

Benchmark Portal

The **SOURCE** for Contact Centers



BenchmarkPortal is the leader in Call Center Benchmarking, Call Center Training, and Call Center Consulting. Since its beginnings in 1995 under Dr. Jon Anton of Purdue University, BenchmarkPortal has grown with the contact center industry and now hosts the world's largest call center metrics database. Now led by Bruce Belfiore, the BenchmarkPortal team of professionals has gained international recognition for its call center expertise and innovative approaches to Best Practices for the call center industry. Join our community today by benchmarking your call center with one of our Benchmarking Surveys on our website.

Certification and Assessment Overview

As custodian of the largest database of contact center metrics in the world, BenchmarkPortal is the source for contact center best practices with our Benchmarking, Certification, Education and Consulting services. Our mission is to help customer contact managers in all sectors to optimize their centers in terms of efficiency and effectiveness.

The Center for Customer-Driven Quality database of key performance metrics, founded at Purdue University by Dr. Jon Anton, is collected from thousands of call centers and has become the worldwide source for best practice standards for customer service call centers. This database is managed, operated and maintained by BenchmarkPortal (BMP). BMP also manages the International Benchmarking Community, which is a membership organization of call center managers and quality assurance managers dedicated to using best practice comparison information as a key management decision driver. Additionally, BMP is the leader in benchmarking and certifying call centers utilizing the latest in database warehousing, data mining, and analytical toolsets. The data warehouse contains information on thousands of call centers.

The BMP database focuses on key performance indicators ("KPIs") including first contact resolution, customer satisfaction, cost per contact, personnel compensation, agent turnover, average talk time, and many more critical KPIs.

The BMP team performs research in all aspects of call center operations, and publishes books and white papers to inform call center managers about best practices in all areas of call center activity, including CRM, knowledge management, workforce optimization, quality management, contact center needs clarification and technology.

BMP also offers courses to all levels of contact center professionals through the College of Call Center Excellence. Another educational offering is the CallTalk™ show hosted by Bruce Belfiore and dedicated to exploring contact center topics with recognized industry experts (www.calltalk.tv).

BMP assists contact center managers to optimize their operations and attain best-in-class status. It is unique in its ability to both bring the latest in best practices research to its engagements, and measure client results against the appropriate peer group to provide objective validation of a center's competitive position.

BenchmarkPortal's Approach to Fulfill Engagement:

With the largest and most respected database of contact center metrics in the world, BMP is able to determine the best centers in a very objective fashion. Those who meet standards of superior quality and efficiency are awarded Certified *Center of Excellence* designation. Certification engagements include audit of management reports and operations to validate the metrics. Engagements can be for a single year or for multiple years. BenchmarkPortal's Multi-Year *Center of Excellence* Program leverages BenchmarkPortal's unique database of call center metrics for purposes of:

- 🕒 Identifying strengths and weaknesses in efficiency (costs) & effectiveness (satisfaction)
- 🕒 Identifying improvement initiatives that reduce expenses and improve quality
- 🕒 Helping calculate results of improvement initiatives in terms of:
 - 🕒 Financial benefit and ROI (identifying projects with the highest benefit for the lowest investment – “low hanging fruit”)
 - 🕒 Customer satisfaction
 - 🕒 Rewarding superior operational performance with certification as *Center of Excellence*.

This offering moves the *Center of Excellence* exercise from an annual "report card" on performance to an effective, multi-year management tool that guides measurement, decision-making and results tracking over time. By comparing metrics to those of competitive peers, the center sets appropriate goals and achieves results that add to company value and competitive position.

BMP's approach encourages a culture of continuous improvement, in which benchmarking, discovery and appropriate initiatives form a virtuous cycle that puts the center at the forefront of its industry and helps to keep it there over time.

The program's materials and methodologies include components that promote financial returns:

Cost of gap calculations: For each cost-related metric, our reports compare your performance to industry averages; negative gaps are quantified in terms of dollars, which focuses attention on important “pain points”.

Identifying processes which are the causes of these negative gaps

Identifying solutions to processes that can result in savings or in higher revenues

Our experts can help calculate ROI on these solutions, and assist in tracking results.

The result is a program that, itself, has a very robust ROI. Our experts invariably identify and add financial value that supersedes the cost of the *Center of Excellence* exercise. A multi-year engagement makes this virtuous cycle part of the DNA of center management, year after year.

The Multi-Year program allows managers to budget and lock in pricing for future years. Participants also become Preferred Partners and receive a 15% discount on BenchmarkPortal's training programs, industry reports, white papers and other products. Collateral benefits include marketing and investor relations (the Center of Excellence seal can be used all marketing materials and annual reports), recruitment & retention (certification as a Center of Excellence tells your people and recruits that you value quality and reward performance) and employee pride.

Additionally, with a Center of Excellence engagement, our clients have BenchmarkPortal's network of auditors and experts available to their team for conference calls and round table discussions about the issues, which your team is facing throughout the year. This makes sure that the assistance you receive goes beyond the metrics and includes practical advice on best practices that you can use right away. Whether it is a conversation about where to focus your customer satisfaction survey, or BMP's opinions on IVR optimization, we are here to act as Wells Fargo's resource for best practices at no additional cost to your organization. Of course, if one of these conversations turns into an additional initiative for which you need our services, we will respond to the request and offer you our best pricing as a Preferred Partner and member of our community.

BenchmarkPortal's Call Center Certification Database

One of a kind!

BenchmarkPortal maintains the world's largest call center database, which is a warehouse of call center best practice statistics on thousands of call centers in 48 industry segments. This performance data is kept current with daily submissions from call centers around the globe and is used by call center professionals worldwide to establish goals for best practice call center performance.



The Need for Call Center Certification

Since companies spend vast amounts of money implementing and operating call centers to ensure a competitive edge in customer service, it has become mandatory that the call handling process be conducted at best practice standards. This need to function at best practice levels has created the need for third-party certification that call centers are operating at this high level of call handling performance

Latest Testimonial:

"The Center of Excellence Program is more than just winning an award. It is a program designed to highlight gaps and opportunities within the Service and Support area of the company, much like a blueprint for success. Adding value to our support partnerships and raising the level of customer satisfaction, that is ultimately what the program is about."

Brian Wrage

*Director, Technical Support & Technology Systems,
Canon USA, Inc.*



Our Call Center Certification Process is Unique in the Following Ways:

- The process is based strictly on a quantitative approach, as compared to a qualitative approach, where most performance issues depend upon the judgment of a trained auditor.
- The process begins with a thorough statistical comparison between the call center striving to be certified and a "peer group" of similar call centers in the same industry sector.
- We use a "balanced scorecard" approach of performance comparison in which weighted KPI's from your center are compared to the industry selected for certification.
- Our analysis relies completely on statistical methods of performance benchmarking that pinpoint areas of high performance and quantify gaps in areas of low performance.
- Ours is the only certification that is academically based and that uses only established scientific methods to measure the achievement of certifiable best practices standards



Call Center Certification

There Are Four Phases To Call Center Certification

Phase One:

A 22 KPI Benchmarking Survey - In-Depth RealityCheck™ is completed by your call center. In this process, we compare your performance is compared with a statistically valid sample of call centers in your industry segment. We conduct a "deep dive" into the major gaps that were highlighted in this report. The call center's ACD report is mailed to BenchmarkPortal so that an independent auditor can confirm that submitted data is accurate. This discovery process focuses on the 22 key performance indicators (KPI's) that are listed below:



Effectiveness Metrics:

- First Call Resolution
- Agent Satisfaction
- Top Box Caller Satisfaction in Percent
- Bottom Box Caller Satisfaction
- Top Box Agent Satisfaction in Percent
- Bottom Box Agent Satisfaction in Percent
- Calls Closed on First Call in Percent
- Average Speed of Answer in Seconds
- Calls Transferred in Percent
- Average Hold Time in Seconds
- 80% of Calls Handled in xx Seconds
- Average Time in Queue in Seconds
- Average Calls Abandoned in Percent

Efficiency Metrics:

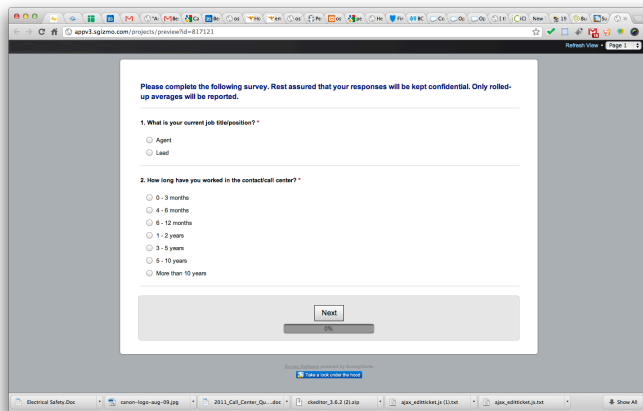
- Inbound Calls per Agent per Hour
- Cost per Call in Dollars
- Average After Call Work in Minutes
- Turnover of Full-time Agents in Percent
- Average Talk Time in Minutes
- Agent Utilization in Percent
- Agent Occupancy in Percent
- Adherence to Schedule in Percent
- Average Agent Attendance in Percent
- Auxiliary Time in Percent
- Agents/Supervisor Ratio

Phase Two:

We conduct an independent caller satisfaction survey to ensure that you have reached the desired service levels necessary for full certification. The call center seeking certification will supply us with 500 names and numbers of recent customers. We then conduct an independent phone survey of the customers on this list.

Phase Three:

We conduct an independent agent satisfaction survey to ensure that you have reached the desired levels needed for full certification. This is conducted via a web-based survey sent to the agents in the call center looking to reach certification.



Agent Satisfaction Survey Online form

Phase Four:

At least one member of the Team will conduct a two-day site visit to the call center location to:

- 🔗 Audit and validate all of the necessary call center performance benchmark data
- 🔗 Assessment can be customized to meet the needs of the client
- 🔗 Perform an operational assessment of the center.*

**Please see the attached sample agenda for additional details*

The visit will begin with an orientation meeting with the Client management team. During this meeting, BMP will receive an overview of operations with the Client's managers and a review the current management objectives (i.e., operational goals vs. performance, performance appraisal criteria, and the like). Then the Client will provide a tour of the center to the assessment Team. This will give BenchmarkPortal a high level view of the call centers operations.

Following the tour, BenchmarkPortal's team will conduct side-by-side observations with Agents. The team will also conduct focus groups with Agents and Supervisors. Based on the responses from caller-feedback surveys fielded ahead of the visit, BenchmarkPortal will review the improvement processes that are tied to caller feedback. There will also be scheduled discovery sessions with other key functional areas (i.e., hiring, screening, training, call monitoring, human resources, workforce optimization, etc.). This part of the review is based on the 24 processes of the call center that is reviewed below:

24 Processes

- 🔗 Hiring New Agents
- 🔗 Training Agents
- 🔗 Agent Development
- 🔗 Real-Time Expert Hub for Agents
- 🔗 Agent Compensation
- 🔗 Service Improvement Initiatives
- 🔗 Information Access
- 🔗 Agent Satisfaction Measurement
- 🔗 Call Quality Monitoring
- 🔗 Agent Coaching
- 🔗 Call Routing
- 🔗 Call Center Communications
- 🔗 Analytics and Reporting
- 🔗 Call Center Performance Evaluation
- 🔗 Caller Satisfaction Measurement
- 🔗 Caller Service Recovery
- 🔗 Agent Workforce Optimization
- 🔗 Caller Self Service
- 🔗 Performance Benchmarking
- 🔗 Caller Relationship Management
- 🔗 Teleservices Outsourcing
- 🔗 Facilities Management
- 🔗 Information Technology
- 🔗 Telecommunications

Our methodology maps negative gaps shown in the In-Depth RealityCheck benchmark report, as well as problems that surface involving operations, to these primary contact center processes. Sub-processes are also explored. For example, the Hiring New Agents process includes discovery on sub-processes such as job descriptions, recruitment strategies, screening tools, interviewing processes, etc. The result is a robust inquiry into processes that need attention.

BenchmarkPortal will document everything that is discovered on the two-day assessment. The Client will receive, a formal findings and recommendations presentation within two weeks of the on-site visit. BenchmarkPortal will present its report via gotomeeting. For an additional charge BenchmarkPortal can deliver its presentation onsite at Client's desired location.

If the Client's center meets the criteria for Center of Excellence certification, then certification will be awarded with no further cost to the Client. The Client will receive a trophy, plaque and banner to honor this accomplishment, as well as a congratulatory letter from Bruce Belfiore to the appropriate senior manager of the Client. However, if the Client center does not meet the criteria for Center of Excellence certification, then certification will not be awarded. During the Executive presentation the Client will receive a detailed explanation of the reasons why they did not achieve certification. The Auditor will review steps that can be taken to improve their performance metrics during this presentation. Additionally, the Client will be allowed to resubmit data within 6 months from date of the Executive Presentation at no additional charge. BenchmarkPortal will audit this data and, if the data shows that the center has achieved certification status, then the center will be awarded certification.



BenchmarkPortal On-Site Assessment Agenda

<p>Organization: strategy, communication, state of current ops</p> <ul style="list-style-type: none"> • Discuss Current Service Situation, Key Metrics • Discuss Current Site Strengths & Weaknesses • Establish Client/Corporate Strategy: Reduction, Retention, Revenue 	<p>Managers 9-10 am</p>
<p>Human Resources:</p> <ul style="list-style-type: none"> • Map criteria and tools used in recruiting and selection • Review CSR Satisfaction and motivation • Discuss Attrition Rates & Exit Interview Process 	<p>10-11 am</p>
<p>Quality/Training Team:</p> <ul style="list-style-type: none"> • Meet with Quality process team and reviews Processes • Review training materials and documentation. • Review Customer Satisfaction Process and Survey Results 	<p>11-12 am</p>
<p><i>Lunch: open with management</i></p>	<p>12-1</p>
<p>CSR calls: side by side monitoring live calls</p> <ul style="list-style-type: none"> • Observe and Review calls and content • Set time to listen and review live calls (2 agents, 30 mins each) • Review the quality form, • Analyze the screen navigation, • Listen to caller satisfaction 	<p>1:30-2:30 pm</p>
<p>CSR Focus Group:</p> <ul style="list-style-type: none"> • Schedule time to discuss their role in customer service and satisfaction • 2 groups: 5 CSR's of varying tenure for 30 minutes each 	<p>3-4:30 pm</p>
<p><i>Day Two</i></p>	
<p>Technology: ACD reporting, scheduling, or other reports</p> <ul style="list-style-type: none"> • Review technologies used and technology plan • Review Call Type, Volume, Staffing, and Routing output (WFM) • Review IVR performance, abandon, alternate channels WEB or email • Analyze Mgmt Reports, Key indicators, FAQ's • Meet with Operations Management on additional key processes. 	<p>9-11 am</p>
<p>Team Supervisors/Leads Focus Group Review Agent Reporting, Motivation, Incentives, Compensation, Satisfaction Discuss performance reviews, call flow process, complaint handling, escalation</p> <ul style="list-style-type: none"> • Review team management goals and time management • Review feedback on fulfillment, including external departments 	<p>11:30-1 w/lunch</p>
<p>Facilities: logistics and layout – Site Tour</p> <ul style="list-style-type: none"> • Observe site layout, cube configuration, ergonomics, break rooms • Observe the visual communications, reader boards 	<p>1:30-2 pm</p>
<p>Fact Checking/Follow-up meeting</p> <ul style="list-style-type: none"> • Gather additional data or comments for discovery • Address any open items and conclude the site v 	<p>2-4 pm As needed</p>