

Accelerating Contact Center QA and Performance Optimization with Screen Analytics

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Executive Summary

Contact center quality assurance applications are being enhanced with the addition of analytics. Analytical capabilities are making quality assurance solutions more actionable. This means that they are giving managers information that can be acted upon immediately to improve agent performance and the customer experience. During the past 20-plus years, contact center managers have become experts at using quality assurance solutions to measure and monitor agent performance, but have not been as effective at identifying enterprise-wide trends. Screen analytics is a new analytical application that helps contact center and enterprise management see the “big picture.” Screen analytics identifies, quantifies and categorizes the types of customer interactions agents are seeing and notes the systems and processes that they are using to address them. This data helps managers determine where to focus their limited resources to improve efficiency and the customer experience. Screen analytics helps contact center managers rapidly understand what is on customers’ minds by categorizing calls; find and fix broken systems and processes; and identify agent training needs.

2010 Top Contact Center Goals

2010 is expected to be another tough year for enterprises, even as the economy begins to recover slowly. Contact center managers will again be asked to reduce their operating expenses while improving the customer experience and satisfaction scores. They will also be told to place greater emphasis on retaining customers and identifying those at risk, without the aid of any additional resources.

To deliver on these key enterprise goals, contact center managers need to increase the use of self-service solutions and improve agent productivity without making major technology investments. This means that they have to figure out how to get more out of their existing solutions and applications. Quality assurance (QA) and workforce management – solutions that most contact centers already have – can play an important role in helping managers meet their corporate objectives. But to realize additional benefits, managers must change the way they operate and use these applications.

Quality assurance applications are generally used to measure how well agents adhere to internal policies and procedures. When analytics are embedded into QA solutions, their uses and benefits can be expanded in multiple ways. If the

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QA mission is extended to include the identification and categorization of customer interactions across channels (calls, emails and chat sessions), analytically-oriented QA solutions can be instrumental in improving processes in the contact center and other enterprise operating areas; QA can also help provide better agent forecasting while enhancing the customer and agent experience. Vendors have made similar claims and promises for years. Many of us have already realized a significant reduction in our contact center average handle time by using QA to increase agent productivity. But we can do more with our QA solutions and extend their benefits by enhancing them with analytics.

Analytics is being injected into many contact center applications and processes to make them more actionable. With regard to QA, this means issuing alerts and creating dashboards that notify management either in real time or near-real time about any problems and their potential impact. The sooner management knows about an issue, the quicker they can get it fixed. This speeds up resolution for customers already affected, and enables management to prevent the problem from impacting many others.

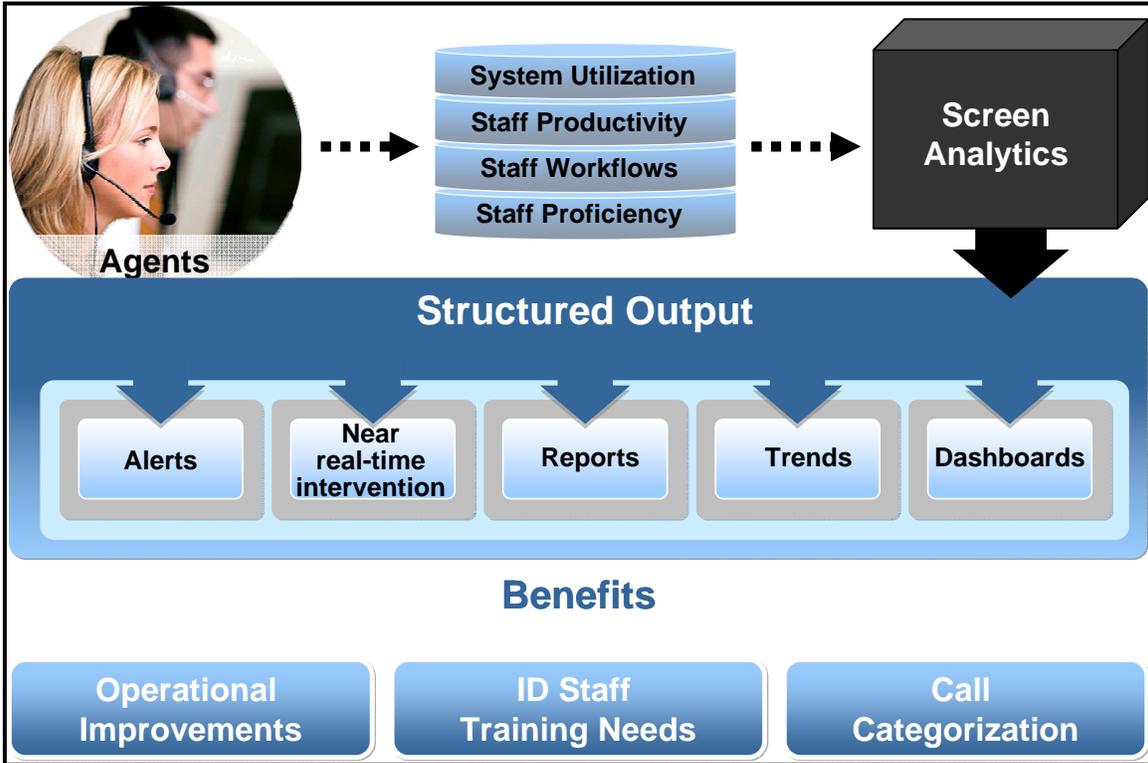
Screen analytics is a relatively new, practical and tactical solution that cost-effectively gives contact center and operating managers near-real-time information about customer issues. It also improves the QA process by categorizing issues so that the right ones can be prioritized – whether retaining high-value customers, fixing needlessly complex processes or addressing poor agent performance.

What is Screen Analytics?

Screen analytics is a component of desktop analytics. Desktop analytics captures, tracks and analyzes everything that happens on agents' desktops – which is where agents do the majority of their work for customers. Screen analytics concentrates on desktop applications accessed by the agent during and after the agent-customer interaction. It tracks, measures and evaluates the screens, applications, fields, data entered and events triggered by agents in their desktop servicing systems. It evaluates how well agents are performing their various system tasks, provides insights into the reasons customers call, identifies operational opportunities and delivers targeted reports and alerts. Screen analytics classifies calls and identifies agent training needs. It can also send near-real-time (with a few-second delay) alerts to supervisors or managers when agents access certain screens, such as when they go to close an account for a high-value customer. See Figure 1.

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Figure 1: Screen Analytics



Source: DMG Consulting LLC, November 2009

Here's how it works: Users predefine the screens and tag the application fields that they want to track and measure. For example, managers commonly want to see how well their agents handle up-sells, refunds, claims, disputes, cancellations or high-value customers. Data from the tagged fields is collected and attached to recorded calls or screens (when screen analytics is used for back-office functions). Users can capture data and events from as many fields as they want with each call, but keep in mind that they need to be able to rapidly review and respond to the results. The tagged data is referred to as call metadata, which can be automatically analyzed to identify call categories and to provide alerts. Implementations typically take two to four weeks.

Once calls are separated into categories, they can be reviewed by a supervisor or QA specialist to determine how well agents handled various interactions. Screen analytics should come with standard reports for call categorization, identifying trends, and enabling managers to compare the performance of their agents by category over time.

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Screen analytics is synergistic with traditional QA processes and systems. It adds an analytical dimension and changes QA from a random review to a targeted assessment of predefined interactions. Screen analytics allows managers to prioritize interactions for review based on their business value and impact on customers, the enterprise and agents.

Top Uses for Screen Analytics

The top five uses of screen analytics are: call categorization, process optimization, increasing first call resolution, identifying coaching and training needs, and reducing operating expenses. See Figure 2.

Screen analytics solutions provide near-real-time information via alerts and dashboards to supervisors and agents, as well as historical and trending information in dashboards and reports. Ideally, the solution should be able to critique and categorize a call within a few seconds of its completion so that alerts can be sent to front-line managers who can intervene and take corrective action, if necessary, in near-real time. Screen analytics also provides insights into operational trends, quantifies the cost of service, and allows agents to see how they are performing relative to their peers.

Figure 2: Screen Analytics Uses



Source: DMG Consulting LLC, November 2009

Why Your Contact Center Should Use Screen Analytics

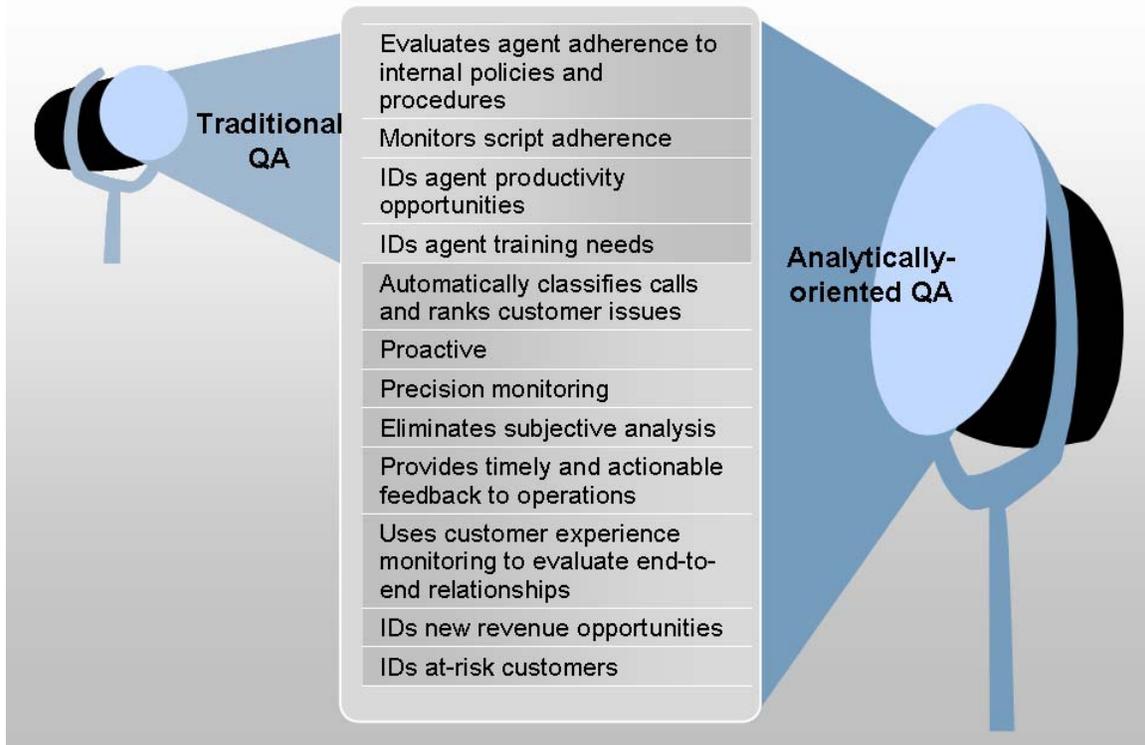
QA solutions improve call quality and productivity by identifying the impediments that prevent agents from delivering an outstanding customer experience. The issues may be training-related, operational, procedural or systems-oriented, but most, if not all, can be resolved once they are identified. However, since traditional QA is based on a random sampling of a small percentage of calls received by the department, important trends and improvement opportunities are often missed. In the past, contact center managers had little to no visibility into the performance of their desktop servicing solutions. They could see how each agent used their systems to address each call, but could not identify trends for the entire department, which is now possible with screen analytics.

Enterprise and contact center managers who want to rapidly and cost effectively identify insights about customer needs and agent performance issues should seriously consider screen analytics. Desktop and screen analytics solutions can also greatly enhance the business accuracy of speech analytics applications by providing contextual information.

Screen analytics offers significant benefits for customers, the contact center and the enterprise. For customers, screen analytics helps improve the customer experience, increase FCR, and reduce transfers, holds and call backs. For the contact center, screen analytics improves agent productivity, decreases the cost of service, identifies agent training needs, and improves agent satisfaction. The benefits of screen analytics extend beyond the contact center to the greater enterprise, as well. These solutions can play a role in increasing revenue and profitability, reduce risk by rapidly identifying inappropriate agent behaviors and performance, highlight broken business processes, identify “at-risk” customers while there is still an opportunity to retain them, and help build the brand by improving the customer experience. Sure, screen analytics solutions are tactical, but they rapidly deliver quantifiable benefits that are of great value to customers, agents and management.

Additionally, screen analytics adds a new dimension to the QA process. These solutions help transition QA from a departmental activity to a function that provides broader benefits, including identification of at-risk customers and new revenue opportunities, as seen in Figure 3.

Figure 3: Analytically-Oriented QA



Source: DMG Consulting LLC, November 2009

Conclusion

Screen analytics is a relatively inexpensive and easy-to-implement solution that can dramatically improve the effectiveness of the QA process by helping identify the calls or back-office transactions that will most benefit from management attention. Near-real-time screen analytics solutions empower managers to intervene on a timely basis. Most organizations have been using the same methods to do QA for the past five to ten years. Screen analytics adds a new dimension; it extends the benefits of the mission-critical QA process while providing timely insights that can be of use to the entire organization.

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About VPI

VPI (Voice Print International, Inc.) is the premier global provider of integrated interaction recording, analytics, quality management and workforce optimization solutions for enterprises, contact centers, trading floors, government agencies, and first responders. For more than a decade, VPI has been providing proven technology and superior service to more than 1,200 customers in 50 countries throughout the world. VPI's award-winning VPI EMPOWER software is an essential component for any organization that strives to enhance the customer experience, increase workforce performance, improve business efficiency, manage compliance and minimize risk. With VPI EMPOWER, organizations of all sizes now have the ability to rapidly uncover critical trends, issues and opportunities via powerful interaction analytics, interactive reports and automated call quality evaluation tools from anywhere – all from a personalized Web-based portal interface. In addition, the ultra-secure solution leverages advanced file and data encryption, is built around the principles of open architecture, and is platform independent to integrate seamlessly into any existing and evolving infrastructure, resulting in compound reduction of costs and a significant and rapid Return on Investment. For more information, call 1-800-200-5430 or visit <http://www.VPI-corp.com>.

About the Author

Donna Fluss is the founder and president of DMG Consulting LLC, the leading provider of call center and analytics research, market analysis and consulting. She is the author of *The Real-Time Contact Center*, *the Contact Center Executive and Management Briefing*, *the Contact Center QA Guide*, and many other leading industry reports on contact center analytics, quality assurance/recording, performance management, speech analytics, surveying, workforce management, Interactive Voice Response, and hosting. Contact Donna at donna.fluss@dmgconsult.com.