CONTACT CENTER MANAGEMENT BOOT CAMP

Official Curriculum | Workbook Sample

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How to use this workbook: The content of the workbook follows the content the instructor presents in the full course. Specific lesions have been chosen from the full workbook to provide you with a better understanding of the course content and activities. There is room for additional notes and designated areas for exercises.

Once you are ready to explore the full course, **visit the official course web page** to explore available course delivery methods, or **contact our training team** to learn more or ask a question.

Warm Regards,

The ICMI Team

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THE CONTACT CENTER PLANNING AND MANAGEMENT PROCESS

The Contact Center
Planning and Management Process

3 Driving Forces • 9-Step Planning and Management Process

Exercise: Single Agent Queue

Instructions: Each line below represents a single call entering the queue and with only one agent working. Fill in the blanks on the table. Then complete the queue calculations and the reflection questions.

Arrival Order	Time Arrived (min)	Handle Time	Time Call Began (min)	Time Call Completed (min)	Delay Time
1	2.2	3.0	2.2	5.2	0.0
2	4.3	2.4	5.2	7.6	0.9
3	6.6	3.2	7.6	10.8	1.0
4	7.2	2.0	10.8	12.8	3.6
5	13.2	1.2	13.2	14.4	0.0
6	15.7	2.6	15.7	18.3	0.0
7	17.3	3.5	18.3	21.8	1.0
8	21.1	2.2			
9	22.1	3.9			
10	25.4	2.0			

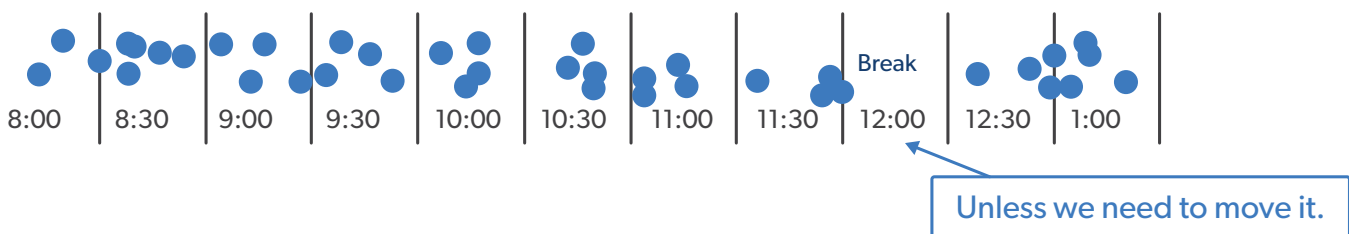| Metric	Calculation	Answer
Total Handle Time	Sum of all handle times	
Average Handle Time	Total handle time ÷ total number of calls	
Agent Occupancy %	Total handle time ÷ total minutes in interval	
Service Level	# of calls with 30 secs or less of delay time ÷ total number of calls	
Total Delay	Sum of all delay times	
Average Delay	Total delay ÷ total number of calls	
Average Delay of Delayed Calls	Total delay ÷ number of calls delayed more than 0 seconds	
Probability of Delay %	# of calls delayed longer than 0 seconds ÷ total number of calls	

Reflection

1. In your own words, describe how busy the agent was.

2. In this example, as the service level goes down, the agent's occupancy goes up. Explain why.

3. In your own words, describe the average customer experience.

Some Work Must Be Handled When It Arrives

- In the contact center, work arrives randomly.

- In the event of a backlog (queue), some of the "work" waits and some abandons the queue.

- We can assume that some abandoned work results in dissatisfied customers.
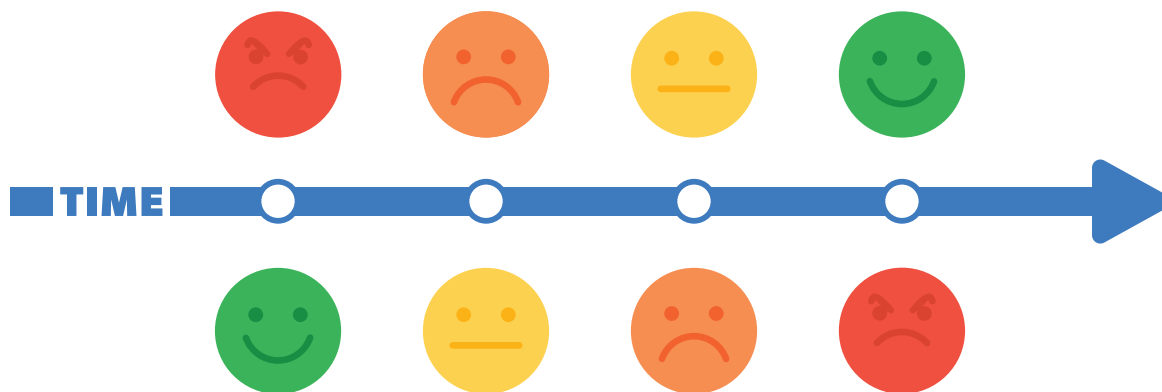
- Employee pace and productivity are variable.

Break

| 8:00 | 8:30 | 9:00 | 9:30 | 10:00 | 10:30 | 11:00 | 11:30 | 12:00 | 12:30 | 1:00 |

Unless we need to move it.

2. Visible or Invisible Queue

Does Making the Queue Visible Improve Customer Satisfaction?

Visible Queue
Customer knows how he/she is progressing.

TIME ➡

Invisible Queue
Customer doesn't know how long she/he will have to wait.

3. Customer Tolerance Factors

How Long Are Customers Willing to Wait?

- Degree of motivation
- Availability of substitutes
- Competition's service level
- Level of expectations
- Time available
- Who's paying for the contact
- Human behavior

Exercise: Customer Tolerance Factorse

Instructions: Look at the list of factors that impact customer tolerance and determine whether each factor influences your customers' willingness to wait without abandoning or becoming dissatisfied. Your choices are:

- DOES impact how long your customers will wait before abandoning or becoming dissatisfied with the wait.

- DOES NOT apply to your customers' willingness to wait before abandoning or becoming dissatisfied.

Factor	Example	Impact
Degree of motivation	My tax return is due tonight and I have a question that can only be answered by the IRS.	☐ DOES ☐ DOES NOT
Availability of substitutes	I have a question about my bank account.	☐ DOES ☐ DOES NOT
Competition's service level	When I call 1-800-Flowers, I compare the wait with ProFlowers.	☐ DOES ☐ DOES NOT
Level of expectations	I'm a platinum customer! Your ads say I can talk to a human at any time.	☐ DOES ☐ DOES NOT
Time available	I'm standing by the side of the road, trying to arrange a tow so I can get to work.	☐ DOES ☐ DOES NOT
Human behavior	My kids are on my last nerve today.	☐ DOES ☐ DOES NOT

Reflection

1. In your own words, describe your typical customers' willingness to wait without abandoning and without becoming dissatisfied.

2. Has understanding your customers' tolerance impacted how your contact center delivers service? Examples: We offer self-service or web-based service option; it impacts our IVR design; we implemented a visible queue; we offer callbacks.

   Or has it impacted your contact center objectives? For example, "Our customers will abandon and not try again, so our service level target is aggressive."

3. Are the factors of customer tolerance different across your contact channels? For example, email, chat, text.

ICMI's Planning and Management Process

THE PLANNING AND MANAGEMENT PROCESS

1. Choose Service Level & Response Time Objectives
2. Collect Data
3. Forecast Workload
4. Calculate Base Staff
5. Calculate System Resources
6. Calculate Shrinkage
7. Organize Schedules
8. Calculate Costs
9. Repeat for Higher & Lower Levels of Service

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Module 2: The Contact Center Planning and Management Process

Ideas from This Module

Actions to Take

Contact Center Management
Boot Camp

View Course Details

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