

Potential Reporting Areas



An additional resource to
The Customer Response Management Handbook
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Measure Only What Matters!

It is imperative that you only measure what matters to the business drivers and only what your staff are in control of. Effective customer service and sales success indicators are those that are actually important to your caller (as well as your company). We can get into the habit of data overload and no time or way to use all the data other than as another doorstop-size report. We all can see how we would want to measure sales or sales leads and trends.

At the end of this paper, I've listed a number of areas you can measure and a possible frequency. What does happen with too many reports is that they become unmanageable and unhelpful at least and frustrating at best. You need to evaluate what is and what isn't helpful for your business, and the different levels of management and staff.

The great temptation is to over measure, simply because you can. At the end don't waste your time measuring things that aren't ultimately of importance to your customers.... And know that the strategy of what you measure will result in specific behaviours that may be difficult to monitor and understand for a while. All the research, when boiled down indicates there are five things that are important to customers:

1. Accurate information the first time
2. Faster Answer Times
3. Friendly Nice People
4. Follow-up Calls
5. Listening

Balanced Scorecard

One tool that can help ensure your measures don't overemphasise an area that has little affect on your overall financial and quality performance. The "Balanced Scorecard" is a tool designed to create a "matrix" of measures to balance a number of measures in a relational reporting model.

The following balanced scorecard offers you a matrix using five key measures against four people groups as an ultimate “contact centre balanced score card”. It measures

- Attendance
- Results of campaigns
- Teamwork & community involvement
- Extra efforts, participation & company suggestions

With regard to being responsible to four people groups

- Individual Staff member
- Clients (internal & external)
- Customers
- Management

It would look something like this:

Balanced Scorecard

Staff Members	Clients (internal & external)	Customers	Management
Attendance	Two-way quality of communication (w/no surprises!)	Accessibility -day -time -speed	Customer satisfaction to complaint balance
Results of campaigns	Meeting SLAs for clients, suppliers & “alliance partners”	Activity -volumes -types of calls	Employee satisfaction measures, loyalty & longevity
Teamwork & community involvement	Customer Satisfaction to Complaint balance	Results -outcomes -customer satisfaction surveys	Loyalty of clients, suppliers, “alliance partners” & investors
Extra Efforts, Participation & Company Suggestions	Results for investment	Productivity -“pers” -percentages	Client business growth -growth of campaigns -additional business -referrals
Customer Satisfaction to Complaint balance	Effectiveness, quality & timeliness of Results & Reports	Key measures -cost/call -average cost/customer	Profit & loss -breakeven timeliness -cost containment & suggestions from employees, clients & customers

Other potential areas to measure and possible frequency of those measures.

General

Measure	Real-time	Daily	Weekly	Monthly
Sales, productivity and financial				
Inbound calls by operator and by team	✓	✓	✓	✓
Abandoned rate	✓	✓	✓	✓
Inbound call duration	✓	✓	✓	✓
Talk time % logged time	✓	✓	✓	✓
Wrap time % logged time	✓	✓	✓	✓
Busy time % logged time	✓	✓	✓	✓
Information requests % calls		✓	✓	✓
Quotations as % calls		✓	✓	✓
Applications as % calls		✓	✓	✓
Complaints as % calls		✓	✓	✓
Hoax/abuse as % calls		✓	✓	✓
Sales by reps and by team		✓	✓	✓
Conversion rate by reps and team		✓	✓	✓
Volume versus target		✓	✓	✓
Cost per call				✓
Cost per sale				✓
% calls escalated		✓	✓	✓
Inbound line utilisation			✓	✓
Reasons for non-sale – by type		✓	✓	✓
'Result' of call – by type		✓	✓	✓
Outbound dials by reps and team	✓	✓	✓	✓
Outbound contacts against target		✓	✓	✓
Outbound sales duration		✓	✓	✓
Outbound call volume	✓	✓	✓	✓
Outbound conversion rate		✓	✓	✓
'Result' of call – by type		✓	✓	✓
Financial Measures				
Hours worked against budget			✓	✓
Headcount against budget				✓
Revenue per rep				✓
Marketing				
Response by media		✓	✓	✓
Conversion by media			✓	✓
Cost per call by media				✓
Cost per policy by media				✓

Measure	Real-time	Daily	Weekly	Monthly
Cross-sell as % sales			✓	✓
Sales to existing customers		✓	✓	✓
Sales to referred customers		✓	✓	✓
Inquirers on database			✓	✓
Inquirers who have bought a product			✓	✓
Products per customer				✓
Lapse rate				✓
NTU rate				✓

Detailed

Measure (% and no.)	Real-time	Daily	Weekly	Monthly
Contacts by type (new, existing, by campaign)				
Mail		✓	✓	✓
Facsimile		✓	✓	✓
Modem		✓	✓	✓
Voice	✓	✓	✓	✓
Calls by type (by product, campaign)				
Information		✓	✓	✓
Quotation		✓	✓	✓
Application		✓	✓	✓
Complaint		✓	✓	✓
Hoax			✓	✓
Wrong number			✓	✓
Inquiry		✓	✓	✓
Change		✓	✓	✓
Claim				✓
Removal from mailing list			✓	✓
Quotation/application (by product)				
Accepted without further evidence				✓
Accepted after further evidence				✓
Not accepted				✓
Accepted following premium 'override'				✓

Measure (% and no.)	Real-time	Daily	Weekly	Monthly
Preferred payment method (by product)			✓	✓
Cheque				✓
Credit card				✓
Debit card				✓
Salary deduction				✓
Direct debit				✓
Monthly				✓
Quarterly				✓
Half-yearly				✓
Annually				✓
Method/term not acceptable by type				✓
Changes (by product)				
Number by type				✓
Requiring mid-term adjustments				✓
Min., Max., Avg increase in premium				✓
Requiring termination of policy				✓
Delaying payments from customer				✓
Delaying payments to customer				✓
Affecting other areas				✓
Processed over telephone in 'one hit'				✓
Requiring back-office processing				✓
Method (% and no.)	Real-time	Daily	Weekly	Monthly
Inquiries				
Number – by type		✓	✓	✓
Process over the phone in 'one hit'			✓	✓
Requiring back-office processing			✓	✓
Outbound calls				
Number – by type	✓	✓	✓	✓
Connected			✓	✓
Connection failed			✓	✓
Answering machine			✓	✓
Wrong number			✓	✓
Inbound mailings (by product, campaign)				
Number – by type		✓	✓	✓

Measure (% and no.)	Real-time	Daily	Weekly	Monthly
Fulfilment (by product, campaign)				
Number mailings – by type		✓	✓	✓
Brochures, attachments – by type			✓	✓
Busy line and office closed				
Number – by campaign		✓	✓	✓
Message left			✓	✓
IVR selected			✓	✓
Hung up			✓	✓
Min., Max., and Average wait time				✓
Routed to back office	✓	✓	✓	✓
Call monitoring				
New business calls recorded by type			✓	✓
Existing business calls recorded by type			✓	✓
Calls assessed by type			✓	✓
Deficiencies revealed			✓	✓
Outbound contact required			✓	✓
Reps found to be deficient			✓	✓
Reps to have activity limited			✓	✓
Referrals				
Referrals to other distribution channels			✓	✓
Referrals to field sales, branches, etc			✓	✓
Referrals refused				✓
Call handling (new and existing)				
Calls handled by reps		✓	✓	✓
Min., Max., Average wait time			✓	✓
Calls needing transferring		✓	✓	✓
– within the centre		✓	✓	✓
– Transferred to another areal		✓	✓	✓
Calls needing escalating		✓	✓	✓
Miscellaneous (by product)				
Unaware of existing relationship				✓
Could not handle request by type				✓
Geographic spread			✓	✓
Advice requests			✓	✓

Measure (% and no.)	Real-time	Daily	Weekly	Monthly
Service standards (by type of mail) (max., avg, no. exceeding standards)		✓	✓	✓
Time to process mail		✓	✓	✓
Time to underwrite			✓	✓
Time to process claim		✓	✓	✓
Calls per customer (by product)				
Customers dialling once per year				✓
Customers not dialled per year				✓
Average calls per customer per year				✓
Marketing				
Customers on the database – by type			✓	✓
Analysis of database – by age, sex, etc.			✓	✓
Customer satisfaction questionnaires				
Customers questioned			✓	✓
Responses			✓	✓