



# **-SAMPLE REPORT-**

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## **CALL CENTER OPTIMIZATION ASSESSMENT**

In order to maintain client-confidentiality, the name of the organization involved in this call center optimization assessment has been replaced with “#####” or “REDACTED.”

- **Background & Approach**
- Executive Summary
- Observations & Recommendations
- Supporting Documents

## Background

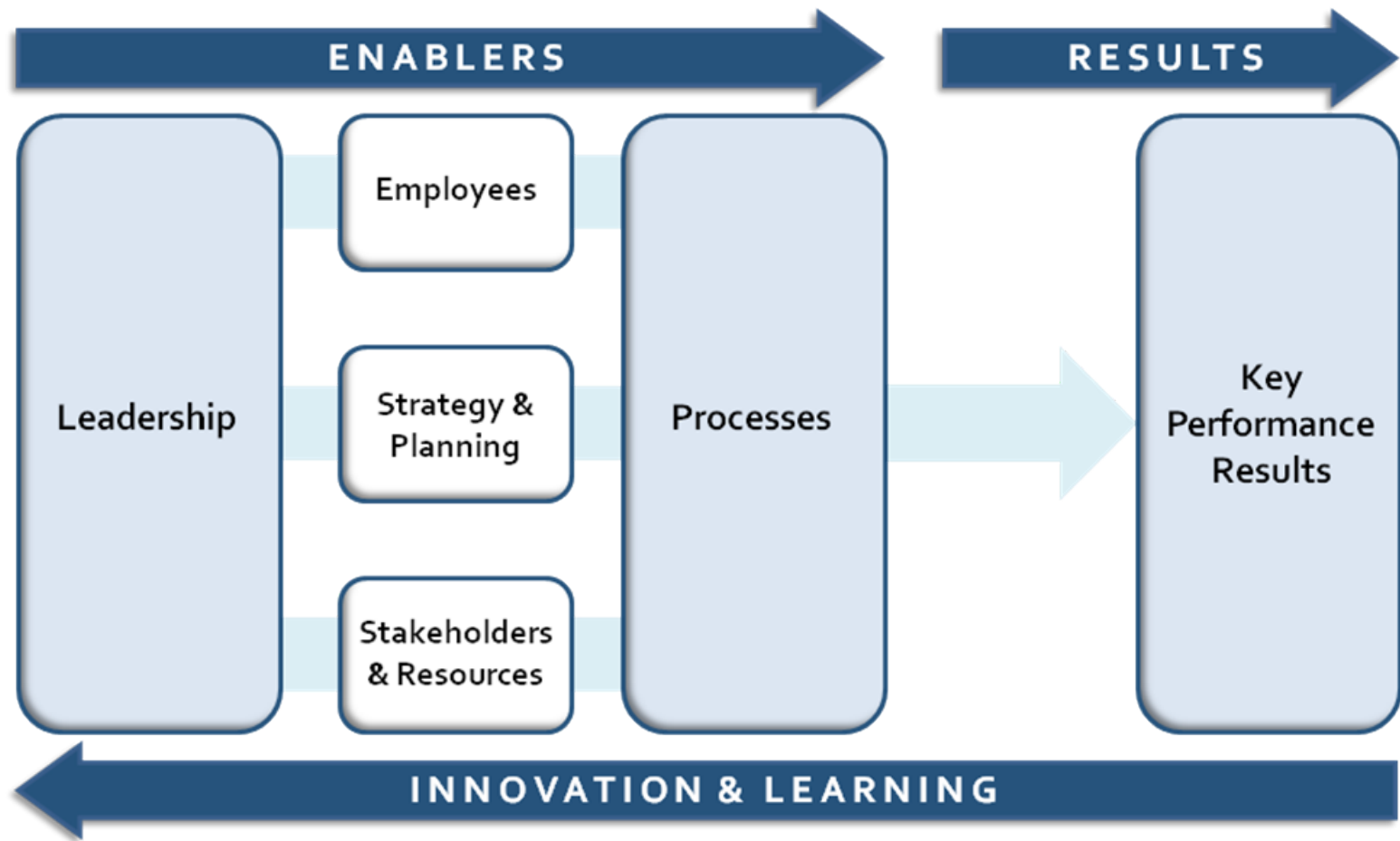
- The call center currently has 8.7 FTEs and one Manager.
- ##### currently receives more than 13,000 incoming calls each month and makes 6,200 outbound calls, emails, faxes and discharge orders.
- 11% growth year over year since 2011
- ##### has struggled to meet service level objectives since late 2011 and experienced higher than expected turnover throughout the same time frame.
- ICMI stepped in to conduct a Best Practices Assessment – a gap analysis between current state and best practice, providing actionable recommendations and an action plan to close identified gaps.

## Approach

- Interview key personnel
- Gather and review of key processes, data and systems
- Identify key performance indicators
- Conduct gap analysis
- Provide best in class recommendations



## ICMI Global Standards and Assessment Categories



- Background & Approach
- **Executive Summary**
- Observations & Recommendations
- Supporting Documents

ICMI finds that the current ##### contact center model requires enhancements primarily in the following categories: **Strategy and Planning, Employee Management, Processes & Procedures & Key Performance Results**

## Strategy and Planning

- A customer-focused mission, vision, goals and objectives should be identified and communicated throughout the organization.
- Create a multi-channel customer access strategy to serve as a high level plan to help guide the ##### direction and decisions in order to ensure patient expectations are met.



## Employee Management

- Formalize a recruiting and hiring plan that includes an ideal candidate profile, basic typing tests, job previews and script reading
- Develop training plans that address both new hire and ongoing requirements for ### staff and integrate with future quality and patient satisfaction programs.
- Deliver targeted training around key functions – Contact Center Fundamentals, WFM, quality, coaching, and others based on their role.
- Establish group and individual performance criteria that aligns with the objectives of the overall business and ensure they are part of each employee's performance appraisal.
- Implement performance-based compensation and rewards and recognition programs to help improve retention, performance, and satisfaction.
- Analyze employee feedback received in employee surveys, share results with staff and develop actions plans to mitigate potential employee dissatisfiers and attrition drivers.

## Processes and Procedures

- Adopt the necessary workforce management processes to ensure optimal planning, forecasting, staffing, scheduling and service level management.
- Correctly staff the PSC to meet current and future workload demands.
- Design and implement a quality monitoring program that will ensure consistent, quality interactions with patients across all channels.
- Design ###-specific patient satisfaction surveys and measurement tools to provide insight into the patient experience. This will correlate with quality results and continuous improvement processes and allow for the capture of Voice of the Customer (VOC) data and analysis.
- Adjust/streamline current reports and automate where possible, using pivot tables and graphs to simplify the planning, analysis and reporting process.
- Revamp auto attendant menus and options to improve the patient experience.
- Eliminate voicemail options to improve efficiencies and the patient experience.
- Explore automating more outbound calls to reduce operating costs

## Key Performance Results

- Identify appropriate service level and response time objectives by contact type, including incoming/outgoing calls, emails, faxes and discharge orders.
- Once quality, patient satisfaction, and WFM processes are established, identify and communicate goals for each program including quality, patient satisfaction, schedule adherence and forecast accuracy.

- Background & Approach
- Executive Summary
- **Observations & Recommendations**
- Supporting Documents
- Questions/Next Steps

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## STRATEGY & PLANNING

Purpose, Strategy & Goals & Objectives

START TIME

Q3

TIMELINE

60 days - Ongoing

Priority

High

### Observation(s)

#### 1. Strategic Planning

- a. Schedulers handle back-to-back calls all day long and juggle other work in between.

- 2. **Purpose Statement** - ### does not have a purpose statement that aligns to the companies mission, vision & values.

- 3. **Customer Access Strategy** -Is not fully communicated or published to front-line staff.

#### 4. Center Goals & Objectives

- a. Minimum measurable goals/objectives.
- b. Reports do not include goals - difficult to determine performance gaps.
- c. Some calls are evaluated but not scored for quality.
- d. CSAT is not measured.

### Recommendation(s)

#### 1. Strategic Planning

- a. Incorporate resource planning into strategic planning to ensure ### is correctly staffed.

#### 2. Purpose Statement

- a. Establish a re-aligned purpose statement.
- b. Review and promote the purpose statement on a regular basis.
- c. Ensure all staff can articulate their contribution to company success.

#### 3. Customer Contact Strategy

Assemble & Communicate the strategy and manage closely going forward.

#### 4. Center Goals & Objectives

Validate service level and response times goals and establish CSAT & Quality goals.

### Benefits(s)

#### 1. Strategic Planning

- a. Increases FCR, PSAT and employee morale.

#### 2. Purpose Statement

- a. Adds role clarity, leading to higher engagement and improved patient experience.
- b. Helps define/align strategies, focuses discussions, aids decision-making and drives desired behaviors.

#### 3. Customer Contact Strategy

- a. Defines overall role of the contact center.
- b. Aligns with corporate strategies to increase revenue and reduce operating costs.

#### 4. Center Goals & Objectives

- a. Sets benchmark to track performance over time.
- b. Fosters intelligent decision-making.

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## EMPLOYEE MANAGEMENT

### Recruiting and Hiring

## START TIME

Before Next Hire

## TIMELINE

30-60 Days

## Priority

Med.

### Observation(s)

#### 1. Job Description

- a. Does not specify keyboarding skills as a requirement.
- b. Manager description does not require contact center management experience.

#### 2. Recruiting/Hiring Plan

- a. Effective components of a multi-phase hiring plan are in place *informally*.
- b. A formal ### Scheduler ideal candidate profile has not been developed
- c. Insufficient tools in place to make staffing decisions based on by SL performance, non-phone work and attrition.
- d. No minimum time-in-position requirement exists.

### Recommendation(s)

#### 1. Job Description

- a. Add computer skills, including keyboarding, and the ability to talk and type simultaneously to the scheduler JD.
- b. Add contact center management experience to Manager JD.
- c. Reference JD during recruiting, hiring, training, performance appraisals and career development.

#### 2. Recruiting/Hiring Plan

- a. Hire based on projections from staffing model.
- b. Develop successful hire profile to serve as a benchmark.
- c. Incorporate basic typing test in first phase of interview.
- d. Formalize job preview process and script reading.
- e. Require a minimum of one year in PSC before employees can post out.

### Benefits(s)

#### 1. Job Description

- a. Improves employee satisfaction and retention by providing blueprint for success.
- b. Helps recruiting/hiring by more effectively screening out unqualified candidates.

#### 2. Recruiting/Hiring Plan

- a. Selecting the proper candidates improves service delivery, CSAT, and reduces attrition.
- b. Tracking, trending, and analyzing data for correlation between pre-employment screen results and successful schedules can provide deeper insight to better hiring and retention.

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## EMPLOYEE MANAGEMENT

### Training and Development

## START TIME

Before Next Class

## TIMELINE

60 Days - Ongoing

## Priority

Med.

### Observation(s)

- a. No formal training plan.
- b. Limited classroom training (mostly due to size of center and average training class).
- c. New-hire training does not include basic customer service training or contact center fundamentals.
- d. No formal, ongoing career development training.
- e. Refresher training handled as needed based on needs identified by manager.
- f. There is a training manual that mainly consists of a variety of cheat sheets needed to aid in various contact types.
- g. Managers demonstrate the ability to run a contact center but would benefit from formal contact center management and MS Excel training.

### Recommendation(s)

- a. Create a formal training plan that includes both new-hire and ongoing training requirements for customer service skills, contact center basics, technical skills and product/practice knowledge among ##### staff.
- b. Analyze skills, knowledge, competencies, and systems, which provides the basis for curriculum design and design a more formal student training manual and instructor manual that outline topics, learning objectives, pre-requisites, delivery method, assessments, etc.
- c. Integrate with QA & PSAT programs (not yet in place).
- d. Provide manager with formal contact center management training and Microsoft Excel training.

### Benefits(s)

- a. Both new hire and ongoing training is vital to performing effectively and efficiently.
- b. Improper T&D leads to poor quality, low productivity, customer and employee dissatisfaction, and attrition.

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EMPLOYEE MANAGEMENT  
Performance Management

START TIME  
Q4

TIMELINE  
60 Days - Ongoing

Priority  
High

## Observation(s)

### 1. Performance Management

There is no formal performance management program in place.

### 2. Individual Goals and Objectives

Goals and objectives are not clearly

## Recommendation(s)

### 1. Performance Management

Implement a formal program.

### 2. Individual Goals and Objectives

a. Establish clear criteria that link to strategic objectives.

## Benefits(s)

a. Improves quality, knowledge, retention, FCR, and customer satisfaction.

b. Reduces recruiting & training time and costs.

c. Performance Management and

Limited Version Ends Here.

Request a walk-through of the full report

