., face recognition, playing games, or predicting the weather.

COGNITIVE COMPUTING. Problem solving, which considers many facts to come to logical conclusions.

ROBOTICS. Controlling mechanical objects in a nondeterministic environment through software.

NEURAL NETWORKS/DEEP LEARNING. Replicating the neural structure of the human brain—e.g., being able to recognize objects and faces, learn new concepts, and make decisions.

NATURAL LANGUAGE PROCESSING. Understanding and responding to human language (e.g., automated phone responses and voice-driven commands).

COMPUTER VISION. Replicating human vision to recognize objects, see color, and identify visual patterns.

IMAGE PROCESSING. Processing digital images (e.g., for object and face recognition).

ASSOCIATIVE MEMORY. Replicating human memory through association (e.g., recognizing the fragrance of a flower and making an association to the place where it’s grown, or to an event that featured flower centerpieces).

GENETIC/EVOLUTIONARY PROGRAMMING. Finding improvements through many iterative stages.

These subdisciplines are not siloed—they borrow algorithms and techniques from each other. Explains Raj, “For example, to train a machine to recognize a known object such as an aircraft, we would likely use algorithms and techniques from image processing, computer vision, pattern recognition, and neural networks.”

It’s helpful to think of AI and its subdisciplines in this way, because you can then begin to find opportunities in the specific processes of your contact center. Rather than envisioning a robot taking over an agent’s role (which is very unlikely), think instead of the individual processes you’re handling:

- Determining the customer’s need
- Getting the customer to the right place
- Authenticating that it’s really them
- Retrieving required information
- Piecing together needed information
- Doing calculations and analysis
- Capturing data on the interaction
- And so on

You get the idea. It’s in specific aspects of delivering service—not taking the place of an agent—that AI is having (and will continue have) the biggest impact.

Raj makes a bold prediction: “With this technology, every aspect of business and every business will be impacted.” But he reminds us that AI is light years away from doing things that humans can do. For example, he says that in the near future:

- AI will drive cars, but won’t be able to comfort your daughter after a romantic breakup.
- AI will find answers to customer questions, but won’t be able to empathize with a customer who just lost their house in a tornado.
- AI will crunch a lot of data to identify underlying patterns, but won’t be able to figure out what kind of data to crunch.

AI is real and powerful, but many of the effective applications I’m seeing are not grabbing headlines. They are instead quietly and significantly improving operations, and agent/customer interactions. They are helping with what were laborious, manual, or piecemeal processes. And most are working in tandem with agents, enabling technology to do what it does best—and humans to do what we do best.

Many AI applications will improve over time. For example, Delta Air Lines utilizes an AI-based virtual assistant as the starting point for conversations with customers, fielding simple queries and elevating more complex issues to agents. As Tori Forbes-Roberts, Vice President, Reservation Sales, Customer Care and Digital Engagement, put it in a PYMNTS.com post, the virtual assistant “does learn over time,” so the expectation is that it will begin to handle a broader range of conversations.

Artificial Intelligence ≠ Artificial Wisdom

I believe that in contact centers, AI will end up being a powerful assistant. It will free agents to become more responsive and engaging, to create rapport and make connections in the way only humans can. Artificial intelligence is not artificial wisdom. It’s my hope that finance and technology leaders won’t get taken in by faulty business cases that assume AI can fully displace humans—as so many did when web-based self-service options came along.

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GM LEVERAGES AI IN SOCIAL CUSTOMER CARE

GM, America’s largest automobile manufacturer, has more than 17 million social brand mentions and engages in more th

400,000 customer care conversations each year. GM set (and met) two aggressive goals to support their customer-centri

Goal 1: Deliver on today's customer expectations. GM recognized that customers are increasingly turning to social channels for customer service, and established a response time objective of less than three hours. To achieve this object

leveraged AI to identify, categorize and prioritize social-driven customer care issues. From there, people take over: highly moderators assign the posts to the advisor best suited to deliver a fast, accurate, and customized response. GM also dep chatbot to handle "easy to answer" inquiries (as determined by AI) without human intervention. The chatbot also collects necessary information on "difficult to answer" inquiries before they are passed to an advisor.

Goal 2: Push the boundaries of social care. The GM team set out to connect customers with the people making their products, to uncover actionable insights and improve the customer experience. They also wanted "early detection" of any issues. GM harnessed AI to systematically mine social and digital conversations for product issues, engage the appropria internal team to fix problems, and follow up with the customers who voiced the concerns. (In one example, GM learned th some Acadia owners saw a "shift to park" message after they had already shifted to park. GM began a collaborative, inter effort to deliver the proper repair strategy to dealerships. The team also reached out to affected customers and scheduled repairs.)

GM's efforts earned them a 2019 Shorty Award in the category of Customer Service. This prestigious award recognizes companies that are using social media to enhance the experience of their customers.

Source: GM's award entry, "General Motors Social Customer Care," by General Motors & FleishmanHillard

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Customers' Technologies

When discussing technologies, many of us in the customer experience profession immediately think of what's happening on the organization's end. But really, it's the developments on the customers' end—the meteoric rise of smartphones, social media, mobility, consumer-oriented AI (face recognition, speech-driven devices, etc.)—that are the most significant drivers of progress. They are forever changing customer expectations and services.

Customers not only invest a combined billions of dollars annually to acquire devices and apps, they make the effort to learn and use them. The technology on the customer's end of the equation is just as much a part of our customer service ecosystem—even if it's not on our organization's balance sheet.

The technology on the customer's end of the equation is just as much a part of our customer service ecosystem—even if it's not on our organization's balance sheet.

Given what's happening, I'm convinced we'll see more change in the next five years than we've seen in the past few decades. We can harness and leverage the trends to our benefit, or get trampled by them.

Contact centers are communication hubs that can accommodate the many ways customers want to interact and access expertise and information. It's no small feat, but forward-looking organizations are turning this challenge into a competitive opportunity.

Seven Key Trends

What do we make of these advances? What should we—rather, must we—prepare for? I believe that the following trends are especially important.

Customers Are Better-Informed and Have Higher Expectations

The growth and expansion of search, social media communities, mobile apps, self-service capabilities, a vast range of information resources, and ever-changing cultural expectations have created better-informed, more empowered, and savvy customers. As industry pioneer (and my former business partner at ICMI) Gordon MacPherson Jr. foresaw three decades ago, "A new breed of technology-sophisticated consumers is demanding a choice of how they will be served. They often know what the choices could be, and they will become increasingly critical if you do not offer the choices they think you should offer."

It's up to you to open up and develop access and services as technologies and expectations evolve. All channels have a place. An agent won’t suffice when you want to review feedback from a diverse social media community. Speech recognition doesn’t illustrate movement in a financial market. Web-based services don’t come close to matching the proficiency of an experienced technical support agent. Your customers and their specific situations will dictate the best combination of channels, services, and technology.

"We think we invent technology, but technology also invents us.”
RICHARD FARSON

You’ll Always Need Agents—But for Different Reasons

Quite a few industry pundits predicted that advanced self-service capabilities (along with a focus on simpler and more reliable products and services) would dramatically reduce reliance on agents. More recently, I’ve heard similar predictions from observers who are looking at developments in AI. Yet, there are more agents working in more contact centers across the globe than at any time in history. The consideration missing in much of the analysis is that communications capabilities are creating new services and expectations. This is not a zero-sum game.

For those services that require the involvement of an agent, customers expect their issues to be resolved quickly and easily (see discussion of expectations, Chapter 2). This is putting a spotlight on the importance of agent empowerment. “Customers expect frontline employees to resolve problems on the spot,” write John Goodman and Scott Broetzmann in their eye-opening book, Strategic Customer Service. “This requires much more empowerment than companies are typically willing to impart. However, if you look at the cost of supervisor involvement to make a decision that will be the same 92 percent of the time, tripling the cost, it is cheaper to trust the frontline employee. Further, if you add the 10 to 20 percent drop in loyalty by forcing the customer to wait, and otherwise gumming up the works, the case for immediate resolution and trusting the frontline staff becomes compelling.”

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THE CONTACT CENTER’S ROLE IN BUILDING SELF-SERVICE

Many organizations are learning firsthand that contact centers play a central role in encouraging and supporting low-cost access channels. For example, the contact center can provide a wealth of information about which contacts can be autom handled in customer communities, and what can be done to improve customer acceptance of this type of handling. While seem paradoxical, providing agent assistance when and as needed encourages customer confidence in these alternative

Here are some things you can do to build self-service channels:

- Equip agents to educate customers on self-service options. They should be trained on the uses and advantages of these alternatives so that they can encourage customers to avail themselves of self-service options when appropriate.
- Collect and analyze data about contacts currently handled in the center. Look for opportunities to provide self-service features or to build communities that enable customers to help each other.
- Observe agents handling contacts. Your best agents really know how to serve customers; watching them work can prese many opportunities for developing and improving self-service systems.
- Involve agents in system design. Your agents should actively serve on project teams responsible for building self-service systems. They can also help monitor and test systems and interpret customer behavior and feedback.
- Integrate self-service and contact center systems. Integrated systems can enable agents to use the information captured self-service applications when they are assisting customers.
- Capture customer feedback about self-service systems. This information is essential to improving system design.
-

Enable customers to easily reach agents. If customers can’t reach an agent when they want to, they will resent being for
to use self-service systems.

- Track data from all support modes and analyze it for improvement opportunities; specifically, why do customer contacts happen? Which do you want to encourage and which do you want to prevent (as much as possible)?

If your contact center agents view self-service as a low-cost replacement for humans, they may not be overly enthusiastic
about helping to improve those systems or encouraging their use. Turn this (misconception) on its head and you’ll be corr
positioning self-service systems as an essential part of providing choices and delivering high-value services.

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Agent-Assisted Services Are Being Prioritized

Many of the contacts being handled today can be, will be and should be handled by self-service channels, emerging AI applications, and related options in coming years. This doesn’t mean that agents are, or will be, obsolete.

Consider the travel sector. Every time an airline or hotel closes a reservation center somewhere, journalists jump on the story—“Is the contact center industry in decline? Is this representative of a broader pattern?” Short answer: no. Those simple sorts of interactions needed to be automated. Most of us are happy to self-serve in booking, check-in, and flight changes. But when we do need a travel advisor, we expect to reach someone knowledgeable and empowered.

This kind of displacement has been going on for decades. In the mid-20th century, telephone companies automated the centers that “switched” calls from one location to another. There were marches in the streets to protest the hundreds of thousands of operator jobs that were to be lost.

Forward-thinking organizations are taking tangible steps to build self-service alternatives and encourage customers to use them. And leading contact centers are taking a proactive role in this effort. They are ensuring that their highly trained, highly paid agents are handling interactions that need the human touch.

Contact Centers Require Increasingly High Levels of Skill

Agents face a number of challenges as search, online resources, social media communities and self-service technologies offload relatively simple contacts, and as products and services grow increasingly diverse and complex. In addition to handling more difficult interactions, they must serve increasingly well-informed and varied customers; adjust to rapid changes in products, services, and technologies; operate in a time-sensitive, multimedia environment; communicate quickly and accurately in both verbal and written form; and understand (and be able to help customers use) technology-based services.

At supervisory and management levels, the traditional “jack of all trades” roles are being divided among specialists doing, among other things, data analysis, scheduling, quality observation, and coaching. Some organizations have created contact center application specialists, who interact directly with IT or suppliers. Evolving technologies are powerful and enormously flexible, but they are contributing to the emergence of specialized managers with the expertise to understand, manage and maintain those technologies.

An undeniable trend fueling further complexity is the addition of new channels and combinations of channels. While the core principles of effective management are timeless and universal, the operational specifics vary from one channel to another (see Chapter 7). And requirements at the agent level vary, even though the products and services being supported are similar. Phone, chat, text, video, and different social media platforms present nuances in cultural expectations and skill requirements.

Organizations Are Being Redefined

Many organizations are restructuring so that the customer experience is viewed more holistically, and so that all touchpoints are approached cohesively (see Chapter 16). This can necessitate significant internal structural change that involves IT, marketing, HR and virtually every other department.

Job roles are changing along with organizational structures. Many organizations are also establishing an overall head of customer experience. As discussed in Chapters 13, 14 and 16, it is increasingly important that organizations invest in employees and provide attractive skill and career paths. Many organizations are also becoming more broadly-based. Multi-site centers and agents based at home have increased in number significantly in recent years.

Perhaps the most notable current development is digital transformation, which involves much more than integrating technology into all areas of the organization. It's also a cultural change that requires organizations to fundamentally rethink how things are done, and how to create value. I agree with Donna Fluss, head of DMG Consulting, when she cautions: "We're in the period of digital transformation, but surprisingly, contact centers are sometimes left out of these initiatives. Eventually, someone reasonable comes along and points out the necessity of including the primary customer-facing department in the digital transformation."

We're Just Getting Started

As advanced as some technologies have become, many are still in their infancy.

Omnichannel is here to stay, and the distinctions among phone, chat, browsing, dialogue through social media channels, and video will blur—they'll all just be conversations. We communicate best when our senses work together. Think about these ingredients, and ponder ways they can be combined:

- Mobile
- Social media
- Virtual
- Artificial intelligence
- Interactive
- Information
- Multimedia
- Network
- Community
- Virtual reality
- Engagement
- Experience

These components will continue to be mixed and harnessed in numerous, yet-to-be-imagined ways. And the latest technology won't be on customers' minds. They just want things to work and to be easy. They want services that are reliable, intuitive, accessible—even enjoyable—to use.

Clear Business Thinking Is More Important Than Ever

New technologies are not passive—to get good results, they must be implemented with foresight and good planning. Take, for example, skills-based routing. Remember how it was supposed to solve scheduling and staffing problems? And yet, many contact centers have taken a few steps back from the most involved types of skills-based routing, having been unable to achieve the efficiency and effectiveness they had with pools of cross-trained agents. It turns out that it’s like hot pepper sauce—a little bit goes a long way, and the use and context must be precise.

Similarly, today’s open and highly customizable systems offer wonderful flexibility, but (stating the obvious here) they need to be programmed to do what you want them to do. Clarification and definition of the underlying business rules is an ongoing challenge for any organization. And that has a lot more to do with clear business thinking than a specific technology capability. The late Peter Drucker contended that the most important impact of information technology is not the capabilities of the technologies themselves, but that these systems force you to organize processes and information more logically.

Author Emily Yellin once summarized the opportunity this way: “Our billions of everyday transactions are both simpler and more complicated than they appear. But while the infrastructure that supports them is continually in flux, the intangibles at the heart of each positive encounter remain constant on all sides: trust, respect, empathy, caring, and even some fun—within companies, and between companies and their customers.”

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THE BUSINESS CASE

A helpful way to consider the business case for contact center technologies is to broadly categorize the benefits in four areas:

Foundational, required to support the contact center’s mission and strategy. Example: routing systems that enable the organization to identify and deliver to agents the full range of customer interactions.

Legal, necessary to comply with requirements or minimize liability. Example: recording systems that enable interactions t be captured and stored for a defined period of time.

Return on investment, where potential benefits exceed costs based on the organization’s accepted ROI approach (e.g., payback time, return on capital). Example: desktop capabilities that enable agents to access needed information more qu reducing handling times and boosting first contact resolution.

Intangible, providing benefits that are more difficult to quantify but are believed to be worth more than the cost. Example: improvements to facilities that create a more pleasing work environment. (Note that in many cases, these investments ca estimated by looking at factors such as performance and turnover.)

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Leadership Is Essential

Effective leadership in this time of intense change requires a multi-faceted approach, and some recommendations come to mind:

1. Keep focused on your overarching objectives. The purpose of any new technology should be to support the governing principles and mission of your organization. Keep it simple—don’t over-complicate applications to the point that they are ineffective or unmanageable. When complexity begins to throw things off course, go back to the basics. Stay focused on what really matters.
2. Remember that new capabilities both depend on and dramatically affect (among other things) training, policies, planning, budgeting, and other systems. Those who take a holistic approach to planning and implementing systems, and who put adequate thought into process- and people-related issues, earn the highest returns on technology investments.
3. Recognize that just about any technology can be viewed as a double-edged sword. For example, quality observation capabilities can be sources of stress for agents. Or they can be used to identify improvement opportunities and coach agents to higher levels of performance and job satisfaction. Similarly, reporting tools that give people outside of the department access to contact center information may bring unwanted attention. Or such tools may be a boon to the interest level (and support) the contact center receives from other parts of the organization. Ensuring that others have an understanding of technologies and how they will be used is key.
4. It’s essential to develop a sound customer access strategy and use it to guide decisions (see Chapter 2). As you view technology possibilities though the lens of your customer access

strategy, some key questions will surface, such as: Which technologies best support your plans and direction? How will processes need to change? What impact will the technology have on agent requirements, both in staffing numbers and skills required? What impact will it have on your cost structure—expenses and revenues? How will overall service be improved? How technologies are implemented, supported, and used is as important as the capabilities of the technologies themselves. The answers to these and related questions will help you make wise investments, and ensure that technology is being led by your mission and direction—not the other way around.

5. In a theme that has run throughout the book: Contact center leaders have the responsibility to evaluate how technology can add value to the organization and customers, and build that into their business case. What impact will new capabilities have on customers, agents, other employees, or business functions? What are the benefits, and the returns on those benefits?
6. Inaction is the worst action you can take. Given the pace of change, it's important to now decide on and map your contact center's migration into the future.

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Points to Remember

- Advanced contact center technologies are creating enormous opportunities for better serving customers, empowering agents and increasing efficiencies and effectiveness.
- Technologies are not passive. They are changing customer behavior, leading to significant reallocations of resources and impacting the responsibilities of agents and managers.
- The key trends currently in motion provide a framework for understanding the changes taking place and preparing your contact center for tomorrow's environment.
- New capabilities both depend on and have dramatic impact on training, policies, planning, budgeting, and many other issues. Effective leadership is essential to getting the most out of your technology investments.

Chapter 16: Building a Customer-Focused Organization

"Basically, managing is about influencing action. Managing is about helping organizations and units to get things done, which means action."

HENRY MINTZBERG

As in the system of roads in a metropolitan area or the design of a boat's hull, the forces of your organization's structure and operating principles are constantly at work. A well-designed organization will enable your contact center to be adaptable and effective. When the organization is poorly designed, it will hamper communication, create barriers to effective performance, and lead to unsustainable workarounds.

In this chapter, we'll look at some of the most important aspects of building a customer-focused organization, including:

- The principles of effective structure
- Job roles and responsibilities
- Span of control (i.e., agent-to-supervisor ratio)
- Establishing career and skill paths
- Customer-focused culture
- The highest level of leadership

The Principles of Effective Structure

There is a paradox in play in many organizations. The organizational design is constantly exerting its forces as it channels communications, shapes protocol, and establishes lines of authority. It is one of the most influential and “visible” aspects of any enterprise. And yet, in the daily hubbub, it somehow becomes almost outside the realm of managerial consciousness.

All contact centers undergo constant refinements as they strive to meet variable workload demands and new content and channel requirements. An effective organizational design is essential for the success of these efforts.

Although some aspects of organizational design are similar from one contact center to the next—i.e., the basic components illustrated in the figure are present in most organizations—there are as many unique designs as there are organizations. Even so, there are consistent principles at work behind any effective design. These include the following:

THE ORGANIZATION’S VISION, AND STRATEGY DRIVE STRUCTURE.

Organizational design is a strategy to help the organization reach its objectives; design helps translate strategy into operations. Answers to major questions, such as the contact center’s role in customer experience, to whom the center reports, and how the center will be positioned relative to other service delivery methods (e.g., the field sales force or physical locations), must flow from the highest strategic levels.

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THE IMPACT OF ORGANIZATIONAL DESIGN

Organizational structure (also called organizational design) provides the alignment of roles and responsibilities for busine units, departments and individuals. There are many reasonable definitions of organizational structure, but almost all refer the division of labor and the coordination of responsibilities and tasks. Major issues defined or affected by organizational include:

- The contact center’s position in the larger organization
- The contact center’s role in relation to other channels of service delivery (such as retail locations or field sales and servic operations)
- The contact center’s overall mission and responsibilities
- Specific job roles and accountabilities
- Lines of communication and authority
- Agent group structure
- Analyst and support positions
- Ratios (e.g., staff-to-supervisor)
- Number of sites and level of integration
- Process, technology and facility requirements
- Budget allocations

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INFORMAL AND FORMAL STRUCTURES ARE WELL-ALIGNED. The formal structure is the one defined by organizational charts and in position and process descriptions. The informal structure is how things really function. I've run into a number of cases over the years where contact centers had grown their own ad hoc training and technology support functions (e.g., "Hey, Christine can do that … let's ask her.") because they weren't getting timely support from other areas. If that's the case in your organization, it's time to sit down with people in those other areas and discuss what the contact center needs.

Organizations are complex, and there will always be some degree of informal communication and workflow. But when an informal structure becomes ineffective, it's important to re-examine the formal structure, as it could be the true source of the problem. Just as great sports teams define positions around natural talent and abilities, formal structures should flow efficiently along natural lines of authority and responsibility.

* * *

STRATEGY DRIVES STRUCTURE

Many contact centers have been through consolidations or restructurings that are really just cleanup efforts because they

lacked an effective customer access strategy. For example, I helped an insurance company with agent group "consolidati
Their sales team would sell an account to a major client and, if pressed, would agree to provide a dedicated agent group.
each sale, the contact center would be left to figure out how to provide those dedicated resources.

The center pooled agent groups whenever possible, but they eventually reached the point at which they faced the near-
impossible task of managing numerous agent groups, routing plans, overflow contingencies and access numbers. The pu
the consolidation plan was to get a handle on all of the available access numbers and routing plans, and combine and si
much as possible. It was a painful effort, driven by decisions made in the absence of an overall plan. The contact center a
teams now work from a common plan—leading to a cleaner and more effective organization, one that delivers far better c
experiences.

* * *

AGENT GROUPS FORM THE FOUNDATION OF CONTACT CENTER STRUCTURE.

Once the contact center's place in the larger organization is defined, it should be built from agent groups upward. (Recall from Chapter 6 that agent groups share a common set of skills and knowledge, handle a specified mix of contacts, and can comprise a small number of agents in a single location, or hundreds of agents across multiple sites.)

In an ideal world, every agent in a center would be equally proficient at handling every type of contact through any channel, speak all required languages, and maintain the company's branding and image for every customer segment. That, of course, is not realistic in most environments—thus the tiered groups, skills-based routing and other alternatives that centers use to get the right contact to the right agent at the right time.

Here's the point: Everything—hiring, training programs, supervisory and management responsibilities, analyst activities, quality standards, workforce planning, you name it—is based on agent group structure. But as agent group requirements evolve, those supporting functions can become outdated. This is an issue that requires regular review. In light of your current agent groups, redefine the responsibilities of your analysts, bring supervisor ratios into sensible alignment, and rethink your training and development programs.

* * *

ARE YOUR AGENT GROUPS TOO POOLED? TOO SPECIALIZED?

There is no formula for deciding how pooled or specialized agent groups should be. However, the symptoms of groups th
are too pooled or too specialized are usually evident.

Symptoms of over-specialized agent groups:

- Small groups with low occupancy and/or erratic service level/response time results
- An overly complicated planning process
-

- Many contacts not handled by the intended group (e.g., due to overflow or reassigned agents)
- Agents frustrated with narrow responsibilities

Symptoms of over-pooled agent groups:

- Customer interactions have a higher handling time than necessary as agents grapple with a broad range of issues
- There is a high number of transferred or escalated contacts
- Training time is relatively long
- Quality suffers
- Agents are frustrated with “too much to know”

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DIVISIONS AND RATIOS ARE SUPPORTED BY THE HIGHEST PRIORITIES.

Any team, agent group, functional area, or location (unless networked seamlessly to other sites) is defined by dividing lines, and divisions should be justified by the highest priorities and continually reviewed.

For example, after much analysis, a government organization decided to combine dozens of small, localized contact centers into a few larger, regionalized centers. They determined that overall service to constituents was a higher priority than satisfying the interests pushing to keep the jobs in each local community.

In another example, a high-tech company with 24/7 technical support combined several daytime groups into a pooled group at night, which was equipped to handle a broad range of interactions. Although average handling time increased, quality remained consistent with daytime service. The organization (wisely) decided that the ability to reach a capable and fully-trained agent—even if they needed a bit more time handling the contact—wins out over maintaining small, specialized groups in the wee hours of the morning.

REPORTING ARRANGEMENTS ASSIGN APPROPRIATE ACCOUNTABILITIES.

There are situations in which the contact center is dependent on people in other areas that have different (or even competing) interests. Yes, everybody is ultimately on the same team. But when contact centers are being judged on their ability to handle a changing workload, the IT/telecom department is intent on operating within a reconfigured budget, and marketing is being assessed on response rates … that can cause problems.

The answer? Sit down with colleagues across areas and identify objectives and accountabilities that could be in conflict. Maybe the training department should report to the same area as the contact center, or to the contact center itself. (And maybe some other support functions should be brought under the contact center umbrella.) Maybe some expenditures that are spread across the IT, marketing and customer service budgets should be combined. Answers begin to emerge when an open and honest needs assessment takes place.

SUPPORT POSITIONS ARE ENABLERS. Roles geared around ensuring compliance, establishing rules, and creating exception reports are often counterproductive. Alternatively, creating better processes, facilitating collaboration and, in general, supporting and enabling the contact center’s highest values will contribute to overall success. Those in support roles must find a good balance between burdensome control and an organization so loosely managed that it loses effectiveness.

THE STRUCTURE FACILITATES BRANDING. The organization’s desired image, how it wishes to define and serve customer segments, and the specific requirements of individual customers should drive objectives that span the organization’s marketing efforts, the products and services it provides, and the contributions of the contact center. While that doesn't (necessarily) mean that separate divisions or agent groups within the center are required to serve different customer segments, it does mean that divisions, groups, and responsibilities should advance branding requirements.

In a common example, many organizations are implementing customer experience initiatives designed to break down historical silos and provide a unified focus on customer needs. An important aspect of these efforts is better coordination across functional areas.

THE ORGANIZATION IS DESIGNED TO BE NIMBLE. Finally, in a theme that runs throughout this book, the contact center should be designed and managed to be as scalable and flexible as possible. There are many considerations covered in prior chapters that go into creating a nimble organization:

- Having a thoughtful and current customer access strategy (Chapter 2)
- Establishing an accurate planning and management process (Part Two)
- Ensuring that everyone understands important contact center dynamics (Chapter 9)
- Building budgets that match requirements (Chapter 10)
- Implementing an appropriate approach to real-time management (Chapter 11)
- Establishing the right objectives and metrics (Chapters 12 and 14)
- Continuously improving processes and quality (Chapter 13)
- Harnessing technologies that enable and empower the organization (Chapter 15)

Job Roles—Emerging, Evolving

An important part of developing an effective organization is to identify the positions you'll need and the responsibilities that will go along with each. The table below provides a look at how job titles and responsibilities can be defined in a larger contact center.

Large centers tend to have more specialized roles and illustrate how responsibilities can become more specific. Smaller centers often combine some (or many) areas of responsibility when creating positions. In some of the smallest centers, the manager may wear most every hat —including acting as an agent at least part of the time.

A glance through these roles and responsibilities underscores an important trend: from supervisors on up, management-level job roles are becoming increasingly specialized. Consider workforce management, and the emergence of forecasting, scheduling, and real-time management expertise. Similarly, quality initiatives depend on observation and coaching, program design, calibration, and data analysis. Technology can also lead to specialization, such as specific positions dedicated to managing or supporting speech or IVR, desktops, analytics, networks, quality observation systems, social media tools, or workforce optimization. (If you manage or support a small center, you may still take on many of these responsibilities.)

Interestingly, at the agent level, job requirements are becoming more generalized. Agents must increasingly understand the access channels customers use, the interrelated nature of services the organization provides, and the scope of customers' needs and expectations.

Clearly, running a successful contact center is, more than ever, a team sport.

Additional quality, technical support, routing management, scheduling and other roles exist in some centers. And a host of roles might also be involved in customer experience—customer advocates, liaison roles, and an overall chief customer officer (CCO) or head of customer experience at the executive level.

I have a file—it used to be physical and is now primarily electronic—of hundreds of organization charts. One day, I realized that there are as many unique structures (and combinations of job roles) as there are organizations. My advice as you review your organization and roles: be intentional, keep it simple, and stay focused on what's best for your customers.

Clearly, running a successful contact center is, more than ever, a team sport. The most successful centers cultivate training and development programs that deliver specific skills and knowledge while reinforcing overall objectives.

They also turn the challenge of managing multiple generations on its head. Fancy Mills, group training and content director for ICMI and HDI, has studied generations in the workforce extensively, and she puts it this way: "The strongest organizations embrace the talents and perspectives that employees from across four generations bring to the workforce. Given the diverse customers that we serve, this is must—but it's more than a must; it's an amazing opportunity!"

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Example Job Roles and Responsibilities (Large Contact Center)

Agent

- Serve as ambassador for the organization
- Identify and handle customer inquiries
- Apply customer service policies
- Perform business retention activities
- Resolve customer problems
- Educate customers on products and services offered
- Match product benefits with customer needs
- Capture important customer insight
- Enter coding and tracking information
- Further customer relationships

Team Leader/Supervisor

- Resolve agent and customer issues
- Participate in new-hire interviews
- Conduct performance reviews and team meetings
- Help to handle the workload (when feasible and appropriate)
- Conduct observation and coaching sessions
-

- Coordinate with training and quality assurance to identify systemic improvement opportunities
- Represent the team on special projects/initiatives

Technical Support

- Recommend technology solutions
- Maintain existing software/hardware
- Install technology systems and upgrades
- Provide technical assistance to operations
- Help to update contact-routing systems as needed
- Troubleshoot technical problems
- Plan and schedule system backup/outages to minimize customer impact

Workforce Manager

- Spearhead the contact center planning process
- Ensure key planning concepts are understood by the entire organization
- Ensure contact center and staffing models include accurate, updated information
- Conduct meetings with relevant departments regarding forecast and workload requirements
- Research and recommend vendors and applications for forecasting and scheduling activities
- Train team leaders, managers, and trainers on the use of workforce optimization tools (e.g., work modes, schedule adherence)
- Provide executive management with reports on workload trends and staffing requirements
- Establish parameters that empower agents to self-manage schedules as possible

Workforce Analyst

- Determine agent schedules to meet contact center objectives
- Develop reports on daily workload
- Participate in forecasting meetings with relevant departments
- Develop accurate short- and long-term workload forecasts
- Control master databases with schedule information and shift preferences
- Serve as initial contact point for issues regarding schedules

- Facilitate day-off requests and schedule changes
- Determine workforce requirements to meet service level and response time objectives

Workforce Real-Time Analyst

- Provide intraday monitoring and reporting
- Recommend real-time schedule changes and identify efficiency opportunities
- Adjust schedules based on workload/forecast shifts
- Update systems with real-time shift adjustment information
- Develop real-time summary reports and distribute to management team

Training Manager

- Work with operations and HR to determine new-hire and ongoing training needs
- Develop or buy appropriate training courses; implement programs
- Determine best methods of delivery
- Create training program evaluations and update/improve training accordingly
- Partner with operations and QA to identify performance gaps, calibration requirements and required training resources

Quality Assurance Manager

- Recommend, implement, and monitor the components of the quality program (e.g., record and review, side-by-side, analytics)
- Work with managers, supervisors/team leaders, and training to calibrate QA processes and results
- Research and recommend vendors for automated processes
- Gather, assess, and distribute results
- Align internal QA observations with external customer feedback

Contact Center Manager

- Implement contact center strategies and tactics
- Establish agent and team objectives
- Work with the workforce management team to ensure accurate staffing and scheduling
- Work with supervisors/team leaders, analysts, and support positions to establish and manage priorities
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- Coordinate with VP/director and other managers to monitor budget requirements and compliance
- Conduct supervisor/team leader performance reviews
- Provide on-the-job training and mentoring
- Oversee recruiting, hiring, and training processes
- Observe coaching sessions and provide feedback that develops supervisors to be better coaches
- Ensure that leaders in other parts of the organization understand the role and strategic value of the contact center

Vice President/Director

- Collaborate with senior-level management to determine the strategic direction of the contact center
- Align contact center objectives with the organization and customer objectives
- Oversee implementation of strategies
- Develop and manage budgets; secure required resources
- Maximize and communicate the contact center’s return on investment
- Oversee recruiting, hiring, and training of managerial staff
- Conduct performance reviews of managers
- Champion the contact center throughout internal and external channels

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Span of Control

Span of control refers to the number of individuals a manager supervises. A large span of control means that the manager supervises many people. A small span of control means the manager supervises fewer people. Span of control tends to decrease as the complexity and variability of the conditions in the environment increase.

Agent-to-Supervisor Ratios

In contact centers, the agent-to-supervisor ratio is an especially important consideration. Effective ratios are dependent on the tasks, standards and responsibilities of both agents and supervisors. Many centers have between 8 and 12 staff per supervisor.

However, there are notable differences by industry. For example, agent groups handling complex financial or insurance issues tend to be on the low end of that range (with more supervisors managing fewer agents), while retail companies and reservations centers tend to be on the higher end. Technical support centers can have as few as five staff per supervisor. Even within an industry, there can be a wide variance (one well-known retail company has several dozen agents per supervisor—not a number I recommend—while another has 10).

Be careful about drawing quick conclusions based on these figures or industry benchmarks. There are no simple answers along the lines of, “If you are a such-and-such type of contact center, you ought to have X staff per supervisor.”

Some of today’s trends are working to drive the span of control up, including:

GROWING WORKLOADS. In some sectors, contact center workloads have consistently increased. In those centers that struggle to keep up with growth, the span of control tends to increase.

BUDGET CONSTRAINTS. As organizations go through restructurings and/or budget cutbacks, they often must reduce the relative number of supervisors, which increases spans of control. Many senior managers admit that a downward adjustment of span of control would be ideal but say that funds are simply not available for more supervisor/manager positions.

GROWTH OF TEAMS. A positive development has been the growth of team-based environments, which has challenged the traditional role of supervisors. Contact centers have largely moved toward organizations that are flatter and more team-oriented. In many cases, team leaders are assuming functions that traditionally have been the domain of managers and supervisors.

LOWER TURNOVER. Another positive development is that a growing number of centers are directly and successfully reducing turnover. As the average experience level of agents moves upward, less supervision is generally required.

Conversely, there are other developments in today's environment that tend to drive span of control down, including:

THE GROWING COMPLEXITY OF CONTACTS. As better technologies offload routine contacts, and as new contact channels open up and expand, agents are handling interactions that require more human savvy and know-how. The growing complexity of the work tends to necessitate more coaching and feedback delivered by supervisors and managers.

MORE OBSERVATION AND COACHING. Many contact centers are employing more robust observation approaches and taking larger samples for coaching and development than in the past (see Chapter 14). Observations, feedback, and coaching take a significant amount of management time.

HOURS OF OPERATION. Hours of operation can be a subtle but significant factor. Many organizations maintain a minimum number of supervisors, even during off-hour shifts that require proportionally fewer agents.

MORE SMALL CONTACT CENTERS. This may be the biggest reason that the average span of control across the industry has moved down—there are simply more small groups. For example, if a new contact center has only seven or eight agents, it will likely have a supervisor even though that person will be able to supervise more people as the center grows.

There are other factors that can confuse the span-of-control issue. For example, team structures vary widely from one organization to the next. Some utilize "lead agents" (team leaders) who provide support and guidance to agents while also handling contacts (this can lead to an increased span of control). In other organizations, supervisors are highly involved in strategic management responsibilities, which leads to a lower span of control. Additionally, the time that supervisors spend observing and coaching (generally the most time-consuming activity beyond handling contacts) can vary greatly. And many organizations have set up support teams to field inquiries from agents who need technology-related help—a responsibility previously handled by supervisors.

Recommendations in business literature vary from "train them, empower them, and get out of the way" on one end of the spectrum, to a more structured approach on the other. In their classic book, Executive Leadership, authors Elliot Jacques and Stephen D. Clement mince no words: "There is more nonsense centering around the topic of span of control than around nearly any other subject in the whole field of organization and management." They go on to criticize managers who search for "easy-to-apply rules of thumb that need no thought."

This is applicable to the contact center environment, as well. While somewhere between 8 and 12 agents per supervisor makes sense in many centers, a 5:1 or 20:1 ratio may be equally justifiable. I always get great insight when I ask agents themselves: Are you getting the support you need? What ratio would make sense for you and others who are part of the team?

Supervisor-to-Manager Ratios

As to supervisor-to-manager spans of control, ratios of between 5:1 and 12:1 are typical. Given the higher-level and more complex interactions that must take place between managers and supervisors, spans of control are usually smaller than those between agents and supervisors. This underscores a principle generally true in most organizations: the higher up in the organization, the smaller the span of control.

Establishing Career and Skill Paths

There are two general options for formal employee advancement: career paths and skill paths. A typical career path model requires the development of job families, which comprise a number of jobs arranged in a hierarchy by grade, pay, and responsibility (e.g., agent, team leader, supervisor, manager, senior manager, and director). The career path also outlines the requirements for each job within the family: education, experience, tenure, knowledge, skills, behavioral competencies, and so on.

Because the historical corporate ladder approach to staff development can be limited for contact centers (due to the finite number of supervisory and management positions available), a more effective approach may be the skill path model. Skill paths focus on an individual's acquisition of skill sets. Individuals often receive more recognition, responsibility, and compensation as they achieve new skill levels within their position.

Contact centers, perhaps more than any other part of the organization, require diverse skills. Customer experience, information systems and technologies, queuing theory, forecasting, statistics, human resources management, training, written and verbal communication skills, reporting, real-time management and strategy are all components of the environment. Developing attractive career and skill paths is a significant opportunity to recognize the knowledge, skills and accomplishments of contact center staff.

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THE CLIO PATH

Happy agents make happy customers. Right? That's what the team at Clio—which provides practice management softwa for law firms—believes and lives. "The Clio Path" creates a clear and concise roadmap for development, says David Perr customer support manager, in an interview published in ICMI Contact Center Insider. "It encourages professional develop project management, and improvements to departmental procedures."

Dubbed "The CX Roadmap to Clio Success and Beyond," all new employees work with their supervisors to complete a detailed (11-page!) career roadmap worksheet. Employees are instructed to work at their own pace, and to take ownersh action items that result. There are five steps to the process:

Step one involves self-discovery assessments. Employees are asked to map out where their career has taken them so fa evaluate the highs and lows, and to consider their aspirations.

Step two is refinement, intended to help employees narrow down their development goals. During this stage of the progra they're encouraged to meet with colleagues in other departments and learn more about their day-to-day responsibilities. T asked to meet with potential mentors outside the organization, and to write down skills and resources they'll need to adva their career.

Step three is exploratory, documenting key takeaways and goals.

Step four requires employees to set their own personal development goals and tie them to deadlines and KPIs. For exam "By 2021, I'd like to be a thought leader in the customer experience space." Steps/KPIs:

- Speak at one customer experience conference by mid-year 2020
- Complete online CX certification course by the end of 2020
- Contribute four thought leadership articles to industry publication by the end of 2020

Step five is execution. Team members identify an accountability buddy and share their goals and next steps. Throughout process, employees meet regularly with their buddies to discuss any problems and receive candid feedback.

The results? "Our healthy attrition (internal transfer) rate sits at 18%," says Perry. "Even the external turnover is positive i its own way—we have had contact center staff that have left Clio to go back to school with the express goal of returning t company." Clio enjoys a 97% satisfaction rate, and—icing on the cake—recently won ICMI awards for best contact cente culture and most innovative service.

Source: Interview with David Perry, in ICMI's Contact Center Insider newsletter

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Customer-Focused Culture

I recall a new restaurant with great food and impeccable service that quickly built a following. Referrals spread rapidly, reviews were positive, and before long, the waits to get in became longer. To customers, this was just confirmation the restaurant was a great choice. But over time, the food became less predictable, the service less consistent. They became complacent. And the word of mouth that was working for them began to work against them. In less than two years, they were out of business.

Can this same complacency happen in contact centers? Of course—but you can avoid it and instead build a culture that is fun, focused, and passionate about the customer experience. What do organizations with the most customer-focused cultures have in common? Here are some traits that really stand out:

THEY ESTABLISH A UNIFYING VISION. As discussed throughout the book, a vision and supporting strategy that pulls everyone together is critical (see Chapter 2). In The Service Culture Handbook, Jeff Toister states it well: "A customer service vision is the cornerstone of a customer-focused culture. It acts as a compass to get every employee pointed in the same direction."

THEY HIRE THE RIGHT PEOPLE. I had a successful customer service leader put their approach to me this way: "We hire the passion and train the skills." I agree with this approach—while it makes sense (when possible) to recruit employees who have the skills you need, a drive and passion to help customers is a must-have in contact centers.

THEY PUT THEIR EMPLOYEES FIRST. Southwest Airlines, one of the world's most admired companies, states on their website that "In our 'order of importance,' we put our Employees first, then our Customers, then our Shareholders … We believe that, if we treat our Employees right, they will treat our Customers right, and in turn that results in increased business and profits that make everyone happy." They also empower employees to make real-time decisions (see discussion in Chapter 11). You can't expect them to be effective unless they have the authority and means to help customers.

THEY COMMUNICATE EFFECTIVELY. Effective leaders at all levels, whether CEOs or supervisors of a group, keep their teams in the know. Good or bad, nobody is second-guessing or wondering. Effective leaders listen, intently and often. And they celebrate successes along the way.

THEY KEEP THE FOCUS ON CUSTOMERS RATHER THAN INTERNAL OBJECTIVES. A large cable company with a mixed reputation for service (that they are working hard to change) recently took the symbolic step of putting an empty chair in every planning meeting, to represent the customer. Those involved say it really means something to have a tangible picture of a customer sitting in those discussions. It's beginning to have an impact. (A utility goes even further—they bring in customers to talk to new customer service agents, and tell them things they like and things they would change about their experiences.)

THEY ESTABLISH GOALS AND OBJECTIVES THAT SUPPORT A CUSTOMER-FOCUSED CULTURE. Here's a non-contact center example I witnessed recently. A chain of hardware stores that set "the number of customers served" as a key performance factor realized they were missing opportunities. As they learned, the employee who points to the aisle where the wrenches are is not nearly as effective as one who walks the customer to the aisle, asks whether they have an Allen wrench to install the part they requested and, in the process, discovers that the project is part of a larger remodel. With a renewed focus on customers (and retooled performance metrics), this chain is seeing both customer satisfaction and business returns improve.

Let's look at some additional aspects of building customer-focused cultures—ones that also include the broader organization.

Your Organization's Personality

Motorcycle company Harley Davidson has incredibly loyal customers. Riders join clubs and wear Harley clothes, and some even have Harley tattoos. Many CEOs and chief marketing officers point to Harley as the holy grail of customer loyalty, and wonder what they can do to be more like Harley.

The answer: don't be more like Harley. Be more like you. Connect with your customers in your own way to build excitement that is unique to your brand. Here are two examples.

- Northwestern Mutual, the U.S.-based financial services company founded well over a century ago, has built a reputation for stability. Their customer service is professional and effective. "Thank you, Mr. Cleveland. Enjoy the rest of your day."
- MOO is a fast-growing London-based design and printing company. They encourage their team to (in their words) be passionate, lovely and ambitious. Their approach, like the company name, is more playful: "Have an awesome day, Brad!"

In both cases, these companies' unique personalities shine through—and it would create very odd customer experiences to swap their styles of service!

I'm sometimes baffled to hear plodding phone menus (the monotone "press one for customer service"). And I don't get service policies that are immediately overridden when customers plead their case to managers. It doesn't have to be that way. Those are not best practices.

I recently stayed at a resort hotel with my family on a short weekend break. We arrived on a hot Saturday evening, and my engine light came on as we pulled into the entry area. I mentioned the light to the parking attendant and he replied, rather brusquely, "If you have car trouble you need to move. We can't have your car sit here." No empathy, no suggestions on where I should go.

I later mentioned this encounter to a manager. She was visibly embarrassed, saying, "That's not our brand." Her concern in those few words was genuine and heartfelt, and I have a feeling they'll reshape the coaching and support they give their employees, to ensure their brand's personality shines through from the very first hello.

Customer Advocacy

Customer advocacy is a hot topic in marketing and customer service circles, and for good reason. It can be a powerful part of building a strong brand and creating great business results. But what is it and how do you tap into it?

If you do a search for customer advocacy, you'll find two very different definitions. One is an internal perspective: focusing the organization on doing what's best for customers, creating great experiences. The other is external: customers advocate for us, spreading the word about our products, services, and brand.

Which is correct? Both! Well, both are half correct. Let's put them together. We can define customer advocacy this way: "Customer Advocacy consists of the actions we take to focus the organization on doing what is best for customers, which, in turn, rewards us with loyal customers who advocate for our products and brand."

Customer advocacy can play out in small and big ways:

- It can help guide individual interactions. The reservation agent mentions to the customer that an earlier flight would save them $175.
- It can be the catalyst to more involved decisions, such as keeping your contact center open on weekends to match customer preferences.
- And it can be the driver of dramatic change. When the late Steve Jobs returned to Apple and revived its sagging revenues, he eliminated some products in which the company had invested heavily and focused on others that were aligned with customer needs. He said, "You've got to

start with the customer experience and work back toward the technology—not the other way around." That is customer advocacy at work.

Customers are advocates when they positively promote your products and brand. Brand advocates, as they are often called, bring much value to the organization. A McKinsey study found that word of mouth drives 20–50% of all purchase decisions. And according to Bain & Company, customer advocates spend two times more than other customers, and because they stay longer, have a customer lifetime value five times greater.

Turning customers into brand advocates requires adherence to solid principles. The first and most important: don't forget the real reason you have loyal customers in the first place. Solve problems for them and serve them well through great products and customer-focused service. Ensuring that this happens should be a key focus of customer service leadership.

Second, make sure your contact center is in the game—that it's interacting with customers "where they are." A colleague who recently shopped online for a blender found the choices initially overwhelming. What swayed her was that one manufacturer had responded to every low or mediocre rating with an offer to help. Their comments were right there below the reviews. Many of those same customers later posted very positive updates. She went with the brand that was engaged.

Third, involve the rest of the organization. Here's an example: UL, a large company providing safety testing and certification services, got inspired to capture on-the-fly feedback their employees were hearing from customers every day. They created a simple feedback form inside their CRM system. The link can be accessed quickly by any employee at any time. They can easily pull up the form from a mobile device and enter the customer's feedback in real time. Nate Brown, who spearheaded the effort, says, "This has been a complete game changer in how well we understand our customers." UL also has a robust process for analyzing and acting on feedback captured.

Employees in any department love having a dedicated channel for customer feedback—if it's easy to use. And in challenging situations, they can confidently tell customers, "I appreciate your feedback, and I will pass this on to our team." A main takeaway that UL and others have learned: true omnichannel goes beyond just integrating channels in the contract center. It involves an organization-wide focus on customer experience, facilitated by governance that supports seamless and consistent service.

True omnichannel goes beyond just integrating channels in the contract center. It involves an organization-wide focus on customer experience, facilitated by governance that supports seamless and consistent service.

Fourth, encourage customers to write reviews. I bought a new pair of sports headphones recently, and received an email from the company founder. "We're passionate about providing great products and service," he said. It included the company's contact information (access to the contact center) and encouragement to reach out with any question or issue. "Oh, and if you like your new sports headphones, would you be willing to provide a testimonial?" It was genuine and effective.

Finally, for your most active brand advocates, consider a more involved level of engagement, such as VIP, loyalty, or inner circle programs. Recognize them, engage with them, and make them your "eyes and ears" for new ideas and innovation opportunities. LEGO engages with its customers through design contests, robotics challenges, and fun stories on Facebook and other sites that introduce new products. (For some additional compelling examples, go to YouTube and search for Red Bull, GoPro, or Patagonia to see how they engage with biking, surfing, and other sports communities, earning tens of millions of views.)

Connecting and engaging with advocates is a strategic decision. It involves your contact center but also focuses the rest of the organization on your customers. When successful, it helps create your organization's most powerful sales force—your customers.

Celebrating

Would you go to a game and wait until your team won to cheer? Of course not! If you’re like me, you’d be cheering all along the way. Celebrating progress is essential, and it sure makes things a lot more fun. Whether the wins are big or small, celebration has several significant benefits for your organization:

- It leads to a “mindset of success.” Acknowledging the achievement of even small milestones puts success front and center, making it both familiar and a foundation to build on.
- It opens up the big picture. When you celebrate your team’s achievements, it gives you an opportunity to talk about how your project or initiative contributes to the organization’s overall success (how you’re helping to achieve a broader mission).
- It’s a motivator. People want to believe they’re doing work that’s worthwhile. Celebrating milestones, especially when done in light of the “bigger picture,” reinforces the value of your team.
- It builds team spirit. Having your team take a breather from work to celebrate progress you’re making is a great way to build “esprit de corp” (group spirit), which leads to unity of purpose.

The most successful leaders make celebrating success a priority. They don’t fall prey to the most-cited reasons why it doesn’t happen, including:

- “I’m sure people know that we’re on target.” However, your team members are likely working on different aspects of customer service initiatives and might not have insight into whether they are on target or not.
- People will get complacent if they think things are going well.” Actually, celebrating wins motivates and prevents complacency. It’s dead wrong to assume you have to achieve a large goal in order to celebrate.
- And of course, “There’s not enough time.” But there’s always enough time to do the things that matter most. This is one of those things that can make a big difference.

A central responsibility of leadership is to keep your contact center and the broader organization focused, unified, and working toward the right goals. Be engaged in the game—don’t wait for the closing buzzer. Find ways to celebrate along the way!

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UNIFYING DISTRIBUTED TEAMS

Information and communications technologies have created organizations that span geography and time. Multi-site environments, cross-functional teams, and extended-hour or 24/7 operations are common contact center examples. If you manager or director, you may have the responsibility of getting results from those who work in different locations, who don report to you, or who don’t work the same hours.

Unfortunately, technology hasn’t eliminated the natural barriers that exist between people who work in distributed environments. Those who work in different places and/or at different times often have trouble seeing themselves as an in part of a larger team.

Like leadership in general, there’s no specific recipe for building a cohesive virtual team. However, there are tried-and-tru steps you can take that will significantly increase your chances for success:

- Create a clear vision for the contact center.
- Create opportunities for the people in the distributed environment to get to know each other. (For example, I know of a manager who set up an internal webpage profiling the members of a multi-site team, occasionally giving everyone a short

the interests and backgrounds of fellow members. Others are tapping into video-based meetings, internal social commun
other approaches to bring people together.)

- Look for ways to keep everyone involved. Time must be spent (even if it’s in short supply) to foster a collaborative environment.
- Take steps to ensure that everyone gets key information at the same time.
- Spend proportionately more time tending to the needs and relationships of the more “distant” members of the group. (Distant may mean the members who work the night shift, work primarily at home, or are in a site thousands of miles awa
- Look for ways to scrap (or at least minimize) the impact of unnecessary hierarchies and cumbersome bureaucracies, wh
tend to wreak havoc on distributed teams.
- Consistently communicate and celebrate progress. It’s important to keep the group updated and on the same track.

The challenges of leading a distributed team are real and ongoing, but being part of an environment in which people successfully work together across distance and time is one of the most rewarding professional experiences you can have
today’s world, it’s also one of the most necessary.

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The Highest Level of Leadership

For several years, I facilitated workshops for new managers of a financial services company. The training occurred annually, over the course of a week. This gave me a view into the organization that was like time lapse photography. The VP of customer service in the early years was charismatic, with a big personality. The organization produced good results, and he was highly regarded as an effective leader. When he left for another opportunity, the organization lost its way and struggled for many months. Another VP came onboard.

Eventually, however, the new VP found her footing. She had a quiet, very understated leadership style, but I could see strength in the organization began to return. She, too, eventually moved to a different position, but the organization’s successes continued. The first VP was an effective leader. He set clear goals, created an engaged environment, and enabled the team to achieve high levels of performance. But he was such a big presence that when he left, the organization felt rudderless. This was not the case when the second VP left.

Professor Jim Collins and his team of researchers for the book Good to Great (which is now two decades old, and has certainly stood the test of time) identified what they call “level 5 leadership.” The greatest leaders are those who build an organization (or team, or department) that continues to thrive after they are gone. Collins’s framework provides insight into the progression of leaders:

- Level 1 is a capable individual, who contributes talent, knowledge, skills, and good work habits.
- Level 2 is a contributing team member who works well with others to produce results.
- Level 3 is a competent manager who can organize employees and resources, to attain results.
- Level 4 is an effective leader who catalyzes commitment to a vision and rallies support to achieve high levels of performance.
- Level 5 is the leader who possesses the combination of humility and a ferocious will for the organization to be remarkable. Their focus is on leaving the organization stronger and ensuring

that it can sustain success.

Collins and his team refer to the mirror and window to differentiate behavior between level 4 and level 5 leaders. Level 5 leaders look out the window to credit others for success, and look in the mirror to take responsibility when things don't go as planned. Charismatic leaders who haven't reached level 5 tend to do just the opposite: they look out the window to find reasons for failure and look in the mirror to take credit when things go well.

If your team falls apart when you're not available, there's probably opportunity to clarify responsibilities, further empower your employees, and improve processes, tools, and training to reduce dependencies. Can you go on vacation without checking in? That's a sign that you've probably built a team or an organization that's working. (And you deserve that vacation!)

Collins observed, "Greatness is not a matter of circumstance—it is a matter of choice and discipline." I agree, and I find it encouraging and inspiring. What's the strength you're building in your organization? What's the legacy you will leave?

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Points to Remember

- Your organizational structure should be unique and fit your specific environment. It can and must change as your services evolve.
- An important part of developing an effective organization is to identify the positions you'll need and the responsibilities that will go along with each—and make sure to keep them up-to-date.
- Sensible agent-to-supervisor ratios are dependent on the tasks, standards, and responsibilities of both the agents and the supervisors.
- Developing attractive career and skill paths that keep employees interested, engaged, and growing is an important leadership responsibility.
- Your culture should ensure that your organization's personality shines through, that you're building customer advocates, and that your team celebrates successes along the way.
- The highest form of leadership is to build an organization or team that thrives without you.

Chapter 17: Traits of the Best-Managed Contact Centers

"Teach us to number our days, that we may gain a heart of wisdom."
BOOK OF PSALMS

There are those, I've heard, who read the last chapter of a book first. If they like it, they feel like they got the gist, the key take-aways. If they don't like it…well, no big loss, they avoided wasting time.

How do I know this? All too often, I'm one of them. I love checklists, summaries, bullet points. Please just get to the point, I'll often be thinking to myself in courses, plodding through reports, or reading business books that sometimes drone on. So the logic of jumping to the last chapter appeals to me.

But here's the thing. There are no shortcuts to providing consistently great service. There is no "executive summary" that will equip you to understand and build an effective contact center. I wish there were. In fact, I contemplated providing an appendix for this edition with detailed summaries of what is covered in each chapter—one page each. In the end, I decided that would be a disservice.

Why? Consider a comparison to customer service. Just think about how annoyed you are when you need help and the customer service agent can only relay basic talking points. You want to engage in a conversation with a real person—someone who understands more deeply, and who is truly empowered to help.

Sure, you can go through the book as you choose, in an order and at a speed that makes sense for you—with (hopefully) highlighter or pen in hand. Your highlights and notes become the summary. But it's your summary. That's different and far better than me trying to create one for you.

Your organization, team and customers are unique. There's no one-size-fits-all recipe for building and managing a truly effective contact center. That's a main reason for this book—to give you the deeper information you need to make decisions that are right for your situation. That caution in mind, this last chapter reviews everything we've covered. What sets the best contact centers apart? If you have to boil it all down, what traits stand out?

In some organizations, you feel the energy as soon as you walk in the door. It takes many forms: a strong sense of purpose, camaraderie, and the willingness to make the extra effort. Everybody knows the mission and everybody is pulling in the same direction. The contact center "clicks." But without fail, you'll find these seven characteristics at work.

(If you have followed prior editions, or ICMI's reports on this topic, there used to be 12 traits of the best-managed contact centers. They are all still here—we've just simplified and consolidated them into seven.)

1. They Deliver Significant Value

The most effective contact centers have a relentless focus on creating value for their organizations and customers. Far too many organizations are focused primarily on one level or one dimension of value: deliver to deliver services efficiently, improve revenues, or boost customer satisfaction, and so on. While those are good goals, the best organizations have their sights set higher. They align their resources, strategy, and culture to deliver maximum value on all three levels (see Chapters 1 and 13): efficiency, customer loyalty, and strategic value.

Some centers I've worked with are referred to as "R&D Machines" by their organizations (R&D as in research and development) because of the insight they capture during interactions, share with other departments, and use to continually create better products and services. After all:

- It's the contact center that first sees early warning signs of product or service glitches.
- It's the contact center that best knows how well you keep your promises to customers.
- It's the contact center that knows firsthand when communication is unclear or where systems don't work as intended.
- And it's those in the contact center who can so clearly see where there are opportunities to innovate and better meet customer needs.

When captured and shared, this insight can help virtually every other part of the organization. But it takes the right management approach to make sure these opportunities don't slip through your fingers.

By maximizing value on all three levels, effective contact centers achieve a fourth level of value—the ultimate value these services provide to customers. What really happens when customers can access the services they need, seamlessly and easily? What is the impact on their economic situation? Their peace of mind? Their families?

After facing enormous challenges and tragedy, GM is now engaging with customers across channels (see Chapters 10 and 15). Customer service has become an engine of quality improvement, innovation, and brand advocacy. I've seen scores of other organizations similarly discover the true potential of their contact centers.

2. They Build a Customer-Focused Culture

Culture tends to guide behavior, and it can either support or ruin the best-laid plans. While there is no guaranteed formula for creating a supporting culture, many experienced managers agree that shaping culture—or, more correctly, enabling it to flourish—is an important leadership responsibility.

One of the most critical aspects of managing a successful contact center is to provide services that satisfy changing consumer demands. Those that fall behind pay a steep price: dissatisfied customers, insufficient support from the organization and low morale. But those who stay ahead of the curve enjoy strong customer loyalty and the many benefits that come with it. The stakes are high.

Most organizations have discovered firsthand a basic reality of customer psychology. When you improve your service, customers rather quickly progress through four distinct stages:

- They appreciate it.
- They get used to it.
- They expect it.
- They demand it.

Consequently, continually improving services to meet evolving customer expectations is a mandate in today’s environment. In leading contact centers, the ten customer expectations (see Chapter 2) are an important part of the organization’s development and culture. The list is sometimes prominently posted or even memorized by employees, and works its way into everything from strategy to process design to day-to-day planning and coaching activities.

In short, the best-managed centers have a relentless focus on customers’ ever-evolving needs and expectations. They know that what worked yesterday will not necessarily work tomorrow. They are continually redefining plans and reshaping services around those expectations.

How else do leading contact centers create high-performance cultures? How do they communicate their mission and values in a way that gets buy-in and alignment? There are notable characteristics that stand out:

- They have a compelling vision that gets everyone on the same page.
- They have—and use—an up-to-date customer access strategy, which ensures that everyone is pulling in the same direction (see Chapter 2).
- They ensure that everyone across the contact center and larger organization has an understanding of their contribution to the organization and its customers (see the first characteristic).
- They have a people-first perspective (see the next characteristic).
- They cultivate a collaborative planning process so that their operations run smoothly, enabling them to focus on higher-level issues that matter most.
- They get needed budget and support from their organizations (Chapters 10 and 16).

Michael O’Leary, CEO of no-frills Ryanair, says he learned the importance of customer service the hard way. He once dismissed it, “We don’t want to hear sob stories. What part of ‘no refund’ don’t you understand?” That was until he faced huge operating losses and Ryanair was named by one source as the second-worst brand in the world. After a change in perspective and many improvements to service, O’Leary later looked back and said, “If I had known being nicer to our customers was going to work so well, I would have done it years ago.”

3. They Know That Their People Are the Key to Success

Cultures vary dramatically from one organization to the next. Harley Davidson, MOO, and Clio have very different cultures (see Chapters 2 and 16). Their organizations’ unique personalities shine through—and swapping their styles of service would create very odd customer experiences. But in each case, a people-first philosophy is evident.

Southwest Airlines, consistently one of the world's most admired companies, explains their approach this way: "In our 'order of importance,' we put our employees first, then our customers, then our shareholders. Many companies feel you have to appease the customers or shareholders first … We believe that, if we treat our employees right, they will treat our customers right, and in turn that results in increased business and profits that make everyone happy."

The most important implication of the trends discussed throughout the book, and particularly in Part Four and Five, is clear: your people are the key to success.

4. They Cultivate Effective Processes

Discussing processes can sometimes make eyes glaze over. But effective processes are essential, and their value cannot be overstated. The most effective contact centers view processes holistically and strategically, and several themes stand out:

They view the contact center as a total process. The reality is that the contact center is an important part of a much bigger process. That has been a theme throughout the book, and it takes many forms:

- Ensure that everyone in the contact center, and those with key supporting roles outside the center, have a basic understanding of how contact centers operate (encourage them to read Chapters 9 and 10!).
- Recognize that the process is where most quality problems occur—and also where the opportunities for service improvements and cost reductions exist (Chapter 13).
- Take the initiative in coordinating with other departments (Chapters 13 and 16).
- Empower your employees to respond to changing conditions, and give them the authority to resolve issues in real time (Chapter 11).

Without exception, they have a collaborative planning process. Effective planning is a central theme in Parts Two and Three of this book. A major objective of good planning is to get the right number of skilled people and supporting resources in place at the right times, doing the right things.

But systematic planning accomplishes more than that. It also improves communication and culture by creating a body of information that wouldn't otherwise be available, compels people to look into the future and see their work in the context of a larger framework, and encourages communication about values—issues such as resource allocations and workload priorities.

Largely due to effective planning, great contact centers work so well that they are almost transparent. The teams concentrate on delivering the organization's services and on building the organization's value and brand—the effective operation of the contact center becomes a given.

These effective contact centers also establish and focus on the right metrics. As discussed in Chapters 12 through 14, metrics are plentiful and it's easy to get buried in information—or worse, focus on the wrong things. The contact centers that get the best results from using their reports and information have several things in common:

- They focus on a relatively small number of metrics and objectives that support their mission and direction. They know that trying to focus on too many things is counterproductive.
- They ensure that measurements are as accurate, complete, and unbiased as possible. They are aware of how easily statistics can be misinterpreted. They view reports in light of how they relate to each other. They know that a single report, outside the context of the others, can lead to erroneous conclusions.

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- They understand that simply tracking high-level measurements won’t improve results.

Instead, they work on the root causes—the factors behind these outputs.

Zappos CEO Tony Hsieh is so adamant that employees focus on building relationships and making emotional connections (rather than making sales), that he has held “longest call” contests. One record-breaking call exceeded ten hours!

Are long interactions the point? Of course not. And do long interactions equate to better connection? Not necessarily. But Zappos, an online retailer in a price-sensitive sector, has concluded that they don’t want upselling or revenue as their primary goal for individual interactions. They want to build relationships and then see good things follow.

5. They Effectively Leverage Technology

As discussed in Chapter 15, new technologies are not passive—they are changing customer expectations, creating power shifts in organizations, and impacting the responsibilities of agents and managers. The best contact centers identify the technologies that further the mission of the organization, and they implement them with foresight, planning, and training.

They also recognize that an important (according to the late Peter Drucker, the most important) impact of technology is not the capabilities of the technologies themselves, but that they require you to organize your processes and information more logically. The most effective contact centers have systems that are supported by processes designed to ensure information on customers, products, processes, and services is current and accurate.

For example:

- Their knowledge management systems work because they make entering and updating knowledge a priority at the point of contact.
- Their quality monitoring systems are valuable because they have clearly defined quality and what needs to happen to support the organizations’ highest-level objectives.
- Their reporting systems provide essential support for making sound business decisions because they produce accurate information on the right things, delivered to the right people at the right times.
- AI, chatbots, and other emerging capabilities are viewed and implemented in the context of their customer access strategies, with a focus on what’s best for their customers.

In short, the most effective contact centers respect what technology can do, but they know that it’s of little use without supporting processes and a clear direction. Some have the latest capabilities; others don’t—but they use what they have to support their mission and most important objectives.

6. They Get the Budget and Support They Need

Far too many contact centers are operating under the philosophy of, “Okay, these are the resources we’re willing to give you, and this is what we want you to achieve …” That’s putting the cart before the horse.

Here’s an analogy. Airlines couldn’t possibly operate a flight without a tangible connection between the results they want to achieve and the supporting resources they need. They start with an objective—fly 300 people from Frankfurt to Dubai. The objective is not a wishful goal, but a specific predetermined outcome supported by carefully calculated resources.

Similarly, the best contact centers first decide on the objectives they want to achieve. Then they allocate the resources necessary to support those objectives, through informed calculations and disciplined planning (as discussed in Chapters 4 through 10). Support also very much depends on building customer-focused organizations (see Chapter 16). They encourage collaboration, harness the principles of effective organizational structure, and continually work on identifying the positions they need and the responsibilities that go along with them. They focus on what matters and they celebrate successes along the way.

Sarah Gibart is Education and Quality Supervisor for Gopher Sport, a leading supplier of physical education, athletics, and fitness products. She and several of her colleagues recently won awards from ICMI for the innovative work they are doing in the contact center. Gibart recalls her journey over the past 12 years: “I had no contact center experience before walking in the door.” She credits mentors “who were there for me the whole way. That is what I experienced from the very beginning and I really wanted to give that back and watch people grow and be successful.”

Bravo, Sarah! This principle (core value) of helping others succeed is one I’ve repeatedly seen in the most successful organizations.

7. They Continuously Innovate

Apple founder Steve Jobs once commented: “I think Henry Ford once said, ‘If I’d asked customers what they wanted, they would have told me: a faster horse!’” Whether Ford actually said that is disputed, but he (and Jobs) certainly lived by the underlying principle: people don’t know what they want until you show it to them.

The most successful contact center teams continually review and reassess how they do things and the results they are achieving. What can be improved? What should be scrapped? What assumptions no longer make sense? What can be done differently? They agree with the advice of management consultant Dr. Ichak Adizes, who reminds us, “You don’t know what you don’t know until you know it … The right solution is a continuous search for the right solution.”

Where to from Here?

The contact center profession has come a long way in recent years. Customer expectations are high, and for good reason. Many contact centers have learned how to deliver.

But things are changing rapidly, and some in our profession view the future with at least some apprehension. They fear the impact and uncertainties that new capabilities (such as AI or emerging social media platforms) bring. They contemplate the increasingly diverse and complex interactions their centers will handle. They wonder how they’re going to keep up.

It’s important to remember, though, that the very things causing uncertainties are also bringing the most significant opportunities. More than ever, organizations need professionals who can help them sort through these changes and make sound business decisions. By virtually any measure, there’s a shortage of leaders who really understand the unique contact center environment and how to deliver great business results.

Clearly, contact centers are becoming increasingly complex to operate, and that trend will continue. But if you know and practice the principles covered in this book, you’ll have a big head start.

Contact centers are becoming increasingly complex to operate…but if you know and practice the principles covered in this book, you’ll have a big head start.

We have become a communication-oriented economy. In many ways, we are all pioneers in creating the next generation of services—services our customers will come to expect, our organizations will depend on and our economy will require. We have more opportunity right now than at any time in the history and growth of the contact center profession to shape services that have a positive impact.

This is the most exciting season of development yet. The opportunities are there for the taking—this is the new era of customer experience.

Thank you for joining me on this journey!

Notes

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Acronyms and Abbreviations

ACD = Automatic Contact Distributor
ACW = After-Call Work or After-Contact Work
AHT = Average Handling Time or Average Holding Time on Trunks
AI = Artificial Intelligence
ANI = Automatic Number Identification
ASA = Average Speed of Answer
ASR = Automatic Speech Recognition
ATA = Average Time to Abandonment
ATB = All Trunks Busy
ATT = Average Talk Time
AWT = Average Work Time
BPO = Business Process Outsourcing
CCaaS = Contact Center as a Service
CCO = Chief Customer Officer
CED = Caller-Entered Digits or Customer-Entered Digits
CEM = Customer Experience Management
CIO = Chief Information Officer
CLI = Calling Line Identity
CMS = Call Management System or Contact Management System
CRM = Customer Relationship Management
CSAT = Customer Satisfaction or Customer Satisfaction Score
CTI = Computer Telephony Integration
CX = Customer Experience
CXO = Chief Experience Officer
DNIS = Dialed Number Identification Service
DTMF = Dual-Tone Multifrequency

ERP = Enterprise Resource Planning
EWT = Expected Wait Time
EX = Employee Experience
FCR = First Call Resolution or First Contact Resolution
FTE = Full-Time Equivalent
IBC = In-Between Contacts

IM = Instant Messaging
IoT = Internet of Things
IP = Intellectual Property or Internet Protocol
IRT = Interactive Response Technology
IS = Information Systems
ISDN = Integrated Services Digital Network
IT = Information Technology
IVA = Intelligent Virtual Assistant
IVR = Interactive Voice Response
IXC = Interexchange Carrier
KM = Knowledge Management
KPI = Key Performance Indicator
LBS = Location-Based Services
LEC = Local Exchange Carrier
LWOP = Leave Without Pay
MAC = Moves, Adds and Changes
MIS = Management Information System
ML = Machine Learning
MM = Multimedia
NCC = Network Control Center
NPS = Net Promoter Score
OPA = Off-Phone Activity
PBX = Private Branch Exchange

QA = Quality Analysis or Quality Assurance
QM = Quality Management or Quality Monitoring
QMS = Quality Management System
QOS = Quality of Service
RAN = Recorded Announcement
RNA = Ring No Answer
ROI = Return on Investment
RONA = Roll Over No Answer
RPA = Robotic Process Automation
RSF = Rostered Staff Factor
SaaS = Software as a Service
SBR = Skills-Based Routing
SIP = Session Initiation Protocol
SL = Service Level
SLA = Service Level Agreement
SMS = Short Messaging Service
TTS = Text-to-Speech
UX = User Experience
VOC = Voice of the Customer
VoIP = Voice-over-Internet Protocol
VR = Virtual Reality
VRU = Voice Response Unit
WFMS = Workforce Management System
WFO = Workforce Optimization

Glossary

#. The octothorpe, commonly referred to as “pound sign” or “hashtag;” hashtags are a common way to tag messages so t
can be discovered and grouped.

24x7. Refers to operations that are always open for business (24 hours a day, seven days a week).

5G. Fifth-generation wireless, designed to increase the speed and capabilities of wireless networks.

5 Whys. An iterative approach to root cause analysis that involves identifying a problem, then asking why it’s occurring fiv times (“following the trail”). Each answer forms the basis for the next question.

800 Number. Also known as “1-800 number.” Toll-free numbers that begin 800, 888, 877, 866, 855 or 844. The business, rather than the customer, pays for charges.

Abandoned Contact. Also called an abandoned call or lost call. The customer hangs up or gives up on an interaction befo reaching an agent. Related terms: Customer Tolerance, Service Level.

Adherence to Schedule. A general term that refers to how well agents adhere to their schedules. The two terms most ofte associated with adherence include availability (the amount of time agents were available) and compliance (when they we available).

After-Call Work (ACW). Also called after-contact work, wrap-up, post-call processing, average work time or not ready. Work that is necessitated by and immediately follows a contact. Related terms: Average Handling Time, Talk Time.

Agent. The person who handles customer interactions. Also referred to as customer service representative (CSR), custor care representative, telephone sales or service representative (TSR), rep, associate, consultant, engineer, and other vari

Agent Features. Features on a system that are designed for agent use.

Agent Group. Also called split, gate, queue or skills group. An agent group shares a common set of skills and knowledge, handles a specified mix of contact types (e.g., service, sales, billing, technical support) and can comprise hundreds of age across multiple sites. Supervisory groups and teams are often subsets of agent groups.

Agent Performance Report. An ACD report that provides statistics for individual agents (e.g., on average handling time or unavailable time).

Agent Status. The mode an agent is in (e.g., talk time, after-call work, unavailable, etc.). See Work State.

All Trunks Busy (ATB). When all trunks are busy in a specified trunk group. Related terms: Erlang B, Trunk, Trunk Load.

Analytics. Broadly refers to data analysis and reporting tools that enable the organization to analyze disparate data to uncover correlations and better understand customer trends and business activities. Related terms: Speech Analytics, Te Analytics.

Announcement. A recorded verbal message played to customers. See Delay Announcement.

Answered Call. When referring to an agent group, a call is counted as answered when it reaches an agent. Related terms Handled Call, Offered Call, Received Call.

Application-Based Routing and Reporting. An ACD capability that enables the system to route and track transactions by type of contact, or application (e.g., sales, service, etc.) versus the traditional method of routing and tracking by trunk grou agent group.

Application Service Provider (ASP). An outsourcing business that enables other organizations to access and use technologies or services for a fee.

Architecture. The basic design of a system. Determines how the components work together, system capacity, ability to upgrade and ability to integrate with other systems.

Artificial Intelligence (AI). Refers to computer systems simulating human intelligences, i.e., in decision-making, speech recognition and translation, and others.

Asynchronous Messaging. Messages that do not require an immediate response are put in queue, for later handling.

Attendant. A person who works at a company switchboard, often called a receptionist or operator. See Agent.

Attrition (Employees). See Turnover.

Attrition Rate (Customers). Also referred to as churn; the percentage of customers lost in a given period of time.

Augmented Reality. See Virtual Reality.

Authentication. Verifying the identify of a customer, user, or process.

Auto-Available. An ACD feature whereby the ACD is programmed to automatically put agents into available status after they finish talk time and disconnect calls. If they need to go into after-call work, they manually put themselves there. Relat terms: Auto Wrap-Up, Manual Available.

Auto Wrap-Up. An ACD feature whereby the ACD is programmed to automatically put agents into after-call work after they finish talk time and disconnect calls. When they have completed any after-call work required, they put themselves ba available. See Auto- Available.

Automated Greeting. An agent’s pre-recorded greeting that plays automatically when a call arrives at his or her telephone station.

Automated Reply. A system-generated reply that is automatically sent to a customer, acknowledging that his or her message was received and informing the customer of when to expect a response from an agent. See Response Time.

Automatic Call Distributor (ACD). May also be referred to as automatic contact distributor. The specialized system used to route, manage and report on customer contacts. Basic ACD capabilities include route contacts; sequence contacts; en
customers to wait (by playing delay announcements and, in some cases, predicting and announcing wait times); distribute
contacts among agents; capture planning and performance data, both real-time and historical; and integrate with other sy

Automatic Call Sequencer (ACS). A simple system that is less sophisticated than an ACD, but provides some ACD-like functionality. See Automatic Call Distributor.

Automatic Number Identification (ANI). A telephone network feature that passes the number of the phone the caller is using to the contact center in real time. Related terms: Computer Telephony Integration, Dialed Number Identification Ser

Automatic Speech Recognition (ASR). An IVR capability that enables customers to interact with computers using spoken language.

Auxiliary Work State. An agent work state that is typically not associated with handling contacts (e.g., meeting with supervisor). When agents are in an auxiliary mode, they will not receive contacts.

Availability. The time agents spend handling contacts or waiting for contacts to arrive. See Adherence to Schedule.

Available State. The work state of agents who are signed in to the ACD and waiting for contacts to arrive. See Occupanc

Available Time. The total time that an agent or agent group waits for contacts to arrive, for a given time period.

Avatar. An agent's or customer's visual representation of themselves, e.g., a photo or icon.

Average Call Value. Also average contact value. A measure common in revenue-producing contact centers. It is total revenue divided by total number of contacts for a given period of time.

Average Concurrent Chat Sessions. The average number of simultaneous chat sessions each agent handles. For related terms, see Chat.

Average Delay. See Average Speed of Answer.

Average Handling Time (AHT). For calls, AHT is the sum of average talk time plus average after-call work. For contacts without talk time (e.g., email), AHT is average time agents spend handling the interactions plus the average time they spe
any work that follows contacts. Related terms: Talk Time, After-Call Work.

Average Holding Time on Trunks (AHT). The average time inbound interactions occupy the trunks.

Average Number of Agents. The average number of agents logged in to an ACD group for a specified time period.

Average Speed of Answer (ASA). Also called average delay. A measure that reflects the average delay of all calls, including those that receive an immediate answer.

Average Time to Abandonment (ATA). Also called average delay to abandon. The average time that customers wait in queue before abandoning. Related term: Customer Tolerance.

Average Work Time (AWT). See After-Call Work.

Back Office. Business applications and functions that are "behind the scenes" to a customer, e.g., accounting, finance, inventory control, fulfillment, productions and human resources. See Front Office.

Balanced Scorecard. An approach to metrics and management that aims to gives managers a "balanced" view of performance by establishing key performance indicators (KPIs) in different categories. Common categories include custo
employee, financial, and process or organizational maturity.

Bandwidth Calculator. Software tools used for calculating the bandwidth capacity required for SIP trunks. See Trunks.

Base Staff. Also called seated agents. The minimum number of agents required to achieve service level and response tim
objectives for a given period of time. Related term: Rostered Staff Factor.

Beep Tone. An audible notification that a call has arrived. Beep tone can also refer to the audible notification that a call is being monitored. Also called zip tone. Related terms: Automated Greeting, Call Forcing.

Best Practice. Practices or procedures that have been proven across a large number of organizations or situations to be correct or most effective.

Big Data. Large sets of data that can be analyzed using software tools to identify trends, associations, or insight on specif
issues or variables. See Analytics.

Blended Agent. An agent who 1) handles both inbound and outbound contacts, and/or 2) handles contacts from various channels (e.g., phone, chat, social media). See Call Blending.

Blocked Call. A call that cannot be connected immediately because 1) no circuit is available at the time the call arrives, or
2) the ACD is programmed to block calls from entering the queue when the queue backs up beyond a defined threshold.
Controlled Busies.

Bottom-Up Forecasting. A forecasting methodology that begins with intervals, then works up to larger spans of time—e.g.

intervals add up to days, then weeks, then months.

Brand Advocate. See Customer Advocacy.

Brick and Mortar. The physical facilities in which an organization does business (versus online).

Business Continuity Plan. Also called Disaster Recovery Plan. A plan, developed as part of business continuity management, that enables the organization to avoid or recover expediently from an interruption in operations.

Business Process Outsourcing (BPO). Outsourcing business functions or responsibilities to another company. A business process outsourcer (BPO) is the company providing these services.

Business Rules. A phrase used to refer to various software (or manual) controls that manage contact routing, handling ar follow-up. At a basic level, business rules are a sequence of “if-then” statements. More advanced business rules can harr technologies. Often used interchangeably with workflow.

Business-to-Business (B2B). Business or interactions between businesses. See Business-to-Consumer.

Business-to-Consumer (B2C). Business or interactions between a business and consumers. See Business-to-Business.

Busy. In use, or “off hook.”

Busy Hour. A resource engineering term, referring to the hour of time resources (i.e., trunks) carry the most traffic during the day, month, or season.

Busy Season. The busiest time of a year for a contact center.

Calibration. In a contact center, calibration is the process in which variations in the way performance criteria are interprete from person to person are minimized. See Monitoring.

Call. Also called contact, interaction or transaction. Although call most often refers to a telephone call, it can also refer to video call, or other types of customer contacts. See Contact.

Call Avoidance. Also called contact avoidance. Techniques used to eliminate or divert contacts away from a contact cente or support center, e.g., by improving products or services to prevent service issues, improving self-service systems, and o

Call Blending. Also referred to as contact blending. Traditionally, refers to the ability to dynamically allocate contact cente agents to both inbound and outbound contacts based on real-time needs. More recently, call blending often refers to blen customer contacts with non-phone work or handling contacts from various channels (e.g., email, text, chat, social, or othe Blended Agent.

Call Center. See Contact Center.

Call Control. The process whereby the agent efficiently guides a contact from beginning to end—identifying the customer' needs and requirements, providing the best solution, etc.

Call Forcing. An ACD feature that automatically delivers calls to agents who are available and ready to take calls. They hear a notification that the call has arrived (e.g., a beep tone) just before the call is delivered to them. See Manual Answe

Call Load. Call load is volume of contacts multiplied by average handling time of them, for a given period of time. See Workload.

Call Selection. A function in routing software that selects the best contact for an agent to handle when there is a queue ar an agent has become available. See Agent Selection. (Vanguard)

Call Treatment. A term that refers generally to announcements, music, busy signals, ringing or recorded information provided to callers while they are in queue. (Vanguard)

Callback Messaging. See Virtual Hold.

Caller-Entered Digits (CED). Also referred to as customer-entered digits or prompted digits. The digits a customer enters on his or her phone keypad. Usually used for auto attendant, voice response and CTI applications.

Career Path. Career paths guide individual employee development through structured advancement opportunities within the contact center and/or organization. See Skill Path.

Carrier. A company that provides telecommunications circuits. Carriers include both local telephone companies, also calle local exchange carriers (LECs), and long-distance providers, also called interexchange carriers (IXCs).

Carryover Forecasting. Forecasting for contacts that carry over from one interval to the next, such as calls that begin before midnight and do not conclude until after midnight (carry over into the next day) or contacts that begin in one interva carry over into the next.

Case Management System. A software system used to capture and track information about individual contacts, incidents, service requests and customers. (HDI)

Cause-and-Effect Diagram. A chart that illustrates the relationships between causes and a specific effect you want to stud

Central Office (CO). Can refer to either a telephone company switching center or the type of telephone switch used in a

telephone company switching center.
Channel Hopping. Also referred to as channel switching. When customers switch to a different access method, e.g., they send a message through social media instead of continuing to wait on hold after placing a call. The term can also refer to customers who use the same channel but try different routing methods (e.g., they dial alternative phone numbers or try di selections in an IVR menu). Related term: Simultaneous Contacts.
Chat. Enables customers to have real-time, text-based conversations with agents. Related terms: Close-out, Customer Response Time, Exchange, Exchange Response Time, Session, Session Handle Time, Session Response Time, Sessio Transaction Time.
Chatbot. A chat robot that can converse with a human user through text or voice commands. Related term: Intelligent Virtual Assistant (IVA).
Chief Customer Officer (CCO). Also referred to as Chief Experience Officer (CXO). The senior executive responsible for the design and coordination of all customer-related activities across the organization. (CX Accelerator)
Chief Experience Officer (CXO). See Chief Customer Officer.
Chief Information Officer (CIO). A typical title for the highest-ranking executive responsible for an organization's information systems.
Circuit. A transmission path between two points in a network.
Clean Desk Policy. A policy that does not allow cell phones, writing utensils, paper, etc. at an agent workstation, with the purpose of reducing the risk of information theft, fraud, or a security breach.
Close-out. In chat, the moment in time when the session is considered to be complete. See Chat for related terms.
Cloud-Based Services. Software or services delivered "on-demand" through shared services, over a network. For contact centers, many features once available only in premise-based systems can now be delivered through the cloud. Related te Contact Center as a Service (CCaaS).
Co-Browsing. A term that refers to the capability of both an agent and a customer to see web pages simultaneously and share navigation and data entry.
Coaching Model. A structured approach to providing ongoing feedback to individuals on their performance, which helps s the expectations of agents, coaches, and managers and holds coaches accountable.
Collaboration Tools. Broadly refers to technology capabilities that enable a group of users to easily communicate and sha information.
Collateral Duties. Non-phone tasks (e.g., data entry) that are flexible and can be scheduled for periods when call load goe down. Related term: Schedule.
Completed Call. A general term that refers to an inbound contact that successfully reaches and is handled by an agent. C also refer to an outbound call that successfully reaches a live person (or answering machine, if leaving a message is acce

In an outbound context, also called connected call.
Compliance. Can refer to 1) Adherence to rules, regulations, or laws, or 2) how well agents adhere to schedules. See Adherence to Schedule.
Computer-Based Training (CBT). Also referred to as elearning. Training programs delivered through software applications without the need for a facilitator. See Technology-Based Training.
Computer Simulation. A computer-based simulator program that predicts the outcome of various events in the future, given many variables.
Computer Telephony Integration (CTI). The software, hardware and programming necessary to integrate computer systems and telephone systems so they can work together seamlessly and intelligently.
Concentrated Shift. A scheduling technique that requires agents to work more hours in a day, but fewer days in a week. "Four-by-10" shifts (four days on for 10 hours each, with three days off) are particularly popular with many agents.
Conditional Routing. The system capability to route contacts based on real-time criteria (e.g., contacts in queue, time of day and type of contact).
Contact. In contact centers, contacts refer to the interactions with customers and can include phone, chat, email, text, soc media, video, or other types of interactions. See Call.
Contact-by-Contact Routing. The process of routing each contact to the optimum destination according to real-time conditions.
Contact Center. ICMI defines contact center as "a coordinated system of people, processes, technologies and strategies provides access to information, resources, and expertise, through appropriate channels of communication, enabling intera that create value for the customer and organization." Contact center is an umbrella term that generally refers to a cross-tr

groups of agents handling customer service, sales, technical support or other types of customer interactions. See Contac Management.

Contact Center as a Service (CCaaS). A cloud-based solution that provides contact center system capabilities through th cloud (rather than through premise-based systems). See Cloud-Based Services.

Contact Center-Initiated Assistance. Typically, this refers to a chat session initiated by an agent, rather than the customer

Contact Center Management. Also referred to as call center management. ICMI's definition is: "the art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality." See Contact Center.

Contact History. The history of a customer's interactions with an organization, generally recorded and stored in a custome information system.

Contact Management System (CMS). Also referred to as call management system. Another term for an ACD reporting system.

Contact Quality. Also referred to as call quality. Measure that assigns a value to the quality of individual contacts. Related terms: Calibration, Monitoring.

Contacts Handled. Also referred to as calls per agent. The number of contacts an agent handles in a given period of time Related terms: Occupancy, Queue Dynamics.

Contacts in Queue. Also known as calls in queue. A real-time report that refers to the number of contacts received by the ACD but that have not yet connected to an agent. See Service Level.

Contacts Per Hour. An outbound term that refers to the number of contacts divided by agent hours on the dialer.

Control Chart. A quality tool that provides information on variation in a process.

Controlled Busies. The capability of the ACD to generate busy signals when the queue backs up beyond a programmable threshold. See Blocked Call.

Conventional Shift. A traditional five-day-a-week shift during "normal business hours" (e.g., 9 a.m. to 5 p.m., Monday through Friday).

Conversation. Can refer generally to 1) the organization's engagement with communities and customers through social media (e.g., "join the conversation"—listen to what's being discussed in social networks and respond when and as approp or 2) a specific interaction with a customer, e.g., having a conversation through phone, chat or other channels.

Core Values. A set of principles that determine how an organization does business with its employees, customers and vendors. (CX Accelerator)

Cost/Benefit Analysis. A term used to describe the process of comparing the value of a potential project with the cost associated with implementing the project.

Cost Center. An accounting term that refers to a department or function in the organization that does not generate profit. When a contact center is viewed as a cost center, the focus is on handling contacts with the least total cost to the organiz Related term: Profit Center.

Cost of Delay. The money an organization pays to queue callers, when toll-free service is provided.

Cost Per Contact. Total costs (fixed and variable), divided by the total contacts for a given period of time.

Cross-Sell. A suggestive selling technique that offers additional products or services to current customers. See Upsell.

Cross-Train. To train agents to handle more than one defined mix of contact types or channels (e.g., to train technical support agents handling laptops to also support tablets or printers).

Customer Access Strategy. The overall strategy that defines how customers will interact with the organization. According to ICMI, it is "a set of standards, guidelines and processes describing the means by which customers and the organizatio interact and are enabled to access the information, services and expertise needed."

Customer Advocacy. Refers to the actions the organization takes to do what is best for customers, which, in turn, rewards the organization with loyal customers who become advocates (brand advocates) for the organization's products and servi

Customer Care. A general term that refers to proactive customer service that creates high levels of customer satisfaction and loyalty. The term customer care center has become a popular variation of contact center.

Customer-Controlled Routing (CCR). A vendor-specific term that refers to a call routing application that enables contacts to be handled (e.g., routed, queued, distributed) based on user-defined criteria.

Customer Effort Score (CES). A customer satisfaction metric, based on surveys that ask customers to rate how easy it wa to resolve their issues. Typically based on a 7-point scale from "very difficult" to "very easy."

Customer Engagement. Organizational stakeholders from different functions work together to understand a customer's needs and enhance the business relationship. (CX Accelerator)

Customer-Entered Digits. See Caller-Entered Digits.

Customer Experience. Refers to all of the experiences customers have with an organization, including products, services, processes, policies, expectations, and other factors. It is the “big picture,” the end-to-end customer journey. Related terms Customer Advocacy, Voice of the Customer.

Customer Journey. All interactions and touchpoints a customer has with an organization.

Customer Lifetime Value. Expresses the value of a customer to the organization over the entire probable time period in which the customer will interact with the organization.

Customer Loyalty. Typically defined in terms of the customer’s repurchase behavior, intent to purchase again or intent to recommend the organization. See Customer Advocacy.

Customer Persona. Written and/or graphical representation of the different customer segments a business is serving or targeting. (CX Accelerator)

Customer Premises Equipment (CPE). A telecommunications term referring to equipment installed on the customer’s premises and connected to the telecommunications network.

Customer Relationship Management (CRM). The process of holistically developing the customer’s relationship with the organization. It takes into account their history as a customer, the depth and breadth of their business with the organizatio other factors.

Customer Response Time. The time it takes the customer to read an agent’s reply and send a response. Relates to chat other customer interactions that require back and forth exchanges with customers. See Chat for related terms.

Customer Retention Rate. The percentage of a prior period’s customers who are still customers in the current period (excluding new customers acquired). Related term: Customer Loyalty.

Customer Satisfaction. The level of satisfaction customers have with the organization and the organization’s products and services. See Customer Loyalty.

Customer Satisfaction Score (CSAT). A metric that gauges customer satisfaction, based on variations of the question, “How would you rate your experience?”

Customer Segmentation. The process of grouping customers based on what you know about them, in order to apply differentiated marketing, relationship and contact management strategies.

Customer Tolerance. How patient customers will be when they encounter queues and other inconveniences in service delivery. Related terms: Abandoned Contact, Queue Dynamics.

Dashboards. Easy-to-comprehend graphical reporting of critical KPIs.

Data Mining. Generally refers to the use of analytics capabilities to analyze data, e.g., to identify trends and causal factors Relates terms: Big Data, Analytics.

Day-of-Week Routing. A network service that routes calls to alternate locations, based on the day of week. There are also options for day-of-year and time-of-day routing.

Deflection Rate. In social media, the percentage of customer service issues that are transferred from social media to anot communications channel, such as email, chat or phone.

Delay. Also called queue time. The time a customer spends in queue waiting for an agent to become available. Average delay is the same thing as average speed of answer. Related terms: Average Speed of Answer, Service Level.

Delay Announcements. Recorded announcements that encourage customers to wait for an agent to become available, ar may encourage them to have their account number ready or provide other information.

Dialed Number Identification Service (DNIS). A string of digits that the telephone network passes to the ACD, IVR or other device to indicate which telephone number the caller dialed. One trunk group can have many DNIS numbers. See Automatic Number Identification.

Dialer. Dialers are technologies for automating the process of making outbound calls.

Direct Message. In social media, private messages to specific individuals or organizations.

Directed Dialog. Speech recognition approach that identifies what is being said based on guided or structured interactions The caller is given examples of phrases to use. Also referred to as structured language. See Speech Recognition, Natura Language. (Vanguard)

Disaster Recovery Plan. See Business Continuity Plan.

Display Board. See Readerboard.

Double Jack. The ability to plug two headsets into one telephone or workstation so that two people can listen to or participate in the same contact.

Driver-Based Forecasting. A form of explanatory forecasting. Any method of workload forecasting that is based on other identified activities or “drivers.” See Forecasting Methodologies.

Dual-Tone Multifrequency (DTMF). A signaling system that sends pairs of audio frequencies to represent digits on a telephone keypad. It is often used interchangeably with the term Touch-Tone (an AT&T trademark).

Elearning. See Technology-Based Training.

Email Response Management System (ERMS). A system that tracks and manages email contacts, similar to how an ACD tracks and manages inbound calls. See Omnichannel.

Embedded Media. Digital media that is displayed outside of its usual setting, such as a YouTube video shared in a tweet.

Emoji. Images used to convey emotions in digital communication (text messages, social media, etc.).

Employee Advocate. An employee who promotes and defends the company they work for, similar to customers who are brand advocates. Related term: Customer Advocacy.

Employee Engagement. Quantitative representation of the enthusiasm or emotional commitment an employee has to the organization and the work they do.

Employee Experience (EX). Similar to customer experience, but for employees. How employees perceive their total interactions with an organization. See Employee Engagement.

Empowerment. The authority and means provided to employees or customers to make decisions and take action.

Engagement Rate. The percentage of users who see a social media post and take action (e.g., share, reply or click to co the organization).

Engset Calculation. Named after its developer, T. O. Engset, determines the probability of congestion occurring within a circuit group. Similar to Erlang B, though assumes a finite number of callers.

Enterprise Resource Planning (ERP). Generally refers to a system that manages back office functions. Related terms: Back Office, Front Office.

Envelope Strategy. A scheduling approach whereby enough agents are scheduled for the day or week to handle custome contacts and other types of work. Priorities are based on inbound workload. When the workload is heavy, all agents hand contacts, but when it is light, some agents are reassigned to work that is not as time-sensitive. Related term: Net-Zero Sta

Ergonomics. The science of fitting the workstation/work environment to the worker.

Erlang. One hour of telephone traffic in an hour of time. For example, if circuits carry 120 minutes of traffic in an hour, that’s two Erlangs. Related terms: Erlang B, Erlang C, A.K. Erlang (listed as Erlang, A.K.).

Erlang, A.K. A Danish engineer who worked for the Copenhagen Telephone Company in the early 1900s and developed Erlang B, Erlang C and other traffic engineering formulas. Related terms: Erlang, Erlang B, Erlang C.

Erlang B. A formula widely used to determine the trunks required to handle a known trunk load during a one-hour period. The formula assumes that if callers get busy signals, they go away forever, never to retry (“lost calls cleared”). Because s callers retry, Erlang B can underestimate trunks required. However, Erlang B is generally accurate in situations with few b signals. Related terms: Bandwidth Calculator, Erlang C, Trunk Load.

Erlang C. Calculates expected waiting times (delay) based on three things: the number of servers (agents); the number o

people waiting to be served (customers); and the average amount of time it takes to serve each person (average handling can also predict the resources required to keep waiting times within targeted limits. Erlang C assumes no abandoned con busy signals, so it has a tendency to overestimate staff required. Related terms: Computer Simulation, Erlang B, Service

Error Rate. In a contact center, the number or percentage of defective (e.g., incomplete) interactions or the number or percentage of defective steps in an interaction.

Escalation. The process by which a customer contact is transferred to a specialist or a more senior representative (such a supervisor or manager) to handle or resolve an issue.

Escalation Plan. A plan that specifies actions to be taken when workload queues begins to build beyond acceptable levels See Real-Time Management.

Event-Driven Forecasting. Any method of workload forecasting that is based on individual activities that generate contacts. See Forecasting Methodologies.

Exchange. In chat, a part of a session that begins with an inquiry from the customer and concludes with a response from agent. See Chat for related terms.

Exchange Handle Time. In chat, the time it takes for the agent to prepare and deliver a response during an exchange. Se Chat for related terms.

Exchange Line. See Trunk.

Exchange Response Time. In chat, the time that elapses between the customer sending a question or comment and the delivery of the agent's response. See Chat for related terms.

Exit Interviews. Interviews with employees who are leaving the company or department, to gain candid and honest insigh into why they are leaving, and ways the organization might improve to minimize turnover in the future. See Stay Interview

Expected Wait Time (EWT). A prediction of the wait time a customer can expect when entering a queue. Many contact center systems are capable of estimating wait times and announcing them to customers. Expected wait announcements a always used as part of Virtual Hold. Related terms: Queue, Visible Queue, Virtual Hold.

Explanatory Forecasting. See Forecasting Methodologies.

Fast Clear Down. A caller who hangs up immediately after hearing a delay announcement. Related term: Delay Announcement.

Finesse Standards. Quality standards that measure how something was done. Performance can happen in degrees, and finesse standards are usually measured on scales (often three- or five-point scales). Related terms: Foundation Standard Standards.

First Contact Resolution. The percentage of contacts that are handled to completion in the initial interaction. The custome does not need to contact the contact center again, nor does anyone within the organization need to follow up. Related ter and Rework.

First In, First Out (FIFO). With this approach, the first contact placed in queue is the first one out when an agent becomes available. Contacts are handled in the order received.

Flex Time Scheduling. Several weeks in advance, agents are promised schedules within a window of time (e.g., only Tuesdays through Saturdays or from 8 a.m. to 8 p.m. any day of the week), according to their personal availability. Then, work hours, and in some cases, days worked, are determined from week to week as forecasted staff requirements are ref approach may involve the entire staff, but usually includes only a subset of employees.

Flushing out the Queue. A real-time management term that refers to changing system thresholds so that calls waiting for agent group are redirected to another group with a shorter queue or more available agents. Related term: Real-Time Mar

Focus Group. A group of customers or prospects that participate in a discussion to provide candid feedback on the organization and/or its products and services.

Forecast Accuracy. Formulas that measure the accuracy of a forecast against what actually happened, down to the interv Related term: Forecasting Methodologies.

Forecasting Methodologies. Methods used to predict future events, such as the workload that will come into a contact center. Methodologies are broadly categorized into quantitative and judgmental approaches. Quantitative forecasts incluc series forecasts (which assume past data will reflect trends that continue) and explanatory forecasting (which attempts to linkage between two or more variables). Driver-based and event-driven forecasting approaches are variations of explanat forecasting. Judgmental forecasts go beyond purely statistical techniques, to involve intuition, interdepartmental committe market research and executive opinion. See Forecasting.

Foundation Standards. Quality standards that measure whether something was done. Performance can be objectively measured by a yes or no—the employee either did it or did not do it. Related terms: Finesse Standards, Quality Standard

Front Office. Generally refers to customer-facing services and technologies. Related term: Back Office.

Full-Time Equivalent (FTE). A term used in scheduling and budgeting, whereby the number of scheduled hours is divided by the hours in a full work week. The hours of several part-time agents may add up to one FTE.

Gate. See Agent Group.

Geotagging. Technology that adds information on location to a photo, video, or social media message. With GPS-enablec smartphones, geotagging has become a core aspect of social media, search, photographs and location-based marketing customer service.

Grade of Service (GOS). The likelihood that a call will not be connected to a system because all trunks are busy. Grade c service is often expressed as a probability, e.g., p.01, meaning 1 percent of calls will be blocked. Related terms: Erlang B Level, Trunk Load.

Handled Call. Also referred to as handled contact. A contact that is received and handled by an agent or self-service syst Related terms: Answered Call, Offered Call, Received Call.

Handling Time. For a phone call, the time an agent spends in talk time and after-call work handling an interaction. Handling time can also refer to the average time it takes for an agent to handle any kind of contact (text, social, email, etc time it takes for a machine to process a transaction. See Average Handling Time.

Hashtag. In social media, a word or phrase preceded by the hashtag symbol, which enables users to find, sort or identify groups or topics (e.g., #customerservice).

Histogram. A type of graph that illustrates the underlying frequency distribution (shape) of a set of continuous data.

Historical Forecasting. Any method of forecasting that relies on the past (e.g., trends and patterns) to determine future projections. See Forecasting Methodologies.

Historical Report. A report that tracks contact center or agent performance over a period of time. See Real-Time Report.

Hold Out Forecasts. Forecasting the past to see how well a forecast model will predict the future, being sure to only use data that would have been available in the past. Allows comparison of various forecast models to see which is more accu specific circumstances or environments.

Idle Time. Also referred to as wait time or in-between contacts. The time agents are available and waiting for contacts to arrive. The inverse of occupancy. See Occupancy.

Immutable Law. A law of nature that is fundamental and not changeable (e.g., the law of gravity). In an inbound contact center, the fact that occupancy goes up when service level goes down is an immutable law. See Queue Dynamics.

In-Between Contacts. See Idle Time.

Increment. See interval.

Incremental Revenue (Value) Analysis. A methodology that estimates the value (cost and revenue) of adding or subtracting an agent.

Index Factor. In forecasting, a proportion used as a multiplier to adjust another number.

Information Technology (IT). A generic term that refers either to computer and/or communications systems and technologies, or to the profession that develops and manages these systems.

Instructor-Led Training (ILT). Training delivered by an instructor. See Technology-Based Training.

Integrated Services Digital Network (ISDN). A set of international standards that enable digital communication. ISDN is still in use but is being replaced by newer approaches.

Intelligent Routing. The use of information about the customer, current conditions or other parameters to route contacts to the appropriate group, individual, automated system, etc.

Intelligent Virtual Assistant (IVA). Bots that emulate human conversations, and used in customer service, technical support, marketing and other applications. The term is often used to describe advanced chatbot applications. Related terr Chatbot, Robotic Process Automation.

Interactive Voice Response (IVR). An IVR system responds to caller-entered digits or speech recognition in much the same way that a conventional computer responds to keystrokes or clicks of a mouse. When the IVR is integrated with dat applications, customers can interact with databases to check current information (e.g., account balances) and complete transactions (e.g., make transfers between accounts). Related term: Speech Recognition.

Interexchange Carrier (IXC). A long-distance telephone company.

Internal Part-Timers. A scheduling approach, sometimes called the reinforcement method. Employees working on other tasks are used as reinforcements when the call load gets heavy. Related terms: Schedule, Schedule Alternatives.

Internet “Call Me” Interaction. Allows a user to request a callback from the contact center, while exploring a web page.

Internet “Call-Through” Interaction. Refers to the ability for customers to click a button on a website and be connected to an agent (initiate a voice conversation) while viewing the site. Also referred to as “click-to-talk.”

Internet of Things. Extending Internet connectivity to everyday objects such as washing machines, doorbells and refrigerators.

Internet Protocol (IP). The set of communication standards that control communications activity on the Internet. An IP address is assigned to every device on the Internet.

Interval. Also called increment. The timeframe used for staffing and reporting. In contact centers, 30-minute intervals are common, but intervals can be 15 minutes for large centers or 60 minutes for small contact centers or those that have rela long average handle times.

Interval-Based Accuracy. A method of measuring forecast success that focuses on results by interval (usually half hours) rather than end of day, week or month results. See Forecasting Methodologies.

Intraday Forecast. A short-term forecast that assumes activities early in the day will reflect how the rest of the day will go.

Intraflow. See Overflow.

Intraweek Forecast. A short-term forecast that assumes activities early in the week will reflect how the rest of the week will go.

Invisible Queue. When customers do not know how long the queue is or how quickly it is moving. Related terms: Expecte Wait Time, Queue, Visible Queue.

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Job Description. An outline of the functions, responsibilities and requirements of a specific job.

Job Role. The function or responsibilities related to a specific position in an organization.

Journey Mapping. A visual tool used by organizations to tell the story of a particular type of customer's experience.. (CX Accelerator)

Judgmental Forecasting. Goes beyond purely statistical techniques and encompasses what people believe is going to happen. It is in the realm of intuition, interdepartmental committees, market research and executive opinion. Related term Quantitative Forecasting, Forecasting Methodologies.

Key Performance Indicator (KPI). A high-level measure of contact center performance. Some interpret KPI as the single most important measure in a department or unit; however, in common usage, most centers have multiple KPIs. See Perfo Objective.

Knowledge Management. Developing and leveraging an organization's knowledge resources to prevent the need for employees to "reinvent the wheel."

Law of Diminishing Returns. The declining marginal improvements in service level that can be attributed to each additional agent, as successive agents are added. Related terms: Immutable Law, Power of One.

Lean Six Sigma. A disciplined variation of Six Sigma that focuses on the elimination of different kinds of waste in production and service delivery. Related terms: System of Causes, Process, Six Sigma.

Least-Occupied Agent. A method of distributing contacts to the agent who has the most idle time (lowest occupancy) in a given period of time. Related terms: Longest-Available Agent, Next Available Agent. (Vanguard)

Leave Without Pay (LWOP). Agents are offered the chance to leave work early, without pay, when workload is light. Pronounced "el-wop." Related terms: Schedule, Schedule Alternatives.

Legacy Systems. Information systems or databases that house vital business information, such as customer records, but are based on old technologies (e.g., mainframes, mini-computers). (Vanguard)

Like. In social media, an expression of support for content. As with shares, comments, and favorites, likes can be tracked an indication of engagement.

Load Balancing. In a network contact center, load balancing is the process of distributing (balancing) contacts between sites. Related terms: Contact-by-Contact Routing, Network, Network Control Center, Network Interflow, Percent Allocatio

Local Area Network (LAN). The connection of multiple computers within a building so that they can share information, applications and peripherals. Related term: Wide Area Network.

Location-Based Services. Services that are appropriate for or customized for specific locations. See Geotagging.

Logged On. A state in which agents have signed on to a system (made their presence known) but may or may not be rea to handle contacts.

Logical Agent. An agent identified by their login code, not by their physical position or phone number. See Agent Group. (Vanguard)

Long Call. For staffing calculations and traffic engineering purposes, contacts that have average handling times that approach or exceed 30 minutes. See Average Handling Time.

Longest-Available Agent. Also referred to as most-idle agent. A method of distributing contacts to the agent who has bee in the idle status the longest. With a queue, longest-available agent becomes next available agent. Related term: Next Av Agent.

Longest Delay. Also called oldest call. The longest time a customer has waited in queue, before abandoning or reaching a agent. See Service Level.

Look-Ahead Queuing. The ability for a system or network to examine a secondary queue and evaluate the conditions before overflowing contacts from the primary queue.

Look-Back Queuing. The ability for a system or network to look back to the primary queue after the contact has been overflowed to a secondary queue and evaluate the conditions. If the congestion clears, the contact can be sent back to th queue.

Lost Call. See Abandoned Contact.

Machine learning (ML). Technology that enables programs to access and use data on their own, learn for themselves, an improve as they learn.

Make Busy. To make a circuit or terminal unavailable.

Manual Answer. The ACD system is set up so that agents must manually answer calls. See Call Forcing.

Manual Available. The ACD system is set up so that agents must put themselves back into the available mode after talk time or completing any after-call work. See Auto-Available.

Measure. A fundamental, quantifiable unit, such as length, amount or size. Examples include the time it took to process a claim, and number of customers served. See Metric.

Mention. In social media, tagging a user's or an organization's account name or handle in a message. See Sentiment Analysis.

Metric. A quantifiable value that is often composed of more than one measure. For example, average cost of a service interaction incorporates both costs and the number of interactions. See Measure.

Modem. A contraction of the terms modulator/demodulator. A modem converts data from transmission media so that it ca be transmitted.

Modular Jack. An interface that permits easy interconnection of devices or circuits.

Moments of Truth. The points in a customer relationship in which a business has the largest opportunity to either increase or decrease customer loyalty. (CX Accelerator)

Monitoring. Increasingly referred to as service observing or service evaluation. Monitoring is an evaluation process that appraises the qualitative aspects of handling contacts. Related terms: Calibration, Coaching, Contact Quality.

Monitoring System. A system that records contacts in order to have a permanent record of the complete interactions and improve quality. See Monitoring.

Most-Idle Agent. See Longest-Available Agent.

Multichannel. A contact center that enables agents and customers to interact over multiple communication channels—e.g phone, chat, text, email, social media or others. As industry terminology has evolved, multichannel refers to the ability to c multiple channels, while omnichannel generally refers to a deep level of integration among channels, enabling them to wo together seamlessly. See Omnichannel.

Multichannel Attribution. In marketing, analytics that aim to understand how customers discover, evaluate, purchase, and use products or services. (Example: seeing a product in a social post, doing a search, visiting the website, making an inqu through chat or call, and then making a purchase online or in a retail store.)

Multimedia. Combining multiple forms of media in the communication of information (e.g., a traditional phone call is "monomedia," and a video call is "multimedia").

Multimedia Routing and Queuing. Systems and processes that handle contacts from various channels (phone, text, chat and others) based on business rules that define how any transaction, inquiry or problem is processed. See Omnichannel.

Mystery Shopper. A type of monitoring in which a person acts as a customer, initiates a contact to the center and assesse processes and the skills of the agent. See Monitoring.

Natural Language. Technology used in speech or text recognition that identifies what is being said or requested through free-form communication. No structure or specific words or phrases are required. Related terms: Directed Dialog, Speech Recognition. (Vanguard)

Natural Language Processing (NLP). Enables computers to interpret, analyze and process human language. See Natural Language.

Nesting. A transition between training and working independently, when a new hire handles work alongside a trainer or experienced agent who provides help as needed.

Net Present Value. A method of determining the attractiveness of investments. The value of future cash flows over the life of an investment, discounted to the present.

Net Promoter Score (NPS). A specific methodology of gauging customer experience, based on the survey question "How likely is it that you will recommend us to others?"

Net-Zero Staffing. Creating staff schedules for peak hours and using the overages for coaching, projects, etc. so that eac interval gets to a net of zero staffing. Related term: Envelope Strategy.

Network. The interexchange (IXC) or cloud-based services that route contacts into a center or among several centers.

Network Control Center (NCC). Also called traffic control center or network operations center. A control center that oversees and manages a distributed contact center.

Next Available Agent. A contact distribution method that sends contacts to the next agent who becomes available. When there is no queue, next available agent reverts to longest-available agent. Related term: Longest-Available Agent.

Non-ACD In Calls. Inbound calls that are directed to an agent's extension rather than to a general group. These may be personal calls or calls from customers who dial the agents' extension numbers.

Normalized Contacts Per Agent. Also called true contacts (or calls) per agent. It is actual contacts an individual or group handled divided by occupancy for that period of time. Related term: Adherence to Schedule, Occupancy.

Not Ready. See After-Call Work.

Occupancy. The percentage of time agents handle contacts versus wait for contacts to arrive; the inverse of occupancy is idle time. For a half hour, the typical calculation is: (contact volume × average handling time in seconds) / (number of age 1,800 seconds). Related terms: Adherence to Schedule, Utilization, Idle Time.

Off-Peak. Periods of time other than the contact center's busiest periods. Also a term to describe periods of time when lo distance carriers or utilities provide lower rates.

Offered Call. Offered calls (offered contacts) include all of the attempts callers make to reach the contact center. There ar three possibilities for offered calls: 1) they can get busy signals; 2) they can be answered by the system, but hang up befo reaching an agent; or 3) they can be answered by an agent. Related terms: Answered Call, Handled Call, Received Call.

Omnichannel. Systems and methodologies that integrate multiple contact channels into a common queue and shared contact-handling approach, to create a seamless customer experience regardless of channel. Customers may start out in channel (e.g., a social platform or website) and move to another (e.g., phone, text, or chat); regardless, an omnichannel a enables the organization and customers to interact seamlessly across channels. See Multichannel.

Onboarding. The process integrating a new employee into an organization and its culture (e.g., through orientation, training, nesting, etc.). May also refer to familiarizing new customers or clients with the organization's products and servic

On-the-Job Training (OJT). A method of training that exposes the employee to realistic job situations through observation, guided practice, and while working on the job.

Open Ticket. A customer contact (transaction) that has not been completed or resolved (closed). Related terms: First Contact Resolution, Response Time.

Outsourcing. Contracting some or all contact center services and/or technology to an outside company. The company is generally referred to as an outsourcer, service partner, or service bureau. See Insourcing.

Overflow. Contacts that flow from one agent group or site to another, based on current queue conditions.

Overtime. Time beyond an established limit (e.g., working hours in addition to those of a regular schedule or full work week, such as a 40-hour work week).

Pareto Chart. A bar chart that ranks events in order of importance or frequency.

Peaked Call Arrival. A surge of traffic beyond random variation. It is a spike within a short period of time. There are two types of peaked traffic—the type you can plan for, and situations that are impossible to predict. Related term: Interval.

Percent Allocation. A contact routing strategy sometimes used in multisite environments. Contacts received in the networ are allocated across sites based on user-defined percentages.

Performance Objective. Usually stated as a quantifiable goal that must be accomplished within a given set of constraints, specified period of time, or by a given date (e.g., reduce turnover by 20 percent within one year).

Performance Standards. See Quality Standards.

Performance Target. An interim improvement point at a specific point in time, when striving to attain a new level of performance. Related terms: Key Performance Indicator, Performance Objective.

Personalization. Customizing services for the needs and characteristics of individual customers, e.g., an IVR greeting tha recognizes customers by name, or web pages tailored to individuals.

Pivot. A term sometimes used to refer to when a consumer changes their channel of communication with an organization e.g., from chat to call. Related terms: Channel Hopping, Omnichannel.

Poisson. A formula sometimes used for calculating trunks. Assumes that if callers get busy signals, they keep trying until they successfully get through. Because some callers won't keep retrying, Poisson can overestimate trunks required. Rela terms: Erlang B, Retrial Tables, Trunk Load.

Pooling Principle. Also referred to as the powerful pooling principle. It states: any movement in the direction of consolidation of resources will result in improved traffic-carrying efficiency. Conversely, any movement away from consolidation of resources will result in reduced traffic-carrying efficiency. A common contact center application is that if y take several small, specialized agent groups, effectively cross-train them and put them into a single group, you'll have a m efficient environment (if all other things are equal). Related terms: Agent Group, Queue Dynamics, Skills-Based Routing.

Post-Call Processing (PCP). See After-Call Work.

Power of One. A reference to the dynamic that at low service levels, adding even one more agent can greatly improve service level.

Priority Queuing Application. Programming that recognizes and “bumps” higher-value customers or those with more urgent needs up in the queue to ensure that they receive the most expedited service possible.

Private Branch Exchange (PBX). Also called private automatic branch exchange (PABX) or switch. A telephone system located at the contact center’s site that handles incoming and outgoing calls. ACD software can provide PBXs with ACD functionality. See Automatic Call Distributor.

Private Network. A communications network established for the exclusive use of an organization or group of affiliated organizations.

Process. A system of causes. See System of Causes.

Process Mapping. A technique used to visually depict how work is done. Shows how events, resources, timelines and oth

variables interact to achieve a predictable outcome. (CX Accelerator)

Products or Services Per Customer. A performance measure—a simpler variation of sales per customer—products or services per customer can be a measure of cross-selling effectiveness. Related term: Sales Per Customer.

Profit Center. An accounting term that refers to a department or function in the organization that generates profit. While contact centers that are considered profit centers keep an eye on expenses, they emphasize and track activities that proc
for customers and the organization. Related term: Cost Center.

Prompted Digits. See Customer-Entered Digits.

Propensity to Contact. The likelihood or number of times customers contact the organization, typically on an annual basis
Typically, a numerical correlation between total contacts and total customers—for example, 4 would mean customers con
organization an average of four times per year.

Qualitative Analysis. Analysis that interprets descriptive data and is usually expressed as text. Related term: Quantitative Analysis.

Quality. The attributes or characteristics of a product or service. See Quality Standards.

Quality Assurance. Also referred to as Quality Analysis. See Monitoring.

Quality Assurance Scorecard. A dashboard of metrics related to quality. See Quality Standards.

Quality Management System. Can refer to either the technologies that enable quality management or, more often, the totality of the technologies, tools and methods an organization uses to manage and improve quality.

Quality Monitoring. See Monitoring.

Quality Standards. Also referred to as performance standards. The requirements, specifications, guidelines or characteristics established for customer service and customer experience.

Quantitative Analysis. Analysis that focuses on numerical, mathematical or statistical data. Related term: Qualitative Analysis.

Quantitative Forecasting. Also known as statistical forecasting. Using statistical techniques to forecast future events. The major categories of quantitative forecasting include time series and explanatory approaches. Time series techniques use trends to forecast future events. Explanatory techniques attempt to reveal linkages between two or more variables. Relate
Forecasting Methodologies, Judgmental Forecasting.

Queue. Queue literally means “line of waiting people.” Holds callers until an agent becomes available. Queue can also re
to a line or list of items in a system waiting to be processed (e.g., email or social media messages).

Queue Display. See Readerboard.

Queue Dynamics. Queue dynamics refers to how queues behave; e.g., when service level goes up, occupancy goes dow
Related terms: Occupancy, Service Level.

Random Contact Arrival. The normal, random variation in how incoming contacts arrive. See Erlang C, Service Level.

Readerboard. Also called display board, queue display, wallboard or electronic display. A visual display, mounted on the wall or ceiling of a contact center, that provides real-time and historical information on queue conditions, agent status and
center performance.

Real-Time Adherence Software. A function of workforce management software that tracks how closely agents adhere to their schedules. See Adherence to Schedule.

Real-Time Management. Making adjustments to staffing, schedules, priorities or systems in order to effectively respond t
real-time conditions. Related terms: Queue Dynamics, Real-Time Report, Service Level.

Real-Time Report. Information on current conditions (e.g., number of contacts currently in queue).

Real-Time Threshold. A marker that is identified in advance (e.g., number of contacts in queue, longest in queue, etc.) th
automatically initiates a certain response in a contact center.

Received Call. A call detected and seized by a trunk. Received calls will either abandon or be answered by an agent. Related terms: Answered Call, Handled Call, Offered Call.

Recorded Announcement. Announcements callers hear while waiting in queue. See Delay Announcement.

Resolution. A measure of when a problem or issue is actually resolved. Used in environments where the contact center's initial response may not fully resolve an issue. See Response Time.

Response Time. Expressed as "100 percent of contacts handled within N days/hours/minutes" (e.g., all email will be handled within 24 hours). It is the preferred objective for contacts that do not have to be handled when they arrive. See S Level.

Retention. The opposite of turnover; keeping employees in the contact center. See Turnover.

Retrial. Also called redial. When a person tries again to complete a call after encountering a busy signal.

Return on Investment (ROI). Strictly speaking, this is the net income or savings divided by the amount invested for a specific initiative. In contact center use, ROI has come to define an overall method of estimating the value of an investme

Right-Party Contact. When making outbound calls, the number of genuine contacts required to reach the desired party/decision maker. It is a sum of the total contacts made until the person that you are targeting is reached.

Ring Delay. See Dynamic Answer.

Ring No Answer (RNA). A call that rings but is not answered.

Robotic Process Automation (RPA). Software robots that automate tasks previously requiring humans—finding and maintaining information, calculations, transactions, and others. Related term: Intelligent Virtual Assistant (IVA).

Roll Over No Answer (RONA). A call that overflows to a secondary answer group but is not answered.

Root Cause. A primary cause of a problem or outcome. Can be identified through root cause analysis. See System of Causes.

Rostered Staff Factor (RSF). Alternatively called overlay, shrink factor or shrinkage. RSF is a numerical factor that leads to the minimum staff needed on schedule over and above base staff required to achieve your service level and response objectives. It is calculated after base staffing is determined and before schedules are organized, and accounts for things l breaks, absenteeism and ongoing training. Related term: Base Staff.

Round-Robin Distribution. A method of distributing contacts to agents according to a predetermined list. Related terms: Next Available Agent, Longest-Available Agent.

Scatter Diagram. A quality tool that assesses the strength of the relationship between two variables. Is used to test and document possible cause-and-effect scenarios. See System of Causes.

Schedule. A plan that specifies when employees will be on duty, and that may indicate specific activities that they are to handle at specific times. A schedule generally includes the days worked, start times and stop times, breaks, paid and unp status, etc. See Schedule Alternatives.

Schedule Compliance. See Adherence to Schedule.

Schedule Efficiency. The percentage of intervals that are properly staffed. The measure is based on the difference betwe the number of staff actually scheduled and the number of staff actually required.

Schedule Exception. An activity not planned in an employee's schedule that becomes an "exception" to the plan. Related terms: Adherence to Schedule, Schedule, Schedule Alternatives.

Schedule Horizon. How far in advance schedules are determined.

Schedule Preference. A description of the times and days that an employee prefers to work. Related terms: Schedule, Schedule Horizon.

Schedule Trade. When agents are allowed to trade or "swap" schedules.

Scheduled Callback. A specified time that the contact center will call a customer, usually based on the customer's preferences.

Scheduled Staff vs. Actual. A performance measure that is a comparison of the number of agents scheduled versus the number actually in the center, involved in the activities specified by the schedule. Related term: Adherence to Schedule.

Screen Monitoring. A system capability that enables a supervisor or manager to remotely monitor the activity on agents' computer terminals. See Monitoring.

Screen Pop. A CTI application that delivers an incoming call to an agent, along with the data files pertaining to that call or caller. See Computer Telephony Integration (CTI).

Screen Refresh. The rate at which real-time information is updated on a display (every 5–15 seconds is common). Scree refresh does not correlate with the timeframe used for real-time calculations.

Seated Agents. See Base Staff.

Self-Service System. Systems that enable customers to access the information or services they need without the help of agent.

Sentiment Analysis. Tools and methodologies used to assess the nature of a customer’s views and feelings about an organization’s products, services and brand. Related terms: Analytics, Influencer, Sentiment Aggregator, Social Media.
Service Bureau. See Outsourcing.
Service Level. Also called telephone service factor (TSF). A measure of how quickly contacts reach agents, service level expressed as: “X percent of contacts answered in Y seconds”; e.g., 90 percent answered in 20 seconds. Contacts that mu handled when they arrive require a service level objective, and those that can be handled at a later time require a respons objective. See Response Time.
Service Level Agreement (SLA). An agreement—between departments within an organization or between a client organization and an outsourcer—that defines performance objectives and expectations.
Service Observing (or Service Observation). See Monitoring.
Session. The whole of an interaction, from “hello” to “goodbye.” Relates to chat or other customer interactions that require back and forth exchanges with customers. See Chat for related terms.
Session Handling Time. The cumulative total of the exchange handling times for the session. Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related terms.
Session Response Time. The time it takes the organization to respond to the initial request for a session from the custom Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related
Session Transaction Time. The time elapsed from the beginning of the initial exchange to close-out. Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related terms.
Shift Differential. An additional amount paid to agents who staff difficult times, such as overnight or weekends, or to agents with specific skill sets (e.g., bilingual).

Short Messaging Service (SMS). The communications protocol that mobile carriers employ to enable users to send and receive text messages.
Shrinkage. Includes all activities that takes an agent away from being available to handle contacts. Shrinkage factors include vacation, breaks, training, and other variables. See Rostered Staff Factor.
Silent Monitoring. See Monitoring.
Simple Smoothing. A statistical model used in forecasting. In simple smoothing, the average of actual volumes for a set number of past weeks is used to forecast the workload for the next week.
Simultaneous Contacts. When customers contact the organization through multiple channels, e.g., they send an email, te and call, all at the same time in an attempt to see which alternative results in the fastest or most desirable response. Rela Channel Hopping.
SIP Trunk. See Trunk.
Six Sigma. A disciplined process that focuses on developing and delivering near-perfect products and services. Sigma is statistical term that measures process variation. Lean Six Sigma is a variation of Six Sigma that focuses on the eliminatio waste. See System of Causes.
Skill Group. See Agent Group.
Skill Path. Skill paths focus on the development of specific skills rather than the progression of positions through the contact center and/or organization. See Career Path.
Skills-Based Routing. An ACD capability that matches a customer’s specific needs with an agent that has the skills to handle that contact, on a real-time basis. Related terms: Agent Group, Pooling Principle.
Smooth Call Arrival. Calls that arrive evenly across a period of time. Virtually nonexistent in incoming contact centers. See Random Contact Arrival.
Social Listening. The process of finding and assessing what is being said and written in social media about an organizatio product, service, person or other topic.
Social Media Management. The technologies and processes for managing social media, engaging audiences and measu results.
Softphone. The ability to access telephony functions through a personal computer interface instead of a telephone. (Vanguard)
Software as a Service. See Cloud-Based Services.
Span of Control. The number of individuals a manager supervises. A large span of control means that the manager supervises many people. A small span of control means that he or she supervisors fewer people.
Special Causes. Variation in a process caused by special or unusual circumstances. Related terms: Common Causes, Control Chart.

Speech Analytics. Broadly refers to analytics applied to speech content, e.g., to call recordings. Related terms: Analytics, Text Analytics.

Speech Recognition. Speech recognition enables IVR systems to interact with databases using spoken language, rather the telephone keypad. There are two major types of speech recognition used in contact centers: 1) directed dialogue or st language, which is prompting that coaches the caller through the selections; and 2) natural language, which uses a more ended prompt, recognizing what the caller says without as much coaching. See Natural Language, Interactive Voice Resp

Split. See Agent Group.

Split Shifts. Schedule in which agents work a partial shift, take part of the day off, then return later to finish their shift.

Related terms: Schedule, Schedule Alternatives.

Staff Sharing. When two or more organizations (or different units of an organization) share a common pool of employees, typically to meet seasonal demands. Related terms: Schedule, Schedule Alternatives.

Staff-to-Supervisor Ratio. See Span of Control.

Staffing Model. A statistical model that provides a quick and easy way to determine the staff required to handle a given workload at a desired level of service, while accounting for the variables and responsibilities that keep agents from handli contacts.

Staggered Shifts. Shifts across a team or agent group that begin and end at different times. For example, one shift begins 7 a.m., the next at 7:30 a.m., the next at 8 a.m., until the agent group is fully staffed for the busy midmorning traffic. Relat terms: Schedule, Schedule Alternatives.

Standard. When related to customer service, standards refer to the requirements, specifications, guidelines or characteris you establish for customer service and the experiences you want to create.

Stay Interviews. Intentional conversations with employees on why they stay—what they like about their jobs, the organization's culture and benefits, career development opportunities that could further engage them, etc. See Exit Interv

Strategic Staffing Plan. A forecast of future staffing requirements—which includes quantity and qualifications—generally over a one- to three-year timeframe. Related terms: Full-Time Equivalent, Schedule Alternatives.

Structured Feedback. Feedback that comes in an organized manner, the result of directly soliciting input from customers employees. Surveys are a common example. See Unstructured Feedback.

Supervisor. The person who has frontline responsibility for a group of agents. Related terms: Job Role, Monitoring, Span Control.

Supervisor Monitor. Computer display that enables supervisors to monitor the contact handling statistics and schedules o their supervisory groups or teams.

Support Center. Term used to incorporate the multiple meanings for help desk, service desk and contact center, which provides technical support to internal "end user" employees or external customers. Related term: Contact Center. (HDI)

SWAT Team. The term some companies use for a team of employees not normally part of the contact center to act as "reservists" and be quickly reassigned to help handle contacts if needed. Related term: Schedule.

System of Causes. The variables that are part of a process. A contact center is a process or system of causes. See Proc

Talk Time. Also referred to as direct call processing. Everything from "hello" to "goodbye" in a call. In other words, it's the time customers are connected with agents. Related terms: After-Call Work, Average Handling Time, Call Load.

Technology-Based Training (TBT). Also called elearning. Training that uses technology to deliver instruction, typically outside of the formal classroom environment. TBT can include computer-based training (CBT) or other technologies such video or virtual reality. Related terms: Computer-Based Training, Instructor-Led Training.

Telemarketing. Generally refers to outbound calls for the purpose of selling products or services, or placing informational calls to customers, prospective customers or constituents.

Telephone Sales or Service Representative (TSR). See Agent.

Telephone Service Factor (TSF). See Service Level.

Temporary Employee. An employee hired for short-term projects or seasonal workloads.

Text Analytics. Broadly refers to analytics applied to text content, e.g., email or calls that have been converted into text documents. Related terms: Analytics, Speech Analytics.

Text Messaging. Composing and sending short electronic messages between two or more users on mobile or other devic See Short Messaging Service (SMS).

Text-to-Speech (TTS). Enables a voice processing system to speak the words in a text field using synthesized—not recorded—speech. Also used to "read" email or other text-based information over the telephone. (Vanguard)

Thread. A string of messages that make up a conversation, common in most forms of online communication.

Threshold. The point at which an action, change or process takes place.

Tiered Scheduling. An approach to allocating resources that defines a range of staffing requirements for a given time interval and places individuals in separate groups (tiers) within that range. For example, tier 1 may be scheduled for phon regardless of queuing conditions, but tier 3 won’t sign on unless there are 15 or more contacts waiting in queue. Related t Schedule, Schedule Alternatives.

Time Series Forecasting. See Forecasting Methodologies.

Time to Proficiency. The time needed or taken by an individual to acquire the skills and knowledge needed to meet a specified level of performance.

Top-Down Forecasting. A methodology of predicting contacts that starts at the highest level and works down to intervals. For example, forecasting months, then breaking down to weeks, days, and intervals. See Bottom-Up Forecasting.

Touch-Tone. A trademark of AT&T. See Dual-Tone Multifrequency.

Touchpoints. The different points in which a customer interacts with a business. Touchpoints are commonly used as part the journey mapping process and typically include three phases—before purchase, during purchase, and after purchase. Accelerator)

Training Evaluation. The process of assessing the impact of a training program. There are generally four levels of evaluation: level 1: reaction; level 2: learning evaluation; level 3: application to job; and level 4: evaluating the impact and

Transfer. Moving a contact to another person or agent group. With warm transfers, the original agent stays on the line to introduce the customer or issue to the agent receiving the transfer. In cold transfers, the original agent transfers the intera with no introduction.

Trend Analysis. Analysis that examines past and current activity to predict the future.

Trending. A topic that is popular on social media at a given moment.

True Calls Per Agent. See Normalized Calls Per Agent.

Trunk. Also called a line, exchange line or circuit. A telephone circuit linking two switching systems. SIP trunking enables the ACD to send and receive calls via the Internet. See Trunk Load.

Trunk Group. A collection of trunks usually used for a common purpose. Related term: Trunk.

Trunk Load. The load that trunks carry. Includes both delay and talk time.

Turnover. Also referred to as attrition. When a person leaves the contact center or department. Turnover can be categoriz as voluntary (when the employee decides to leave) or involuntary (when management makes the decision for the employ leave). It can also be categorized as internal (the employee leaves for another position within the organization) or externa employee leaves for another organization).

Unavailable Work State. An agent work state used to identify a mode not associated with handling telephone calls.

Unified Reporting. When data from different channels and systems are included on one reporting tool. This supports bette analysis and decision-making. See Dashboard.

Uniform Call Distributor (UCD). A simple system that distributes calls to a group of agents and provides some reports. See Automatic Call Distributor.

Universal Agent. Also known as super agent. Refers to either: 1) an agent who can handle all types of issues, or 2) an ag who can handle all channels of contact (e.g., calls, email, text, social media and others).

Unstructured Feedback. Feedback from customers that is not organized into predefined categories or responses—for example, a social media post. It comes in many forms and tends to be impromptu. See Structured Feedback.

Upsell. A suggestive selling technique of offering more expensive products or services to current customers during the sa decision. See Cross-sell.

User-Generated Content. Content that is created and published online by the users of a social or collaboration platform.

Utilization. The percentage of time that an agent is either handling or available to handle customer contacts, out of the tot time they are paid to be in the contact center. See Occupancy.

Variance Report. A report illustrating the difference between projected and actual results.

Vendor. A third-party, external company that supplies goods or services to the contact center, support center or customer

Video Chat. A communication channel that enables interactions that include audio and video.

Virtual Contact Center. A distributed contact center (call center) that acts as a single site for call handling and reporting purposes.

Virtual Hold. Technology that enables customers entering a queue to keep their place in queue, leave a number for callback, and be connected to an agent (receive a call from the organization) when the next agent becomes available. Th usually presented with the option of a callback once expected wait time is relayed to them. Related terms: Expected Wait Visible Queue.

Virtual Interviewing. Systems that ask candidates interview questions and record their answers for viewing at the organization’s convenience.

Virtual Reality (VR). An immersive, interactive, computer-generated experience. It can be similar to the real world—walking through an existing city or visiting a virtual store. Or VR can be otherworldly, e.g., with imaginary landscapes and different living creatures. With augmented reality (AR), elements of the real world are “augmented” by computer-generate information (for example, virtually trying on different outfits).

Visible Queue. When customers know how long the queue that they just entered is, and how quickly it is moving (e.g., the see a visual estimate or hear a system announcement that relays the expected wait time). Related terms: Expected Wait Invisible Queue, Queue.

Voice of the Customer (VOC). Broadly refers to tools, methods and collaboration that capture customers’ input and perceptions, seek to understand customer needs and wants, and use captured data to improve products, services and pr See Customer Experience.

Voice-over-Internet Protocol (VoIP). Transmitting voice conversations as packets of data from one communications device to another over a TCP/IP network. (Vanguard)

Voice Processing. An umbrella term that refers to any combination of voice technologies. See Interactive Voice Response

Voice Variables. Refers to voice qualities, such as volume, pitch, inflection, pause, pace, word emphasis, enunciation and others. Together, voice variables project an image to customers.

Voicebot. A voice-activated chatbot. See Chatbot.

Wait Time (Agents). See Idle Time.

Wallboard. See Readerboard.

Wallet Share. The portion of a customer’s total spending in a product category that goes to a company or product. See Market Share.

Web Call-Through. Using voice over Internet (VoIP) technology, the customer clicks a button that establishes a voice line directly to the contact center.

Web Callback. By clicking a button, the customer lets the company know that he/she wants to be called back either immediately or at a designated time.

Web Chat. See Chat.

Web Collaboration. A broad term referring to the ability for an agent and customer to share content by pushing/pulling we pages and/or whiteboarding and page markup.

Weighted Smoothing. A statistical model used in forecasting. As in simple smoothing, the average actual workload for a s number of past weeks is used to forecast the workload for the next week, but it is a weighted average, as each of the pas weighted so that older weeks weigh less heavily than more recent weeks. Weeks can be weighted based on events (such billing) that impact the workload for that week or simply based on length in the past.

Whisper Transfer. An IVR integration technique where the IVR temporarily connects to the agent and speaks the account number or other information before connecting the caller to the agent. (Vanguard)

Work State. An ACD-produced indicator of the status of a contact center agent’s activity or status. See Agent Status.

Workforce Management (WFM). The process of forecasting the workload and determining staff and schedule requirements to achieve service level goals.

Workforce Management System (WFMS). Software system that, depending on available modules, forecasts workload, calculates staff requirements, organizes schedules and tracks real-time performance of individuals and groups. See Work Optimization.

Workforce Optimization (WFO). A broad description of the latest generation of advanced workforce management and quality systems, which include features such as multichannel/omnichannel forecasting and scheduling, quality monitoring recording, scoring and coaching tools, analytics capabilities, technology-based learning, customer and employee surveys advanced reporting capabilities, and others. See Workforce Management.

Workload. Often used interchangeably with call load. However, workload can encompass all contact channels, and can a refer to activities not related to handling customer interactions. See Call Load.

Wrap-Up. See After-Call Work.

Wrap-Up Codes. Codes that agents enter to identify the types of contacts they are handling. The system can then genera reports on contact types by handling time, time of day, and other variables.

Y Jack. A device that splits a single port into two, allowing two headsets to be plugged into the same device.
Zip Tone. See Beep Tone

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