# *DRAFT Contact Center Agent Efficiency*

# *MAXDat Out-of-the-Box Presentation Objects*

# Overview

## Context

The purpose of the Agent Efficiency is to support analysis and comparisons, both inter and intra project, on where agents paid time is being spent. This module provides the ability to measure key summary metrics including occupancy, utilization, absenteeism, and direct labor time per contact. This module addresses the following types of operational analysis needs:

* Where / how are agents spending their time?
* Do I have projects, sites, agent groups, or individual agents that are statistically unusual with respect to labor time per contact?
* What is my direct labor cost per call?
* Are the types of activities agents are logging time against consistent with project, site, and agent groups’ goals?
* Are occupancy and utilization metrics achieving goals of the project, site, agent groups, or individual agents?
* Is the total agent logged in time consistent with the sum of the agent’s time in each activity?
* Are there trends in key metrics that indicate improving or declining performance?

The Agent Efficiency module can work “in concert” with other MAXDat contact center modules:

* **Contact Center Production Planning:** tracks forecasted contact arrivals against actual arrivals, supports optimizing staffing needs, and analysis of service level performance with contact data collected at (typically) 30 minute intervals.
* **CRM – Call Handling:** monitor and analyze customer contacts (calls, web chats) recorded in the CRM application from the time the contact is "handled" by project staff to the time it is completed, including the outcome, or actions taken by staff as a result of the interaction.
* **Task Management:** monitor all work tasks that are created by contact center agents for others (typically in the back office) to process or task that contact center agents are to perform when not handling inbound contacts.

## Business Purpose

**Not just “today” but long term trending**

The Agent Efficiency module integrates data from the ACD (Automatic Call Distributor), the WFM (Work Force Management) application, and (optionally) the Human Resources (HR) system in order to perform short and long – term trend analysis on where agent paid time is being spent.

The presentation objects (dashboards, reports and alerts) allow management to be informed on performance, spot trends, stay on top of issues, anticipate and address risks, and take actions at the earliest possible stage to minimize cost and ensure service delivery.

## Benefits

# Provides automatic detection of statistically valid high or low performing projects , sites, agent groups, or individual agents .

# Allows for projects, sites, agent groups, or agents to compare performance on standardized metrics.

# Organizes information in an easy to analyze format that preserves historically information on agent performance.

* Provides automated alerts that mitigates the need to review dashboard and reports frequently as well as establishes a standardized “action value”.

# Contact Center Agent Efficiency Out-of-the-Box Presentation Objects

The Agent Efficiency module includes a collection of “out of the box” dashboards, reports, and alerts in addition to a rich ad-hoc BI object building environment. These BI objects are primarily designed to provide contact center management staff with analysis of key agent performance against standardized metrics. Additionally, the “out of the box” objects provide the basis for mandatory state / client reports.

Table 2.1: Presentation Objects for Contact Center Agent Efficiency

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| --- | --- | --- | --- |
| Name | Business Purpose | Description | Consumer |
| **Dashboards** |  |  |  |
| Utilization and Occupancy Summary | Provide Contact Center Sr. Managers with statistical trending analysis into where agent paid time is being spent and ultimately determine and analyze labor time per call. Un-paid time, e.g., granted leave, is also tracked as it a component of labor time. | The following **data metrics** are displayed daily, weekly, monthly, or by selectable time period for each site and program across all agents:   * Scheduled Agent Time (WFM) * Actual Agent Time (ACD or WFM) * Scheduled PTO Time (WFM) * Unscheduled PTO (WFM) * Total Logged in Time (ACD) * Total “Ready Time” (Calculated from ACD) * Total “Not Ready” Time (ACD) * Calculated Logged in Time (Calculation - Ready Plus Not Ready Time) * Logged in Time Error (Calculation – Total Logged in Time – Calculated Logged in Time) * Breakdown of Logged in Time when “Ready” to Receive Contacts (all ACD)  1. Talk Time (ACD) 2. Hold Time (ACD) 3. After Call Work, i.e., Wrap Time (ACD) 4. External Talk Time (ACD) 5. Internal Talk Time (ACD) 6. Other Talk Time (ACD) 7. Ring Time (ACD) 8. Idle Time (ACD)  * Breakdown of “Not Ready” Time (All WFM – if available)  1. Training Time (WFM) 2. Meeting Time (WFM) 3. Lunch and Break Time (WFM) 4. Other (WFM)  * Utilization % (Calculation) * Occupancy % (Calculation) * Total Calls Handled (ACD) * Average Handle Time (ACD) * Labor Time per Call (Calculation) * Labor Cost per Call (Optional – only if HR data on hourly rate is available)   Utilization, Occupancy, and Labor Time per Call (across all agents in the selected “set”) are presented in separate statistical control charts where the x-axis is time – a month, week, or day. Statistically unusual trends are highlighted.  Additionally, all metrics are presented in a table matrix where a row is the metric, e.g., Total Logged in Time and the columns time periods. Values that are statistical likely due to “special causes” are highlighted. Sub “totals” (sum, percentages, or averages are included (if more than one row in a group) for, Site, Program, Manager and Supervisor. Grand “totals” are included for the entire data set.  **User input parameters (filters)** Program, Supervisor or Manager, and Time Period | Contact Center Sr. Management |
| Agent Level Utilization and Occupancy | Provide supervisors and managers who oversee a group of agents with statistical trending analysis into where individual agent paid time is being spent and ultimately determine and analyze labor time per call. | The dashboard is organized and presents the same metrics as the *Utilization and Occupancy Summary* (above) however the information is at the **individual agent level** with group totals at the Supervisor or Manager level. Additional user input parameters include Agent Name and Agent Group. | Supervisors and Front – Line Managers |
| Utilization and Occupancy Cross – Project Comparison Summary | Provide Sr. Managers and Executives ability to identify top – performing projects by comparing performance against standardized agent efficiency metrics. | The following **data metrics** are displayed weekly, monthly, or by selectable time period for each project selected (default is all projects within a region) across all agents:   * Scheduled Agent Time * Actual Agent Time * Scheduled PTO Time * Unscheduled PTO * Absenteeism Percentage * Total Logged in Time * Total Logged in Time - all “Ready” Status Codes * Total Logged in Time all “Not Ready” Status Codes * Utilization % * Occupancy % * Total Calls Handled * Average Handle Time * Labor Time per Call * Labor Cost per Call (Optional – only if HR data on hourly rate is available)   Utilization, Occupancy, and Labor Time per Call (across all agents in a project) are presented in separate statistical control charts for each project where the x-axis is time – a month or week. Statistically unusual trends are highlighted.  Additionally, all metrics are presented in a table matrix where a row is the metric, e.g., Total Logged in Time and the columns time periods. Values that are statistical likely due to “special causes” are highlighted. Sub “totals” (sum, percentages, or averages are included (if more than one row in a group) for each project. Grand “totals” are included across all projects.  **User input parameters (filters)** are Region, Project, Program, and Time Period | Manager, reporting analyst |
| **Reports** |  |  |  |
| Utilization and Occupancy Summary | Provide Contact Center Managers with trending analysis into where agent paid time is being spent and ultimately determine and analyze labor time per call in a printable format. This format can also be used to export data to Excel and other formats. | The following **metrics** are presented in a table matrix where a row is the metric, e.g., Total Logged in Time with the columns representing time periods (day, week, or month depending on time period selected).  Sub “totals” (sum, percentages, or averages are included (if more than one row in a group) for, Project, Program, Site, Manager, Supervisor and Agent Group. Grand “totals” are included for the entire data set.  **Metrics Included**:   * Scheduled Agent Time (WFM) * Actual Agent Time (WFM) * Scheduled PTO Time (WFM) * Unscheduled PTO (WFM) * Total Logged in Time (ACD) * Total “Ready Time” (Calculation from ACD) * Total “Not Ready” Time (ACD) * Calculated Logged in Time (Calculation - Ready Plus Not Ready Time) * Logged in Time Error (Calculation – Total Logged in Time – Calculated Logged in Time) * Breakdown of Logged in Time when “Ready” to Receive Contacts (all ACD)  1. Talk Time (ACD) 2. Hold Time (ACD) 3. After Call Work, i.e., Wrap Time (ACD) 4. External Talk Time (ACD) 5. Internal Talk Time (ACD) 6. Other Talk Time (ACD) 7. Ring Time (ACD) 8. Idle Time (ACD)  * Breakdown of “Not Ready” Time (All WFM – if available)  1. Training Time (WFM) 2. Meeting Time (WFM) 3. Lunch and Break Time (WFM) 4. Other (WFM)  * Utilization % (Calculation) * Occupancy % (Calculation) * Total Calls Handled (ACD) * Average Handle Time (ACD) * Labor Time per Call (Calculation) * Labor Cost per Call (Optional – only if HR data on hourly rate is available)   **User input parameters (filters)** are Project, Program, Supervisor or Manager, Agent Group, and Time Period |  |
| Project Comparison Summary | Provide Sr. Managers and Executives ability to identify top – performing by comparing projects against standardized agent efficiency metrics in a printable format. This format can also be used to export data to Excel and other formats. | The following **metrics** are displayed in a table matrix where a row is the metric, e.g., Total Logged in Time with the columns representing time periods (day, week, or month depending on time period selected) for each project selected (default is all projects within a region) across all agents.  Sub “totals” (sum, percentages, or averages are included (if more than one row in a group) for each project. Grand “totals” are included across all projects.  **Metrics Included**   * Scheduled Agent Time * Actual Agent Time * Scheduled PTO Time * Unscheduled PTO * Absenteeism Percentage * Total Logged in Time * Total Logged in Time - all “Ready” Status Codes * Total Logged in Time all “Not Ready” Status Codes * Utilization % * Occupancy % * Total Calls Handled * Average Handle Time * Labor Time per Call * Labor Cost per Call (Optional – only if HR data on hourly rate is available)   **User input parameters (filters)** are Region, Project, Program, and Time Period |  |
| **Alerts** |  |  |  |
| Agent Group Efficiency | Automated notification prevents the “missed” signal on overall agent efficiency in a dashboard or report from being overlooked. This automated monitoring mitigates the need to review dashboard and reports frequently as well as establishes a standardized “action value”. | If any of the following **data metrics** Utilization, Occupancy, or Labor Time per Call for defined agent groups, e.g., the agents that belong to a supervisor, or the agents working a given queue, demonstrate statistically valid “special cause” patterns / thresholds an alert will be emailed to the supervisor and manager of the agent group. Notified parties can use the Utilization and Occupancy dashboards or reports for additional details |  |
| Individual Agent Efficiency | Automated notification prevents the “missed” signal on an individual agent in a dashboard or reports from being overlooked. This automated monitoring mitigates the need to review dashboard and reports frequently as well as establishes a standardized “action value”. | If any of the following **data metrics** Utilization, Occupancy, or Labor Time per Call for an individual agent demonstrate statistically valid “special cause” patterns / thresholds an alert will be emailed to the supervisor. Notified party can use the Utilization and Occupancy dashboards or reports for additional details |  |

# Agent Efficiency Presentation Object Details

Mock-ups go here

Can be configured to any date range