- Learn the principles that drive contact center behavior.

- Discover how the right technologies and processes powerfully boost performance.

- Bridge the gap between the contact center and IT and speak the same language.

- Boost your career by becoming a "go-to" source of insight in contact center optimization.

Topics

- Harnessing Technology to Boost Contact Center Value

- The Driving Forces Behind Contact Centers

- Optimizing Contact Center Planning and Management

- Unlocking Immutable Laws for Enhanced Performance

- Service Level and Quality—They Work Together

- Shaping an Effective Customer Access Strategy

- The Nexus of Humans and Technology

1. Harnessing Technology to Boost Contact Center Value

10% - 15%

Contact centers that consistently produce strategic value.

Source: International Customer Management Institute (ICMI)

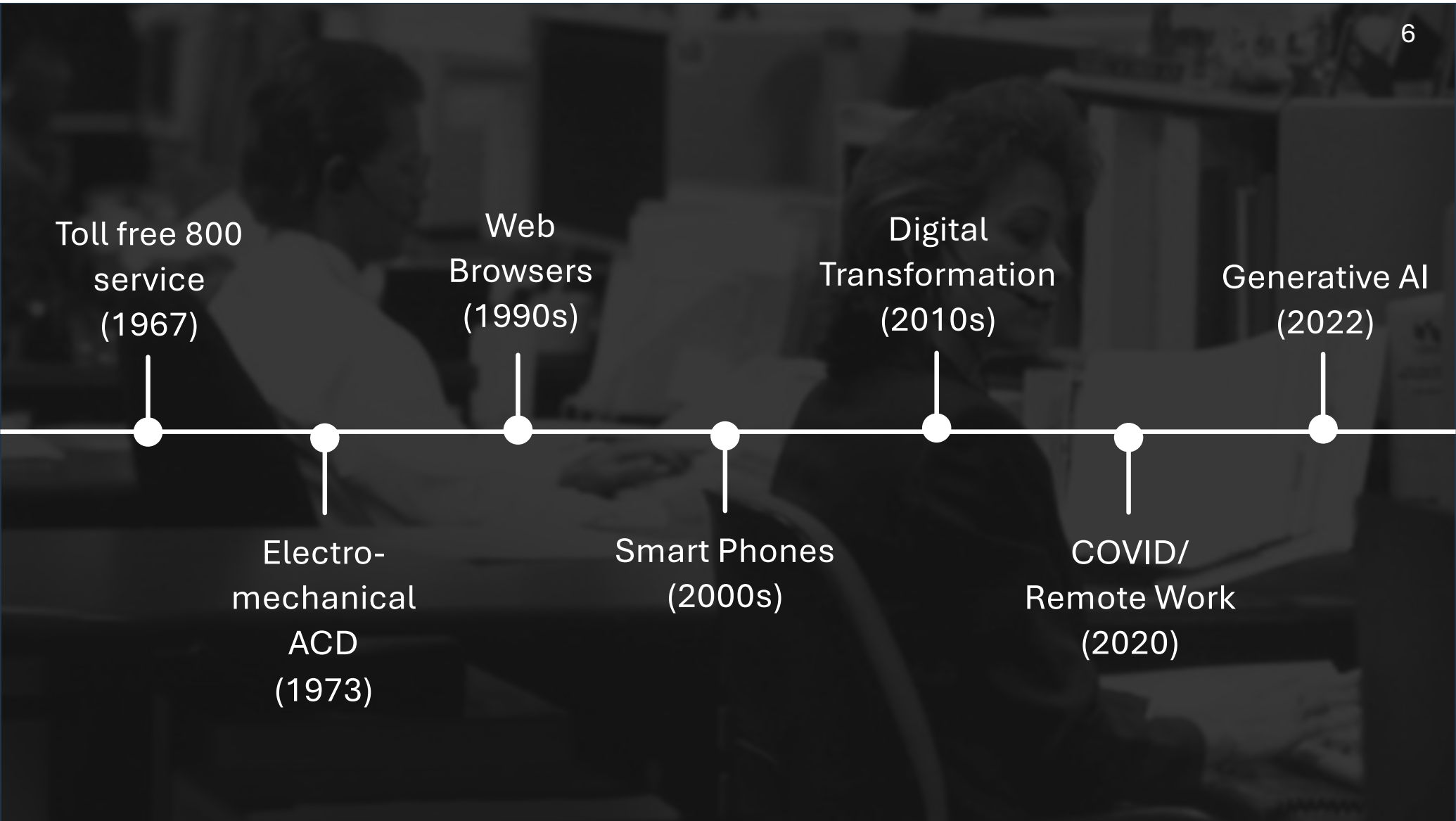Toll free 800 service (1967)
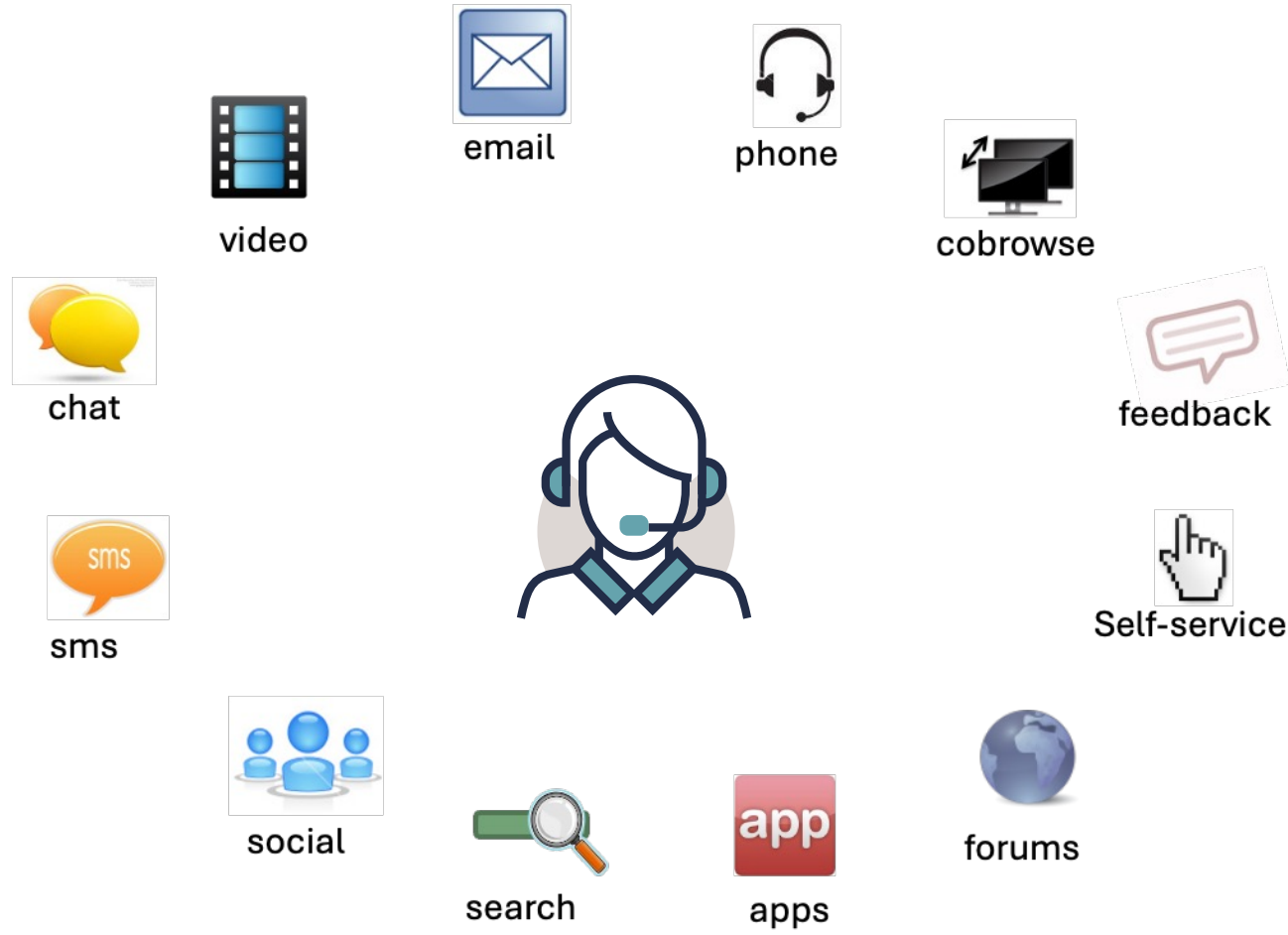
Electro-mechanical ACD (1973)

Web Browsers (1990s)

Smart Phones (2000s)

Digital Transformation (2010s)

COVID/ Remote Work (2020)

Generative AI (2022)

Understanding Workload

| | Average Talk Time* | **180** | | | Average After Contact Work Time* | **30** |
| | Contacts Per Half Hour | **250** | | | Service Level Objective* | **20** |

Agents	SL % Agents	Average Speed of Answer (ASA)*	Service Level (SL)	Number of customers waiting longer than x seconds — Agent Occupancy (OCC)	Trunkload (TKLD)
	30	209	24%	97%	54.0
	31	75	45%	94%	35.4
	32	38	61%	91%	30.3
	33	21	73%	88%	27.9
	34	13	82%	86%	26.8
	35	8	88%	83%	26.1
	36	5	92%	81%	25.7
	37	3	95%	79%	25.4
	38	2	97%	77%	25.3
	39	1	98%	75%	25.1
	40	1	99%	73%	25.1
	41	0	99%	71%	25.0

Three Levels of Value

Level 3
Strategic Value

Level 2
Customer Experience
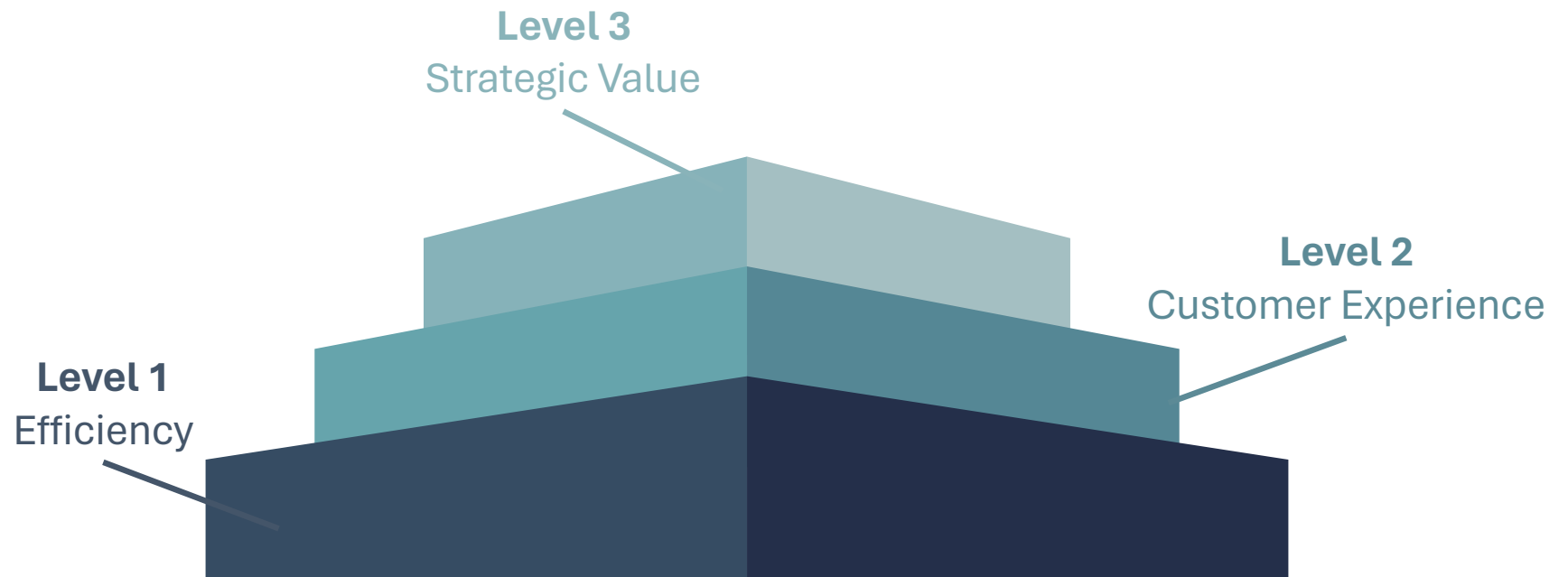
Level 1
Efficiency

The Best. The Rest.

- Three levels of value
  - Business case

2. The Driving Forces Behind Contact Centers

Random Workload Arrival
Contacts Bunch Up!
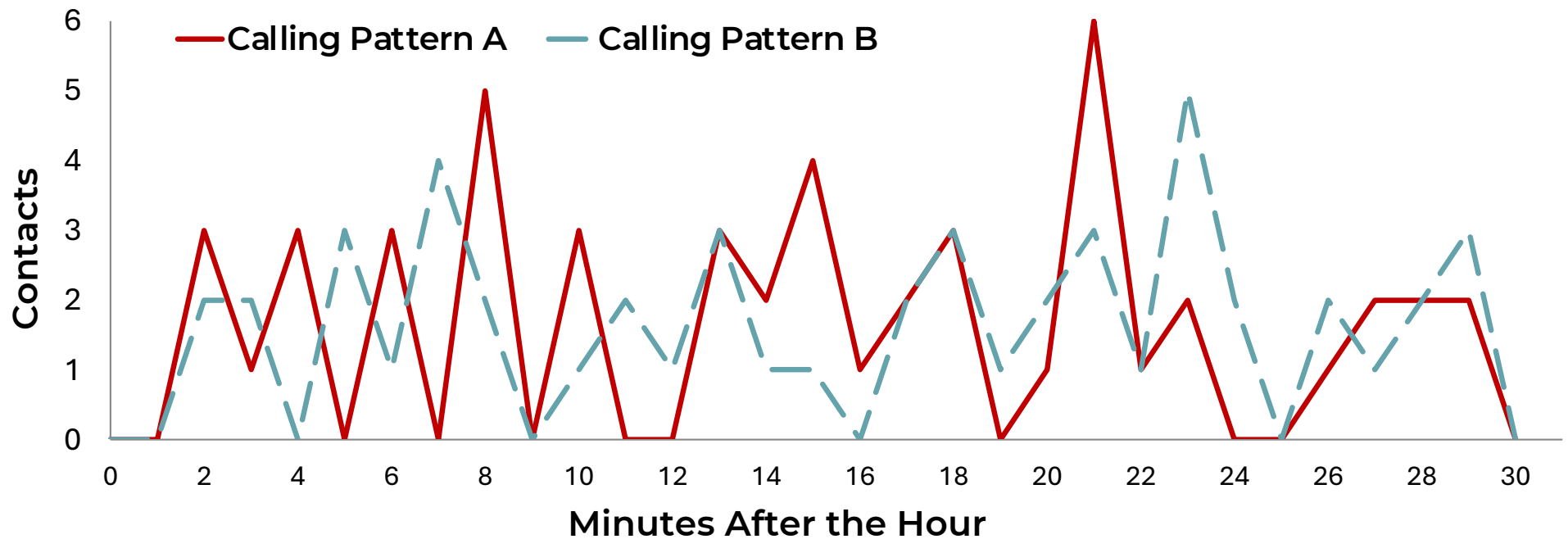
The Queue: Visible or Invisible?

VISIBLE QUEUE: grocery store, stadium, security

INVISIBLE QUEUE: many contact centers (not all)

TIME

The 7 Factors of Customer Tolerance

1. Degree of motivation

2. Availability of substitutes

3. Competition's service level

4. Level of expectations

5. Time available

6. Who's paying for the contact

7. Human behavior

The Best. The Rest.

- Collaboration when things aren't going well
  - Creativity in solving problems

3. Optimizing Contact Center Planning and Management

85%

Jobs that will exist in 2023 that haven't been invented yet.

Source: 2017 Dell Institute for the Future

Contact Center Management Is...

...the art of having the right number of properly skilled people and technology resources in place at the right times to handle an accurately forecasted workload at **service level** and with **quality.**

*Quality is comprehensive and strategic, e.g., it includes capturing input that can improve products, services, and processes.

Planning and Management Process

1. Choose service level and 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 and lower levels of service
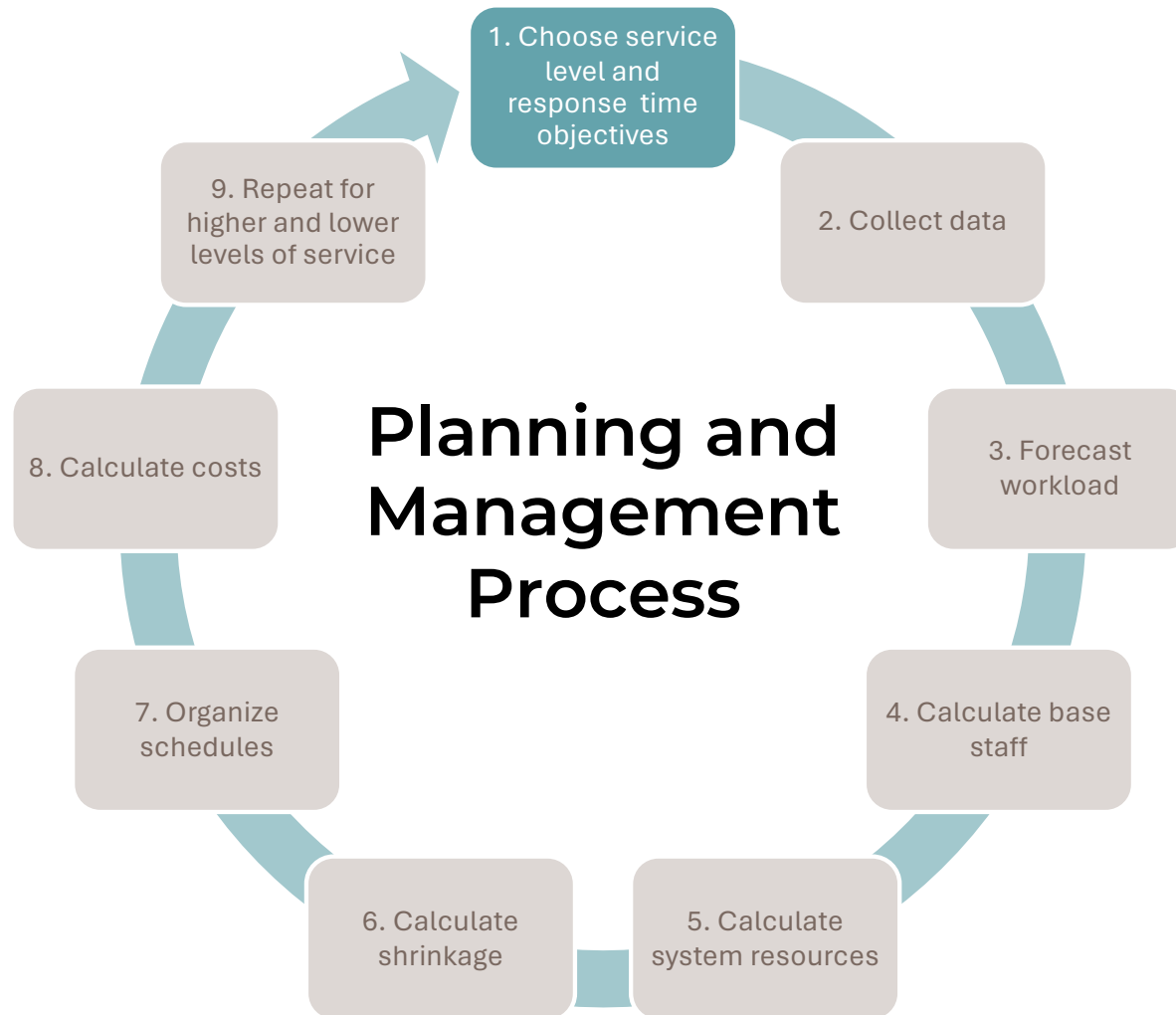
Service Level or Response Time?

1   **Those that must be handled when they arrive.**

Performance objective: <u>Service Level</u>

(Expressed as: X% of contacts answered in Y sec.)

2   **Those that can be handled at a later time.**

Performance objective: <u>Response Time</u>

(Expressed as: 100% response within N hrs/mins)

Service Level Objectives—Examples

- **Emergency services:** 100/0

- **High:** 90/20, 85/15, 90/15

- **Moderate:** 80/20, 80/30, 90/60

- **Modest:** 70/60, 80/120, 80/300

Inbound phone
Social—real-time
SMS/text
Web chat
Interactive video
Callback—call me now
Walk-in customers*

Response Time Objectives—Examples

Channel	Common	High End of Range
Customer email	Within 24 hours	Within 4 hours
Customer voicemail	Within 24 hours	Within 4 hours
Social—deferred*	Within 24 hours	Within 4 hours
Callback—call me later	As scheduled	n/a
Postal mail	Processed within two weeks	Processed within two days

*This refers to social interactions that do not require immediate response.

Trend to Watch: Organizations handling RT contacts as they arrive.

Erlang C (1917)

Alternative: Computer Simulation

$$P(>0) = \dfrac{\dfrac{A^N N}{N!\,(N-A)}}{\displaystyle\sum_{i=0}^{N-1} \dfrac{A^i}{i!} + \dfrac{A^N N}{N!\,(N-A)}}$$

WHERE

A = total traffic offered in erlangs

N = number of servers in a full availability group

P(>O) = probability of delay greater than O

P = probability of loss - - Poisson formula

The Workload Foundation

Talk Time: Everything from hello to goodbye

After Call Work: Immediately follows contact

Handling Time: Talk time + after-call work

Call Load: Volume X AHT

The Best. The Rest.

- Understanding workflow
  - IT's strategic support

4. Unlocking Immutable Laws for Enhanced Performance

Seated Agents vs. Service Level

A bar chart titled with y-axis "% Answered in 20 Seconds" (0–100) and x-axis "Seated Agents" (30–39):

Seated Agents	% Answered in 20 Seconds
30	24%
31	45%
32	61%
33	73%
34	82%
35	88%
36	92%
37	95%
38	97%
39	98%

Law of diminishing returns

Customers in Queue

		Average Talk Time*	180		Average After Contact Work Time*	30				
		Contacts Per Half Hour	250		Service Level Objective*	20				

		Number of customers waiting longer than x seconds								2 mins.	3 mins.
Agents	SL %	5	10	15	20	30	40	50	60	90	120	180
30	24%	203	199	195	191	184	177	170	163	145	129	101
31	45%	156	149	143	137	126	115	105	97	74	57	34
32	61%	118	111	104	97	85	74	65	56	38	25	11
33	73%	89	81	74	67	56	47	39	32	19	11	4
34	82%	65	58	52	46	37	29	23	18	9	5	1
35	88%	47	41	36	31	24	18	14	10	4	2	0
36	92%	34	29	24	21	15	11	8	6	2	1	0
37	95%	24	20	16	14	9	6	4	3	1	0	0
38	97%	16	13	11	9	6	4	2	2	0	0	0
39	98%	11	9	7	5	3	2	1	1	0	0	0
40	99%	7	6	4	3	2	1	1	0	0	0	0
41	99%	5	4	3	2	1	1	0	0	0	0	0

Customers in Queue

Average Talk Time*	**180**	**Average After Contact Work Time***	**30**
Contacts Per Half Hour	**1000**	**Service Level Objective***	**20**

Agents	SL %	Number of customers waiting longer than x seconds									2 mins.	3 mins.
		5	10	15	20	30	40	50	60	90	120	180
117	7%	955	948	940	933	918	904	889	875	835	796	724
118	24%	830	804	779	755	709	665	624	586	484	400	273
119	39%	719	681	644	609	545	488	436	390	280	200	103
120	51%	621	574	530	489	418	356	304	259	161	100	39
121	61%	534	482	435	392	319	259	211	172	92	50	14
122	69%	458	403	355	313	243	188	146	113	53	25	5
123	75%	390	336	289	248	184	136	100	74	30	12	2
124	80%	332	279	234	197	139	98	69	49	17	6	1
125	85%	281	230	189	155	104	70	47	32	10	3	0
126	88%	237	189	152	121	78	50	32	21	5	1	0
127	91%	198	155	121	95	58	35	22	13	3	1	0
128	93%	166	127	97	74	43	25	15	9	2	0	0
129	94%	138	103	77	57	32	18	10	5	1	0	0
130	96%	114	83	60	44	23	12	7	3	1	0	0
131	97%	94	67	47	34	17	9	4	2	0	0	0
132	97%	77	53	37	26	12	6	3	1	0	0	0
133	98%	63	42	29	20	9	4	2	1	0	0	0

The Dynamics of Size

Avg. Talk Time: 180 seconds
Avg. After Call Work: 30 seconds
Service Level: 80% in 20 seconds

Powerful pooling principle

Larger groups have higher occupancy

Size	Calls	Agents	Occupancy	Calls per Agent
50	9	65%	5.6	
100	15	78%	6.7	
250	34	86%	7.4	
1000	124	94%	8.1	

Handle **more contacts** at the same service level with the same number of agents
Handle the same number of contacts at the same service level with **fewer agents**
Handle the same number of contacts at a **better service level** with the same number of agents

The Best. The Rest.

- Simplification versus complexity
- Knowledge management (KM)

5. Service Level and Quality

1 in 4

Support organizations that provide more than 10 days of formal training each year, at any level.

Source: The State of Tech Support 2023, HDI

Components of a Quality Interaction (1 of 2)

- Contact is necessary in the first place
- Customer can access the contact channels desired
- Customer is not placed in queue for too long
- Customer is not transferred around
- Customer doesn't get rushed
- Agent provides correct response
- All data entry is correct
- Customer receives correct information
- Agent captures all needed/useful information

Components of a Quality Interaction (2 of 2)

- Customer has confidence contact was effective
- Customer doesn't feel it necessary to check-up, verify or repeat
- Customer is satisfied
- Agent has pride in workmanship
- Unsolicited product, service and marketplace feedback is detected and documented
- Others across the organization can correctly interpret and effectively use the information captured
- The organization's mission is furthered

Key Objectives / Metrics

- Strategic value

- Customer satisfaction / loyalty

- Employee satisfaction

- Quality / first contact resolution

- Service level / response time

- Adherence to schedule

- Forecast accuracy

Individuals: The Two Things that Really Matter

- Being in the right places at the right times—**adherence**

- Doing the right things (foundation and finesse) —**quality**

The Best. The Rest.

- Training, KM, agent-assist
  - The right dashboard

6. Shaping an Effective Customer Access Strategy

82%

Customers who say that the number one factor that leads to a great experience is having their issues resolved quickly and easily.

Source: International Customer Management Institute (ICMI)

10 Customer Expectations

Service Interactions

- **Be accessible** *(in the channels I prefer)*

- **Treat me courteously**

- **Be responsive to** *(and anticipate)* **what I need and want**

- **Do what I ask promptly**

- **Provide well-trained and informed employees**

- **Tell me what to expect**

- **Meet your commitments and keep your promises**

- **Do it right the first time**

- **Follow up**

- **Be socially responsible and ethical**

Customer Access Strategy

1. Customers
2. Contact types
3. Access alternatives
4. Hours of operation
5. Service level and response time objectives
6. Routing methodology
7. People/technology resources required
8. Information required
9. Analysis, improvement
10. Guidelines for deploying new services

The Best. The Rest.

- Clarity and alignment
- Departments in sync

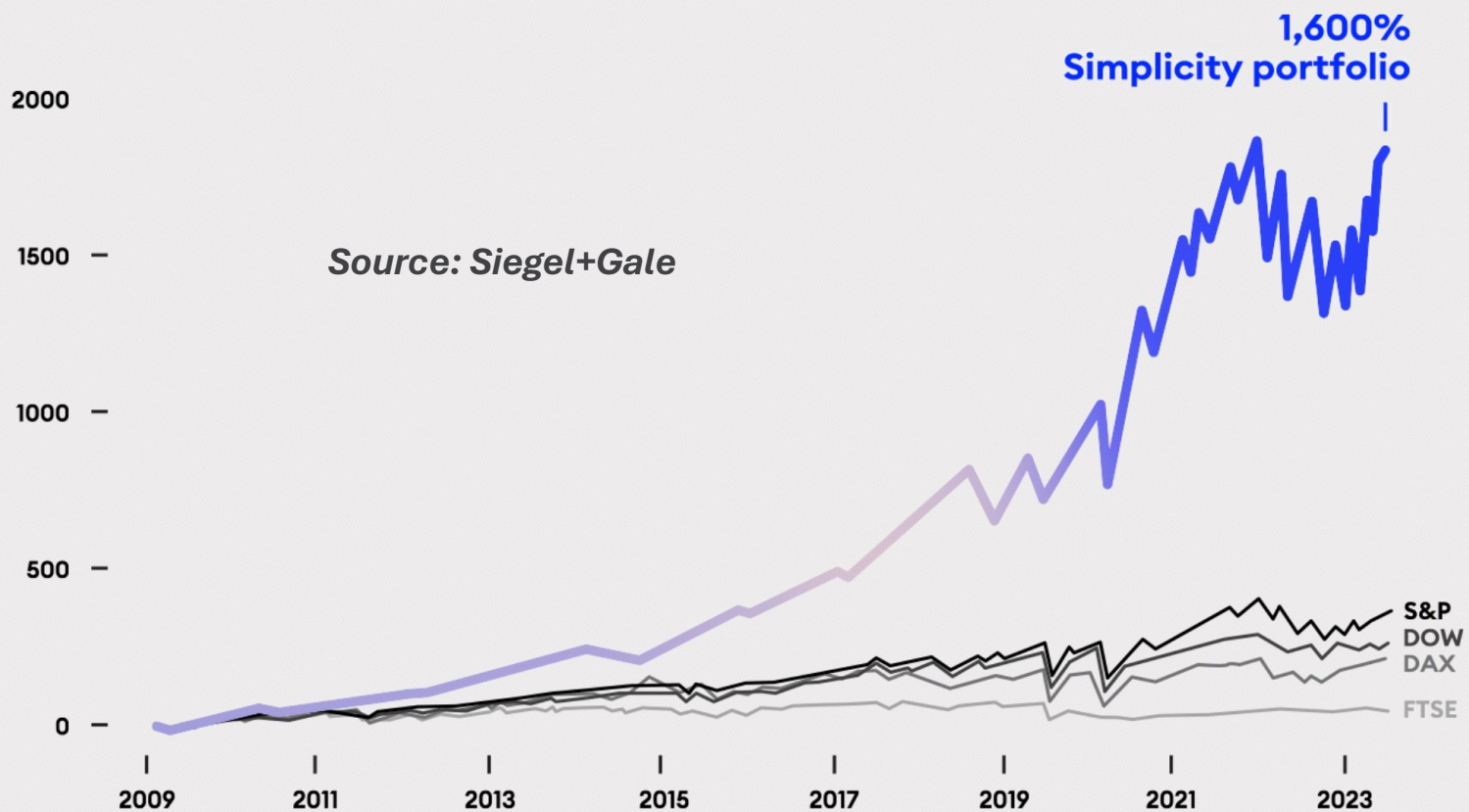# 7. The Nexus of Humans and Technology

+1600%

How much a portfolio of the world's simplest brands has beaten the average global stock index since 2009.

Source: Siegel+Gale

Simplicity performs

1,600%
Simplicity portfolio

Source: Siegel+Gale

S&P
DOW
DAX
FTSE

The Best. The Rest.

- AI's opportunity and peril
- Leadership

Vision without action is a daydream. Action without vision is a nightmare.

- Japanese Proverb

Brad Cleveland—Contact

Brad Cleveland is known globally for his expertise in customer strategy and management. He has worked across 45 states and 60 countries for clients as diverse as American Express, Apple, USAA, the University of California, and governments in the U.S., Canada, and Australia. Analysts have noted that it's likely that Brad has worked with more contact centers than anyone else worldwide.

Brad is author of *Contact Center Management on Fast Forward* (ICMI, 2019), which was recipient of an Amazon.com best-selling award, and *Leading the Customer Experience* (Kogan Page, 2021), a NYC Big Book Award distinguished favorite. His LinkedIn Learning courses have received close to 1 million views. Brad was founding partner and former CEO of the International Customer Management Institute (ICMI). Today, he is today a sought-after speaker and consultant.

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