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Improving Productivity: Call Center Agent Seating

Call Center Management:

Planning, Scheduling, Historical and Real Time Statistics

Introduction:

Since their inception in the 1960s and before, call centers have relied on telephone equipment to assign calls to agents on a rotational or other objective basis. With the invention of the digital Automatic Call Distributor (“ACD”) measurement of activity became an equally important responsibility of the telephone system. Today’s systems provide management with real time statistics, current statistics (cumulative for the hour or day), and even historical (year-to-date) statistics.

Goals are set, achieved, and measured in nearly all call centers. These goals usually relate to customer service or costs. Typical goals include the Average Delay Before Answer (a.k.a. ASA or average speed of answer), the percent answered within 20 seconds, or some other meaningful threshold.

Measurement, tracking and recording of performance are functions management performs in all call centers. Management is also responsible for forecasts and plans for the future; some, of course, do more than others in this area.

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Scope:

Management theory varies from “Top Down” to “Employee Empowerment”. Either approach, or the more frequent blend somewhere between the extremes, requires data to be collected, plus analysis of that data. The management cycle of “Plan, Control, Review, and Evaluate” allows repetitive feedback toward meeting the goals established and improving operations and goals for the next cycle. The scope of this white paper includes management information and its use for forecasting work volumes, planning and scheduling agents to handle the projected work volume, and feedback as to the actual performance of the call center and the agents.

Goals:

Typical goals include both customer service and agent productivity statistics. Call centers focus on meeting customers needs including a timely answer, helpful service, and perhaps taking an order. Let’s look at several typical goals:

Service Level: A timely answer is usually measured in one of two ways: the percent answered within X seconds, or the average speed of answer sometimes known as the average delay before answer. Either way we are measuring a timely answer. The traditional 80 percent answered within 20 seconds, “so-called industry standard” was developed years ago when engineers at Bell Labs had developed a counter which would “peg” each time a call waited for more than 20 seconds. All-digital switches have made this device obsolete, but the 20 seconds continues because it represents about three ring cycles, a very reasonable time for someone to wait for a ringing phone to be answered.

Calls Per Hour: Agents handle calls, more or less, one after the other with the ACD directing the next call that arrives to the agent who is “next up” and ready for the call. Agents often can control whether they are “ready” for the call through a key on their telephone instrument.

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Agents who are diligent can be “ready” when a call comes in and be productive throughout the day. While they cannot control the number of calls that arrive at the call center, they can influence the number of calls that they take. Likewise, agents who are not diligent can reduce the number of calls they handle. By setting goals for “Calls Handled Per Hour Worked” and measuring actual performance, management can distinguish the diligent from the non-diligent agents.

When taken in the aggregate the calls per hour worked provides a measure of cost control for the office as a total.

Favorable State Efficiency: If an office is overstaffed there may not be enough calls to go around; agents will not be able to handle enough calls to answer X calls per hour. Let’s say there are 10 agents and the goal is 9 call per hour. If only 80 calls arrive at the call center that hour, it is impossible for all 10 agents to achieve the goal of 9 calls per hour. Since agents can influence, but not totally control whether they make the Calls per Hour goal, some managers have designed another goal which is totally controllable by agents. Depending on the ACD, it is possible to track agent states and determine how an agent spends his time. Five typical states are “Inbound Calls” (handling a customer call), “Available” (waiting for the next call), “Post Call” (required work between calls), “Unavailable” (not ready for a call), or “Outbound” (making an outside call). Depending on the work content for a particular call center, these states can be divided between ‘Good’ and ‘Bad’. Available and Inbound Calls are always Good states. Unavailable is always Bad. Outbound and Post Call are Good or Bad depending on the work content at the call centers. Favorable state efficiency measures the percent of time spent in Good activities compared with the total day. It’s totally controllable by the agent. Overstaffing will tend to push up the Available state, but since it’s combined with Inbound Calls the agent gets favorable credit as long as they are talking with customers or ready to talk with customers. With motivation and prompt periodic feedback, the favorable efficiency can reach or exceed 90 percent in many call centers.

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Staffing and Scheduling: Last, but certainly not least, all the other goals depend on staffing decisions made strictly by management without assistance from individual agents. Staffing with too many people will probably allow the service level to rise above goal. Customers would certainly like 95 percent answered within 20 seconds. However, productivity, as measured by calls per hour, would drop. Agents would be spending too much time waiting for the next call. Too few people will allow the calls per hour figure to rise above goal, but customers will be subjected to long waits and the service level goal will not be met.

So, how do we determine the right number of agents if you're wrong with too many and wrong with too few? Call centers for years and years have relied on the mathematic modeling of a Russian scientist by the name of Erlang. His formula, Erlang "C", allows computation of the right number of agents given the volume of calls, the processing time per call, and the service level goal ... such as 80 percent answered within 20 seconds.

So it is left to management to forecast the volume of calls, the processing time per call and the goal of X percent in Y seconds. The ACD is a big help in capturing history on call volume and time per call. An off-board tool is needed for future predictions. Computer programs similar to the Agent Power[®] Planning and Scheduling Module capture history from the ACD, project future workload and with the assistance of the Erlang C formula, project the agents needed to handle the call load.

The goal? Oh yes, the goal is to have the correct staffing level to meet the stated service level goal every half hour of every day. That is accomplished in two steps. Number 1, accurately project the half hourly workload, and Number 2 set up agent schedules so the staffing is balanced with the workload... every half hour. While the goal is set for every half hour of every day, perfection is usually not achievable. By striving for proper staffing each half hour, call centers end the day with good customer service levels, productive agents, and happy customers.

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Tools:

Agent Power[®] Planning and Scheduling, Group Performance and Agent Performance from Desk Flex, Inc. provide a multitude of features directed to meeting service level and productivity goals for call centers with Nortel, Avaya, ROLM, Siemens and other ACD systems. These tools can be used independently or together.

Let's take the future first and then the past; we'll look at Planning and Scheduling and then Agent and Group Performance.

The goal of the Planning and Scheduling Module is to match staffing with planned workload. It's a straightforward three step process.

- 1) Capture the historical volume, and project the future volume of work.
- 2) Project the agents needed to complete the forecasted work while meeting the service level target.
- 3) Develop work schedules for agents that will balance the staffing with the projected workload.

Agent Power lets you follow this process in easy steps, allowing you to develop a schedule to match staffing with workload for future days, weeks, and even for the monthly budget.

An add-on to Planning and Scheduling, the Agent Adherence module tracks when agents actually reported to work, actually went on break, lunch or projects and contrasts their actual activity with the activity plan assigned in the scheduling module. The benefits of scientific scheduling are realized when agents follow their prescribed schedule. If everyone goes to lunch together and ignores the schedule it should be obvious that the coverage will be less than plan and service level will suffer.

The Performance modules (and the Real Time Data modules not described herein) provide data on how the call center operation has performed; some information is the "macro" or big-picture information and some is the "micro" or detailed information. Tracking the operation of the call center allows management to determine if the operations are

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on-target, or whether a course correction is appropriate. Taking a close look at agent activity ... calls answered, time spend talking with customers, time unavailable ... allows managers and supervisors to enlist help from the training department, where needed, and helps motivate agents to meet office goals. Time after time it has been demonstrated that improvement in a statistic follows directly from measurement and focus on the statistic.

Thus, Agent Power can help forecast calls and other transactions, forecast workload, schedule agents, track actual performance for ACD groups and follow details of agent activity and performance.

Case Study #1: - Planning and Scheduling

Dixie Sales: Greensboro, North Carolina

Wholesale distribution of parts and accessories for lawn and garden equipment Marketing in U.S. and Canada.

Case Study # 1:
Dixie Sales

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Mark Plott: Call Center Operations Analyst
Agent Power customer since 1999; nine years.

The call center handles calls from the entire U.S. plus overflow calls from their small call center in Canada. Current staffing is 40 permanent employees and up to 65 seasonal employee for the peak spring and summer seasons.

Mark told us,

In 1999-2000 we found our business and call volumes exceeding capacity of the 20 agents we had. We began to expand our hours past 8:00 to 5:00. We also began breaking our calls into three business segments or channels (Consumer, Mass Retailers, and Repair Centers). We recognized the need for a more technical or scientific approach to employee work schedules. Since 2000 we have expanded our hours to 8am to 9pm on weekdays and hours on both Saturday and Sunday.

Our goal for Agent Power was “to determine when and where we needed agents.” I was a bit doubtful at first, but it has done exactly that. Absolutely!.

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What else?

Agent Power has helped us reduce costs. Staff is now scheduled based on business need. We have tools for feedback to agents on attendance and performance... built into our evaluation structure. Also we use Agent Power for a long range budgeting tool. Helps us forecast what is likely to happen tomorrow, next week, and even next year.

Tell us about your experience with the Agent Power support desk ...

Far exceeds my expectation. Better than any other outside vendor we deal with here.

Do you have any other observations about Agent Power Planning and Scheduling based on your nine years using the application?

AP is a great resource for our growth from a small to a medium size call center over the last 8 years. A perfect fit for our size ranges. The other competing packages were cost prohibitive. We got virtually the same functionality compared with the larger and more costly systems.

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The bottom line for Dixie sales; successful growth from 20 to 105 agents in recent years, forecasting, planning and executing their plans toward increasing their business five-fold. Bravo, Dixie Sales.

Case Study #2: Agent and Group Performance

Kemper Auto and Home (Insurance)

Four locations: 5 to 25 agents per location
Claims processing and underwriting.

Nadine Carcaba: Senior Analyst

Nadine spoke with supervisors from two of the offices to gather thoughts for this interview.

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What was the business need for Agent Power

We needed to provide statistics to management and supervisors so they could better manager their operation; real time and historical statistic were both needed. We looked at other products including the nice, but pricey, offering from the switch manufacturer. Our goal was to better track results in both real time and after-the-fact.

How do you use Agent Power?

If calls begin appearing in the queue, we're able to see exactly how many reps are available and ready and determine if we need to check on those that aren't. We monitor individual agent's performance to identify any potential problems. We review the information with the agents twice a month so everyone knows where they stand.

Did you meet your goal for use of Agent Power?

Oh, yes. We are able to determine each agent's production levels and set office standards for productivity. The real time information gives us an instant picture of who's available.

Did you find other benefits?

We've improved service to our customers; calls are being answered more promptly due to better utilization and productivity of our staff.

What about the Agent Power Help Desk?

Help Desk has been great. You can call them, and they'll actually talk with you.

With Agent Power's historical reports and graphs KAH has been able to improve productivity by measuring agent productivity and setting standards. The agents have responded and productivity and customer service are both up. Way to GO, Kemper.

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Kemper Auto
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Case Study #3: Real Time Statistics Display

Eastman Kodak Company: Hollywood California
Motion Picture Film Distribution Facility

Bob Wagner, Customer Services Manager
Agent Power customer since 1997; eleven years.

The facility supplies film to the motion picture industry in Hollywood. Included at the facility is a call center which handles orders and customer service for local customers. The call center has declared a group goal and pride themselves on answering 92 percent of their phone calls within 20 seconds.

Agent Power's Real Time Display was installed in 1997 to display current statistics and provide real time feedback to agents, management and visitors. Three other "nice to know" statistics are displayed, but the Key Success Factor is "Percent answered within 20 seconds."

Bob tells us, **"Agent Power allows the Customer Service Reps to know what the service level is. Are we on track for the day, or not? Are we meeting the goal?"** The continuous feedback is a great tool for self-management by the CSRs.

With his eleven year perspective as a customer of Desk Flex, we asked Bob to comment on whether the service he has received has been acceptable. Per Bob, **"Yes, far better than acceptable. I'd say Great. Any need or want I've had in all that time has been addressed promptly. I can't say enough about the service."**

"With the PRM staff enthusiastically supporting my operation of Agent Power I have one less thing to worry about each day."

Great product, great people, a very aggressive customer service goal; how does it all add together? The bottom line, Bob and his team have met or exceeded their service level goal in every month for the last several years.

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Conclusion

Agent Power's track record since 1985 of helping Call Center Managers with their historical, current and planning information sets a solid foundation for application of scientific techniques to today's call centers. With features and enhancements every year the latest release, Version 23.5 is ready to assist call centers from 5 to 500 agents. Historical and real time statistics are gathered from today's popular ACD systems offered by the premier telecommunication manufacturers including Avaya, Nortel, Siemens, and Agent Power still provides full support for ROLM 9751.

The Planning and Scheduling Module, the premier module, has interfaces with the above manufactures and many others. Actually, in the last 21 years there has never been a need to rely on keying data; regardless of the ACD, Agent Power captures the data electronically. For call centers with 20 to 500 agents, Agent Power is cost/effective in forecasting and scheduling agents.

For more information, please call toll free 877-253 2356 or visit www.deskflex.com .

