ASSESSING & BENCHMARKING YOUR CONTACT CENTRE

ASSESS360

METHODOLOGY©

Developed by

ROD JONES CONTACT CENTRE CONSULTING



Accredited member

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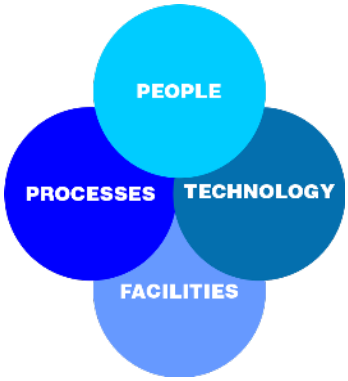
INTRODUCTION

In recent times, call centres, contact centres and customer interaction centres have become increasingly more important to virtually all organisations where success is largely measured in terms of Customer Experience. 'Success' obviously includes aspects such as Customer Satisfaction, Customer Loyalty and Customer Value and a range of other metrics not the least of which is financial performance.

To achieve excellence across these measures, most contact centre executives and managers are faced with five key challenges or Driving Dynamics.

- Reduce operating costs
- Increase efficiencies
- Increase revenues
- Reduce or mitigate risks
- Increase customer satisfaction



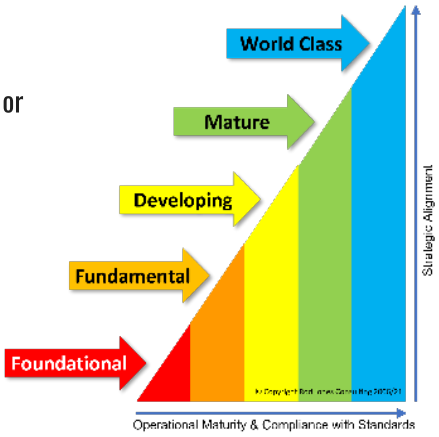
Contact centre operators experience further challenges as these Driving Dynamics occur in all four of the operation's focus areas. • People • Processes • Technologies • Facilities

The Contact Centre Development Model

By their very nature, all contact centres follow a 5-phase development path, from entry-level or 'Foundational' and eventually having the prospect of becoming certified as 'World Class'.

Three key factors influence these ratings:

- Alignment with the organisation's strategic and tactical vision
- Compliance with internal and external standards
- Audited and benchmarked against similar operations



Why Assess & Audit your Contact Centre?

Why should you audit, baseline and then benchmark your call centre or contact centre or customer service centre? In the simplest terms possible: So that you can improve its performance. Or, putting it plainly: If you are NOT constantly making improvements and positive adjustments to every facet of the ecosystem that is your contact centre operation, the certainty is that it will be constantly deteriorating.

The ASSESS 360 Methodology

This robust contact centre assessment methodology has been developed over more than a two decades by industry veteran Rod Jones, founder of Rod Jones Consulting. With contact centre experience of almost 45 years, Rod is widely recognised and ranked amongst the foremost contact centre and CX consultants in Africa.

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Assessing and Benchmarking CX Enabled Customer Contact Centres

In forward-thinking, successful organisations, the contact centre is evolving rapidly, and it is anticipated that by 2025 it will be virtually unrecognisable. In the latter part of the past decade, many contact centres have started moving away from the traditionally accepted role as 'Reluctantly Funded Cost Centres' to become Measurable Value Centres.

For many astute organisations, the goal is to have the contact centre recognised by the boardroom as a Quantifiable Revenue and Profit Centre; a vital business unit serving the greater organisation.

To be effective and to ensure that the organisation remains relevant and profitable, the contact centre will need to be viewed by the executives as a significant strategic resource. To this end, the centre will require significant investments and experienced manpower to develop into a true Omnichannel Customer Interaction and Engagement Centre.



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According to the authoritative CCConsult Network, to be recognised as World Class, contact centres need to achieve high levels of competence and compliance competence in three specific areas:-

- The contact centre operations must maintain consistent alignment with the organisation's core business strategies as well as being agile and responsive to any tactical changes as may be directed by the organisation's most senior executives.
- The contact centre must meet specific and clearly defined and well documented operational standards and Key Performance Indicators and must be able to pass an independent, external audit achieving a better than 85% compliance with those standards as defined by the organisation, as well as with any relevant industry, statutory, regulatory, or contractual standards or SLAs.
- World Class contact centres are required - at least on an annual basis - to be benchmarked against similar operations and must achieve a minimum of 85% compliance with globally recognised best practice standards and KPIs.

Benefits of a World-Class Contact Centre

- Highly effective customer interaction handling, resulting in optimized customer experience, minimized customer effort, high customer satisfaction ratings, customer retention and predictable lifetime value to the organisation.
- Streamlined and efficient operations, optimizing the utilization of manpower, technologies, financial other resources.
- The source of credible and reliable business intelligence and actionable insights contributing to the organisation's competitive advantage and profitability.

The well-proven Rod Jones contact centre assessment and auditing methodology has been developed over a period of almost twenty years and has been constantly refined and adapted to be relevant to the contemporary contact centre business environment and is aligned to global CX trends and best practice guidelines.



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The assessment and auditing process is carried out in five distinct stages.

Stage ONE: Discovery - Understanding

Purpose: To fully understand the business and the operating environment.

Phase One: Understand Business & Management Practices

Methodology: Consultant facilitated discovery workshops with senior management using the 360 Survey Methodology and Questionnaire

Phase Two: To understand the Contact Centre Human Capital (Agents, Team Leaders, Supervisors, QA, WFM specialists, Trainers etc.)

Methodology: Based on the Executive Workshop findings, develop a customized personnel survey for completion by contact centre and other identified Personnel (sampling methodology to be agreed upon)

Consultants: Consultants to implement and analyze personnel survey results

Phase Three: Review and Evaluate Documentation

Methodology: The organisation's designated business assessment project coordinator or administrator is to collect and collate a comprehensive documentation pack for assessment and auditing by the consultants as may be defined in the Executive and Management Workshops detailed above, including but not limited to the following:

- Detailed Organisation Structure
- Current Job Descriptions and KPIs
- Operations Manual – SOPs
- Processes and procedures related to the Contact Centre and any back-office areas that they interact with
- HR Recruitment processes
- Quality Assurance methodology and sample scorecards
- Guide to the QA Scorecard
- QA outputs including coaching documentation and record-keeping
- WorkForce Management methodology, documentation and reports (for previous 3 months)
- Multi-channel / Omnichannel interaction routing schemes/flows and scripting (by channel)
- All available training materials and training assessment tools and sample reports
- Customer interaction and CRM report by all channels (for previous 3 months)
- Customer Satisfaction methodology and reporting (for previous 3 months)
- Customer Complaints management methodology and reporting (for previous 3 months)
- Access by Consultants to Call Recordings (sampling methodology to be agreed)
- Personnel performance review methodology and documentation
- House rules / Organisational Policies. Appropriate documentation

Consultants: Consultants to review and evaluate all documentation provided.

Stage One Discovery Feedback Workshop

- High level SWOT analysis based on initial observations and findings
- Recommendations (Quick Wins and longer-term actions)
- Review next steps and agree on timelines



Stage TWO: Human Capital Assessment

Purpose: To fully understand skills, competencies and behaviours, attitudes and aspirations (e.g. career path) of all personnel

Methodology:

- Conduct virtual discussions / interviews with representative sample of personnel who completed the surveys (as above)
- On-the-job competency assessment of representative sample of personnel
- Review of human capital / staffing resourcing aligned with organisational SLAs and business objectives

Stage TWO Human Capital Assessment Feedback Workshop:

- High-level SWOT Analysis based on initial observations and findings
- Recommendations (Quick Wins and Longer-Term Actions)
- Review next steps and agree on timelines



Stage THREE: Technology Assessment

Purpose: Fully understand the organisation's overall IT environment (and specifically, the contact centre) and mid-and long-term strategies

Methodology: Using proprietary checklists and questionnaires:

- Workshop with relevant Senior IT Executive / Managers to understand the Technology – current and future planning
- Technology architecture and infrastructure
- Connectivity
- Change Management – Policies, Procedures and Documentation

Understand the Interaction Channels (current and planned)

Methodology: Using proprietary checklists and tools

- Workshop and review channel strategies, implementations, operational impact etc. (Utilise the proprietary COSAM Methodology)

Review Disaster Recovery & Business Continuity

- Strategy
- DR and BC Plan
- DR/BCP test reports

Consultants: Consultants to review and evaluate all documentation provided

Stage THREE Technology Assessment Feedback Workshop

- High-level SWOT Analysis based on initial observations and findings
- Recommendations (Quick Wins and Longer-Term Actions)
- Review next steps and agree on timelines



Stage FOUR: Operating Environment and Facilities Assessment

Review of the environment and facilities in terms of:

- Fit for Purpose
- Compliance with Regulations (e.g. Health and Safety)
- Compliance with Corporate Policies

Methodology: Physical assessment of the environment.

(Including but not limited to the following)

- Workspace size and space around each cubicle/desk
- Seating
- Lighting – including natural light
- Temperature and airflow
- Sound/noise levels
- Ambience / colour
- Divider screens and acoustics
- Pause Area / chill-room
- Kitchens and pause area facilities
- Toilet / ablution facilities
- Differently-abled facilities i.e. Wheelchair friendly ramps, lifts etc.
- Lockers – clean desk policy in place
- Proximity to and availablity of training rooms
- Breakaway rooms / coaching rooms
- Manager area – open plan/office
- Space Planning

Stage FOUR: Operational Environment and Facilities Feedback Workshop

- High-level SWOT Analysis of the operating environment.
- Recommendations (Quick Wins and Longer-Term Actions)
- Review next steps and agree actions.



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Stage 5:
Final Presentation Workshop

Consultants present the consolidated assessment, audit findings and recommendations.

- High level SWOT analysis by stage
- Recommendations (Quick wins and longer term Actions)

Final Deliverables by Consultants

- PowerPoint deck of the final presentation
- Copies of all interim presentations and reports
- Overall assessment and auditors' report

For More Information

For more information about the Assess 360 contact centre assessment and auditing methodology and other consulting services, or to request a proposal or quotation, please contact Rod Jones.