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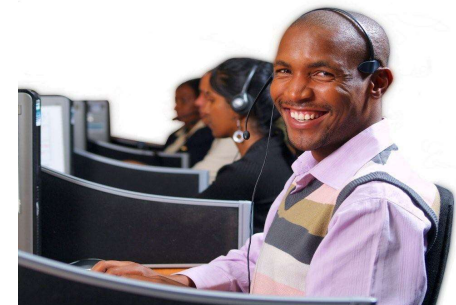
CONTACT CENTRE

Key Performance Indicators - KPIs

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These Contact centre KPI's, Definitions and Standards have been compiled to provide contact centre professionals with some guidelines for the establishment of specific KPIs most appropriate to their respective contact centres. For more information or consulting assistance please contact me at rod@rodjones.co.za

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					Dimension Data / Merchants						
			Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Standards KPIs	Outbound Interactions - Voice Customer Interaction	S1.1	Yield	Number of outputs required, per agent, per hour			Client Specific Target				
		S1.2	List Backlog	Percentage of records not used in relation to forecast, to reach target			Maximum one overdue cycle				
		S1.3	Volume	Total number of outputs achieved			Client Specific Target				
		S1.4	Productivity	Percentage of customer-facing time/total time worked			Minimum 65 %				
		S1.5	Average Handling Time (AHT)	Average of the sum of (talk time + after-call work + holding time) for agents			Client-specific target				
		S1.6	Quality	Critical-error accuracy = mistakes which put the business at risk. Non-critical-error accuracy = mistakes which indicate softer issues and lesser risk			Critical errors: Maximum 3 %. Non-critical errors: Maximum 5 %				
		S1.7	Abandonment rate (for predictive dialler)	Percentage of calls dropped by customers before being routed to an agent			Maximum 5 %				
Standards KPIs	Outbound Interactions - Voice Escalations	S1.8	On-time	Percentage of escalations handled within cycle time			Client-specific target by enquiry type				
		S1.9	Backlog	Number of overdue cycles			Client-specific target by enquiry type				
		S1.10	Volume	Number of escalations sent			Client-specific target by enquiry type				
		S1.11	Quality	Accuracy rate = 1 - rework rate (express result as a percentage)			Client-specific target by enquiry type				
Standards KPIs	Outbound Interactions - Electronic Customer Interactions	S1.12	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time			Client-specific target by enquiry type				
		S1.13	List backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle				
		S1.14	Volume	Total number of transactions conducted			Client-specific target by enquiry type				
		S1.15	Utilization	Interaction time as a percentage of total time worked less breaks			Minimum 80 %				
		S1.16	Average handling time	Average time worked on an electronic interaction			Client-specific target by enquiry type				
		S1.17	Quality	Critical error accuracy – mistakes that put the business at risk. Non-critical-error accuracy – mistakes that indicate softer issues			Critical errors: Maximum 3 %. Non-critical errors: Maximum 5 %				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Standards KPIs	Outbound Interactions - Electronic Escalations	S1.18	Yield	Percentage of escalations handled within cycle time			Client-specific target by enquiry type			
		S1.19	Backlog	Number of overdue cycles			Client-specific target by enquiry type			
		S1.20	Volume	Number of escalations sent			Client-specific target by enquiry type			
		S1.21	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)			Client-specific target by enquiry type			
Standards KPIs	Outbound Mngt Practice - Capacity Planning	S1.22	On-time	Number of outputs required – per agent – per hour			Maximum 5 % variance above or below forecast			
Standards KPIs	Outbound Mngt Practice- Management of Internal Support Departments	S1.23	On-time to respond/deliver	Percentage of service requests responded to within cycle time			Minimum 85 %			
		S1.24	On-time to resolve	Percentage of service requests completed to within cycle time			Minimum 80 %			
		S1.25	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt			
		S1.26	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
		S1.27	Volume of enquiries	Number of queries sent per time period indicated			No benchmark			
Standards KPIs	Outbound Mngt Practice - Management of External Service Suppliers	S1.28	On-time to respond/deliver	Number of queries sent per time period indicated			Minimum 85 %			
		S1.29	On-time to resolve	Percentage of service requests responded to within cycle time			Minimum 80 %			
		S1.30	Quality of resolution	Percentage of service requests completed within cycle time			Minimum 80 % resolved on first attempt			
		S1.31	Response/delivery backlog	Accuracy rate = 1 – rework rate (express result as a percentage)			Maximum one overdue cycle			
		S1.32	Volume of enquiries	Number of queries sent per time period indicated			No benchmark			
Standards KPIs	Outbound Mngt Practice - Facilities Management	S1.33	On-time to respond/deliver	Number of overdue cycles (how far behind target are you?)			Minimum 85 %			
		S1.34	On-time to resolve	Number of queries sent per time period indicated			Minimum 80 %			
		S1.35	Quality of resolution	Number of outputs required – per agent – per hour			Minimum 80 % resolved on first attempt			
		S1.36	Response/delivery backlog	Percentage of service requests responded to within cycle time			Maximum one overdue cycle			
		S1.37	Volume of enquiries	Number of queries sent per time period indicated			No benchmark			

					Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)						
Standards KPIs	Outbound Mngt Practice - Mngt of technical support	S1.38	On-time to respond/deliver	Percentage of service requests completed within cycle time			Minimum 90 %				
		S1.39	On-time to resolve	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 %				
		S1.40	Quality of resolution	Number of overdue cycles (how far behind target are you?)			Minimum 80 % resolved on first attempt				
		S1.41	Response/delivery backlog	Number of queries sent per time period indicated			Maximum one overdue cycle				
		S1.42	Volume of enquiries	Percentage of service requests responded to within cycle time			No benchmark				
Standards KPIs	Outbound Mngt Practice - Data/list management	S1.43	On-time. Backlog. Quality.	Monitoring access to call records - Percentage of service requests completed within cycle time			Daily / Monthly				
Standards KPIs	Outbound Mngt Practice - System availability	S1.44	System availability	Tracking of all key systems that impact on service delivery. Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 98 %				
Standards KPIs	Outbound Mngt Practice - Client Satisfaction	S1.45	Client Satisfaction	Number of overdue cycles (how far behind target are you?)			Minimum 80 % of top two boxes on a Lickert scale of 1 to 5				
		S1.46	Ratio of complaints to contacts	Number of queries sent per time period indicated			Client-specific target				
Standards KPIs	Outbound Mngt Practice - Staff satisfaction (for campaigns that run over 1 yr)	S1.47	Staff satisfaction	A staff satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 70 % of top two boxes on a Lickert scale of 1 to 5				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
Standards KPIs	Outbound Mngt Practice - Cost of failure	S1.48	Repeat call per customer	Ratio of customers to the number of times they call in a month. This will serve to facilitate the process issues and dependency issues that might cause customer complaints. The contact centre shall calculate the cost to serve and to recover service on a cost-per-minute basis. This will indicate how expensive failure is and will facilitate pricing when quotes of various processes are given to clients		Client-specific target				
Standards KPIs	Outbound Mngt Practice - Staff efficiency	S1.49	Occupancy	Talk time + holding time + after-call work/total time worked – breaks (as a percentage)		Maximum 70 % to 80 %				
		S1.50	Absenteeism	Number of days lost as a percentage of days scheduled		Maximum 10 %				
		S1.51	Attrition	Number of staff per role category lost as a percentage of total staff on the floor per role category		Maximum 20 % (annualized basis)				
		S1.52	Utilization	(Total talk time + available time + holding time + after-call work + authorized auxiliary states)/expressed as a percentage		Minimum 80 %				
		S1.53	Average handling time	Average of all agents' talk time + after-call work + holding time		Client-specific target				
Standards KPIs	Interactions - Voice Customer Interaction	S2.1	Service level/on-time	The percentage of total calls offered to the skills group that are answered by an agent before the threshold time, e.g. 90/20 indicates that 90 % of calls offered shall be answered within 20 s		Client-specific target				
		S2.2	Abandonment rate	The percentage of calls offered that are dropped by the caller		Client-specific target/maximum 5 %				
		S2.3	Volume	The number of calls offered to the contact centre		No benchmark				
		S2.4	Utilization	Total talk time + available time + holding time + after-call work + authorized auxiliary time / staffed time, expressed as a percentage		Minimum 80 %				
		S2.5	Occupancy	Talk time + holding time + after-call work / staff time – breaks, expressed as a percentage for agents		Maximum 70 % to 80 %				
		S2.6	Average Handling Time	Average of the sum of (talk time + after-call work + holding time) for agents		Client-specific target				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
	Inbound	S2.7	Quality	Critical-error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues	Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %	Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %	Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %			
		S2.8	Forecast accuracy	Percentage of variance between actual call arrival and call arrival forecast			Maximum 10 % variance			
Standards KPIs	Inbound Interactions - Voice Escalations	S2.9	On-time	Percentage of escalations handled within cycle time			Client-specific target by enquiry type			
		S2.10	Backlog	Number of overdue cycles			Client-specific target by enquiry type			
		S2.11	Volume	Number of escalations sent			Client-specific target by enquiry type			
		S2.12	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)			Client-specific target by enquiry type			
Standards KPIs	Inbound Interactions - Email Customer Interactions	S2.13	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time			Client-specific target			
		S2.14	Backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
		S2.15	Volume	Total number of transactions conducted			No benchmark			
		S2.16	Utilization	Interaction time as a percentage of staffed time worked less breaks			Minimum 80 %			
		S2.17	Average handling time	Average electronic interaction handling time			Client-specific target by enquiry type			
		S2.18	Quality	Critical error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues			Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %			
Standards KPIs	Inbound Interactions - Email Escalations	S2.19	On-time	Percentage of escalations handled within cycle time			Client-specific target by enquiry type			
		S2.20	Backlog	Number of overdue cycles			Client-specific target by enquiry type			
		S2.21	Volume	Number of escalations sent			Client-specific target by enquiry type			
		S2.22	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)			Client-specific target by enquiry type			

			Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Standards KPIs	Inbound Interactions - Voicemail message retrieval	S2.23	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time		Client-specific target			
		S2.24	Backlog	Number of overdue cycles (how far behind target are you?)		Maximum one overdue cycle			
		S2.25	Volume	Total number of transactions conducted		No benchmark			
		S2.26	Utilization	Interaction time as a percentage of staffed time worked less breaks		Minimum 80 %			
		S2.27	Average handling time (AHT)	Average electronic interaction handling time		Client-specific target			
		S2.28	Quality	Critical error accuracy = mistakes which put the business at risk. Non-critical-error accuracy = mistakes which indicate softer issues at lesser risk		Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %			
Standards KPIs	Inbound Interactions - Voicemail message retrieval Escalations	S2.29	On-time	Percentage of escalations handled within cycle time		Client-specific target by enquiry type			
		S2.30	Backlog	Number of overdue cycles		Client-specific target by enquiry type			
		S2.31	Volume	Number of escalations sent		Client-specific target by enquiry type			
		S2.32	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)		Client-specific target by enquiry type			
Standards KPIs	Inbound Interactions -Fax Response	S2.33	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time		Client-specific target			
		S2.34	Backlog	Number of overdue cycles (how far behind target are you?)		Maximum one overdue cycle			
		S2.35	Volume	Total number of transactions conducted		No benchmark			
		S2.36	Utilization	Interaction time as a percentage of staffed time worked less breaks		Minimum 80 %			
		S2.37	Average handling time	Average electronic interaction handling time		Client-specific target			
		S2.38	Quality	Critical error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues		Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %			

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
Standards KPIs	Inbound Interactions - Fax Escalations	S2.39	On-time	Percentage of escalations handled within cycle time		Client-specific target by enquiry type				
		S2.40	Backlog	Number of overdue cycles		Client-specific target by enquiry type				
		S2.41	Volume	Number of escalations sent		Client-specific target by enquiry type				
		S2.42	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)		Client-specific target by enquiry type				
Standards KPIs	Inbound Interactions - Web chat	S2.43	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time		Client-specific target				
		S2.44	Backlog	Number of overdue cycles (how far behind target are you?)		Maximum one overdue cycle				
		S2.45	Volume	Total number of transactions conducted		No benchmark				
		S2.46	Utilization	Interaction time as a percentage of staffed time worked less breaks		Minimum 80 %				
		S2.47	Average handling time (AHT)	Average electronic interaction handling time		Client-specific target				
		S2.48	Quality	Critical error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues		Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %				
Standards KPIs	Inbound Interactions - Web Chat Escalations	S2.49	On-time	Percentage of escalations handled within cycle time		Client-specific target by enquiry type				
		S2.50	Backlog	Number of overdue cycles		Client-specific target by enquiry type				
		S2.51	Volume	Number of escalations sent		Client-specific target by enquiry type				
		S2.52	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)		Client-specific target by enquiry type				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Standards KPIs	Inbound Mngt Practice - Capacity Planning	S2.53	Arrival patterns Forecast accuracy	Arrival patterns shall be tracked at 30 min intervals for voice contacts and at cycle intervals for non-voice contacts. Documented capacity planning process which shall take service level, average handling time and volume into account (using an Erlang C model to calculate the number of agents required for inbound calls) Percentage of variance between actual call arrival and call arrival forecast			Maximum 5 % variance above or below forecast			
Standards KPIs	Inbound Mngt Practice - Management of Internal Support Departments	S2.54	On-time to respond/deliver	Percentage of service requests responded to <u>within cycle time</u>			Minimum 85 %			
		S2.55	On-time to resolve	Percentage of service requests completed to <u>within cycle time</u>			Minimum 80 %			
		S2.56	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt			
		S2.57	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
Standards KPIs	Inbound Mngt Practice - Management of External Service Suppliers	S2.58	On-time to respond/deliver	Percentage of service requests <u>responded to within cycle time</u>			Minimum 85 %			
		S2.59	On-time to resolve	Percentage of service requests completed within <u>cycle time</u>			Minimum 80 %			
		S2.60	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt			
		S2.61	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
Standards KPIs	Inbound Mngt Practice - Facilities Management	S2.62	On-time to respond/deliver	Percentage of service requests <u>responded to within cycle time</u>			Minimum 85 %			
		S2.63	On-time to resolve	Percentage of service requests completed within <u>cycle time</u>			Minimum 80 %			
		S2.64	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt			
		S2.65	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
Standards KPIs	Inbound Mngt Practice - Mngt of technical support	S2.66	On-time to respond/deliver	Percentage of service requests completed within <u>cycle time</u>			Minimum 90 %			
		S2.67	On-time to resolve	Percentage of service requests responded to <u>within cycle time</u>			Minimum 80 %			
		S2.68	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt			
		S2.69	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle			
		S2.70	Volume of enquiries	Number of queries sent per time period indicated			No benchmark			

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
		Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)					
Standards KPIs	Inbound Mngt Practice - System availability	S2.71	Uptime	The percentage of total time that the systems are up and available to transact optimally (slow or hanging systems are not deemed to be optimal)		Minimum 98 %				
Standards K	Inbound Mngt Practice - Quality assessment criteria alignment	S2.72	Critical errors	Quality assessment criteria aligned to customer expectations and business requirements		Maximum 3 %				
		S2.73	Non-critical errors	Quality assessment criteria aligned to customer expectations and business requirements		Maximum 5 %				
Standards KPIs	Inbound Mngt Practice - Client Satisfaction	S2.74	Client Satisfaction	A client satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)		Minimum 80 % of top two boxes on a Lickert scale of 1 to 5				
		S2.75	Ratio of complaints to contacts	Any negative feedback or comments shall be classified as complaints. All complaints shall be captured – not just the ones that are escalated to management. This volume of complaints shall be expressed as a percentage of client interactions handled to assess customer experience and root causes of the complaints.		Client-specific target				
Standards KPIs	Inbound Mngt Practice - Customer Satisfaction	S2.76	Customer Satisfaction	A customer satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)		Minimum 80 % of top two boxes on a Lickert scale of 1 to 5				
		S2.77	Ratio of complaints to contacts	Ratio of customer complaints to the number of times customers call in a month. This will serve to facilitate the process issues and dependency issues that cause customer complaints.		Client-specific target				
Standards KPIs	Inbound Mngt Practice - Staff satisfaction	S2.78	Staff satisfaction	A staff satisfaction survey shall be conducted within the different role categories. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)		Minimum 70 % of top two boxes on a Lickert scale of 1 to 5				
Standards KPIs	Inbound Mngt Practice - Cost of failure	S2.79	Repeat call per customer	Ratio of customers to the number of times they call in a month. This will serve to facilitate the process issues and dependency issues that might cause customer complaints. The contact centre shall calculate the cost to serve and to recover service on a cost-per-minute basis. This will indicate how expensive failure is and will facilitate pricing when quotes of various processes are given to clients		Client-specific target				

					Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)							
Standards KPIs	Inbound Mngt Practice - Staff efficiency	S2.80	Occupancy	Talk time + holding time + after-call work/total time worked – breaks (as a percentage)			Maximum 70 % to 80 %				
		S2.81	Absenteeism	Number of days lost as a percentage of days scheduled reported monthly			Maximum 10 %				
		S2.82	Attrition	Number of staff per role category lost as a percentage of total staff on the floor per role category reported monthly			Maximum 20 % (annualized basis)				
		S2.83	Utilization	(Total talk time + available time + holding time + after-call work + authorized auxiliary time)/staff time , expressed as a percentage			Minimum 80 %				
		S2.84	Average handling time	Average of all agents' talk time + after-call work + holding time			Client-specific target				
Standards KPIs	Back Office - All transaction processes	S3.1	On-time	Percentage of transaction completed within cycle time			Client-specific target				
		S3.2	Backlog	Percentage of transactions not completed in relation to the forecasted number, in order to reach target (how far behind target are you?)			Maximum one overdue cycle				
		S3.3	Volume per transaction process type	Total number of outputs achieved			Client-specific target				
		S3.4	Productivity	Percentage of customer-facing time/staffed time			Minimum 70 %				
		S3.5	Average handling time per transaction process type	Average transaction time for all agents			Client-specific target				
		S3.6	Quality: critical errors	Critical-error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues			Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %				
Standards KPIs	Back Office - All transaction escalations processes	S3.7	On-time	Percentage of escalations handled within cycle time			Client-specific target by process type				
		S3.8	Backlog	Number of overdue cycles			Client-specific target by process type				
		S3.9	Volume	Number of escalations sent			Client-specific target by process type				
		S3.10	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)			Client-specific target by process type				

			Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Standards KPIs	Back Office Mngt Practice - Capacity Planning	S3.11	Productivity	Documented capacity planning process which shall take output targets, transaction time and productive hours per agent into account. Number of transactions required per agent per hour			Maximum 5 % variance above or below forecast		
Standards KPIs	Back Office Mngt Practice- Management of Internal Support Departments	S3.12	On-time to respond/deliver	Percentage of service requests responded to <u>within cycle time</u>			Minimum 85 %		
		S3.13	On-time to resolve	Percentage of service requests completed to <u>within cycle time</u>			Minimum 80 %		
		S3.14	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt		
		S3.15	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle		
Standards KPIs	Back Office Mngt Practice - Management of External Service Suppliers	S3.16	On-time to respond/deliver	Percentage of service requests <u>responded to within cycle time</u>			Minimum 85 %		
		S3.17	On-time to resolve	Percentage of service requests completed within <u>cycle time</u>			Minimum 80 %		
		S3.18	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt		
		S3.19	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle		
Standards KPIs	Back Office Mngt Practice - Facilities Management	S3.20	On-time to respond/deliver	Percentage of service requests <u>responded to within cycle time</u>			Minimum 85 %		
		S3.21	On-time to resolve	Percentage of service requests completed within <u>cycle time</u>			Minimum 80 %		
		S3.22	Response/delivery backlog	Accuracy rate = 1 – rework rate (express result as a percentage)			Maximum one overdue cycle		
		S3.23	Quality of resolution	Number of overdue cycles (how far behind target are you?)			Minimum 80 % resolved on first attempt		
Standards KPIs	Back Office Mngt Practice - Mngt of technical support	S3.24	On-time to respond/deliver	Percentage of service requests responded to <u>within cycle time</u>			Minimum 90 %		
		S3.25	On-time to resolve	Percentage of service requests completed within <u>cycle time</u>			Minimum 80 %		
		S3.26	Response/delivery backlog	Accuracy rate = 1 – rework rate (express result as a percentage)			Maximum one overdue cycle		
		S3.27	Quality of resolution	Number of overdue cycles (how far behind target are you?)			Minimum 80 % resolved on first attempt		
		S3.28	Volume of enquiries	Number of queries sent per time period indicated			No benchmark		

					Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)							
Standards KPIs	Back Office Mngt Practice - System availability	S3.29	Uptime	The percentage of total time that the systems are up and available to transact optimally (slow or hanging systems are not deemed to be optimal)			Minimum 98 %				
Standards KPIs	Back Office Mngt Practice - Client Satisfaction	S3.30	Client Satisfaction	A client satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 80 % of top two boxes on a Lickert scale of 1 to 5				
		S3.31	Ratio of complaints to contacts	Anything negative shall be classified as a complaint. All complaints shall be captured, not only the ones that are escalated to management. This volume of complaints shall be expressed as a percentage of interactions handled to assess customer experience and root causes.			Client-specific target				
Standards KPIs	Back Office Mngt Practice - Staff satisfaction	S3.32	Staff satisfaction	A staff satisfaction survey shall be conducted in accordance with their role categories. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 70 % of top two boxes on a Lickert scale of 1 to 5				
Standards KPIs	Back Office Mngt Practice - Cost of failure	S3.33	Repeat ratio per type of process	Ratio of customers to the number of times they call in a month. This will serve to facilitate the process issues and dependency issues that might cause customer complaints. The contact centre shall calculate the cost to serve and to recover service on a cost-per-minute basis. This will indicate how expensive failure is and will facilitate pricing when quotes of various processes are given to clients			Client-specific target				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
Standards KPIs	Back Office Mngt Practice - Staff efficiency	S3.34	Occupancy	Interaction/staff time – breaks (expressed as a percentage)		Maximum 70 % to 80 %				
		S3.35	Absenteeism	Number of days lost as a percentage of days scheduled monthly		Maximum 10 %				
		S3.36	Attrition	Number of heads lost as a percentage of total head count on the floor per role category monthly, annualized		Maximum 20 % (annualized basis)				
		S3.37	Utilization	Interaction time + authorized auxiliary time/staffed time, expressed as a percentage		Minimum 80 %				
		S3.38	Average handling time	Average handling time of interaction type for agents handling that type of transaction		Client-specific target				
C3 Africa Measures	Fundamental Operational KPIs	1.1	Average Speed To Answer / Queue Time		26 sec	21 sec				
		1.2	Service Level (Calls answered in under 20 seconds)		82%	80%	Company specific but 80% considered best practice			
		1.3	Calls Abandoned	The percentage of callers who hang up before their call is answered by an agent or before they make a selection in the IVR	12%		<5%			
		1.4	First Call Resolution (resolved by initial agent)	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call	68%	74%				
		1.5	Calls Transferred							
		1.6	Talk Time - Inbound (Average) Financial Services	The time an agent spends with a caller during a transaction. Including everything from 'hello' to 'goodbye'	4 mins	4 mins	Company Specific			
		1.7	Talk Time - Outbound (Average) Financial Services	The time an agent spends with a caller during a transaction. Including everything from 'hello' to 'goodbye'	4 mins	4 mins	Company specific			
		1.8	Average after call time (duration) Financial Services	Also called Wrap-Up and Post Call Processing (PCP). Average time spent on work that is necessitated by and immediately follows an inbound/outbound transaction. This includes data capture, filling out forms, making additional outbound calls to complete transaction. The agent is unavailable to receive another call while in this mode	4 mins	4 mins	Company Specific			
		1.9	Overall Agent Occupancy / Utilization / Productivity	The percentage of time agents handle calls versus wait for calls to arrive. For a half-hour, the calculation - call volume X average handling time in seconds/number of agents X 1800 seconds	70%	69%	70%-80%			
		1.10	Agent productivity - Outbound calling	Time spent on actual work conducted i.e. talking; after call work. Does not include idle time where an agent is waiting for calls to arrive	46%	67%	65%			
		1.11	Agent Idle Time	Agents waiting for calls to arrive to handle	15%	15%				
		1.12	Returned Calls / Follow-up calls	Additional outbound calls made to resolve problems; handle queries for customer satisfaction	46%	67%	Company Specific			
		1.13	Customer Satisfaction (Satisfied and Highly Satisfied)	Customer satisfaction, a business term, is a measure of how products and services supplied by a company meet or surpass customer expectation. It is seen as a key performance indicator within business and is part of the four perspectives of a Balanced Scorecard. In a competitive marketplace where businesses compete for customers, customer satisfaction is seen as a key differentiator and increasingly has become a key element of business strategy	80%	82%				

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
	1.14	Call Quality	Call quality should be measured through routine call observations of agents by a trained and qualified quality assurance (QA) assessor using a quality assurance form, like a scoring sheet with an appropriate view and weighting of key call characteristics or KPI's to ensure the correct information is imparted and that appropriate soft skills are being used to retain the customer and improve on levels of customer satisfaction.. Depending on the nature of the calls, a number of factors will be considered which are pertinent to the business at hand	80%	80%	Critical accuracy 97% Non Critical accuracy 95%				
	1.15	Agent Utilization		66%	59%	8-%				
	1.16	Staff Attrition	The annual average number of staff that leave an organization as a percentage of the total staff complement (number of staff). This can be calculated for the organization as a whole or for a particular role. Attrition should be broken down into positive (internal moves or promotion) and negative (resignations, dismissals etc) attrition.	32%	32%	20% p.a.				
	1.17	Staff absenteeism	The average number of days absent from work as a percentage of the total number of days available for work. (Available days excludes public holidays and scheduled annual leave)	15%	8%	10%				
	1.18	Technical Systems Uptime	Total time that the systems are up and available to transact optimally (slow or hanging systems are not deemed to be optimal)	9,80%	99,80%					

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
C3 Africa Response Times	Response Times	2.1	Time to resolve calls not resolved in first call (normal hours)		6 Hrs	1 Hr				
		2.2	Time to resolve calls not resolved in first call (from message – after hours)		17 Hrs	4 Hrs				
		2.3	Lapsed time from customer leaving a message to first attempt to re-contact	Measurement of time taken to contact customer after a message was left	16 Hrs	9 Hrs				
		2.4	Lapsed time from customer leaving a message to successful contact	Measurement of time taken to contact customer after a message was left and that contact with the correct person was made	23 Hrs	9 Hrs				
		2.5	SMS Response		23 Hrs	9 Hrs				
		2.6	Lapsed time to reply to Fax	Measurement of time taken to reply to customer's fax enquiry	23 Hrs	9 Hrs	up to 1 cycle late			
		2.7	Lapsed time to reply to eMail	Measurement of time taken to reply to customer's e-mail enquiry	19 Hrs	25 Hrs				
C3 Africa - Call Types	Inbound Call Types / Classification	3.1	Average Monthly Incoming calls	The total number of calls offered divided by the number of trading days per month	n/a	n/a				
		3.2	Complaints	a complaint is an expression of displeasure, such as poor service, non-delivery, unsuccessful or inconclusive results of as customer's expectation						
		3.3	Finance	Finance is the set of activities dealing with the management of funds. It is the decision of collection and use of funds. It is a branch of economics that studies the management of money and other assets						
		3.4	Service Enquiry							
		3.5	Insurance	Insurance is a form of risk management primarily used to hedge against the risk of a contingent loss. Insurance is defined as the equitable transfer of the risk of a loss, from one entity to another, in exchange for a premium						
		3.6	Log Request							
		3.7	Message Taking	A process whereby a template with certain identified information is completed to ensure the correct message is recorded for customer purposes						
		3.8	Outbound (Unclassified)	Calls made out for reasons which have not been classified within the Systems Application in use. These generally are put into an "Unclassified" bin						
		3.9	Trading	The buying and selling of goods and services						

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
C3 Africa Measure	Outbound Call Types	4.1	Average Outbound Calls	The total number of call made during a period divided by the number of hours per day to obtain a daily average, or the number of days trading to realize the average number of outgoing calls made for a variety of services/needs						
		4.2	Administration	The performance or management of performance operations. A process of ensuring the business operations has administrative support						
		4.3	Finance	Finance is the set of activities dealing with the management of funds. It is the decision of collection and use of funds. It is a branch of economics that studies the management of money and other assets						
		4.4	ICU							
		4.5	Traders							
C3 Africa Measure	Calls Summary	5.1	Incoming Calls	A call center may handle either outbound or inbound calls exclusively or might deal with a combination of the two. Inbound call centres use different metrics, such as first call resolution (FCR)						
		5.2	Outbound calls	An outbound call centre is one in which call centre agents make outbound calls to customers on behalf of a business or client. Calls made from the centre can include telemarketing, sales or fund-raising calls, as well as calls for contact list updating, surveys or verification services. An outbound call centre uses distinct metrics to measure agent success, such as cost per call, revenue earned, total calls made and tasks completed						
		5.3	Total Calls Processed	The total number of calls logged, escalated, and resolved over a period of time						
C3 Africa Measure	Call Quality Monitoring	6.1	Inbound calls monitored	The number of inbound calls per agent, which have been monitored for quality purposes						
		6.2	Outbound Calls Monitored	The number of outbound calls per agent, which have been monitored for quality purposes						
		6.3								
		6.4								

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
Merchants Global Contact Centre Benchmark	Operational and Tactical KPIs	7.1 % of Calls Answered	A percentage of calls actually answered in time increments of 30 minutes. This is to measure trends and call duration for the particular service at the time							
		7.2 % of Calls Abandoned	Percentage of callers who hang up before their call is answered by an agent or before making a selection in the IVR							
		7.3 Number of calls accepted or handled (excluding calls blocked)	The number of call handled by an agent; a group of agents; or the total inbound call centre							
		7.4 Agent Absenteeism	The average number of days absent from work as a percentage of the total number of days available for work. (Available days excludes public holidays and scheduled annual leave)							
		7.5 Number of Calls offered (including calls blocked)								
		7.6 Call duration / wrap up time								
		7.7 Agent attrition rate	Rate of agent attrition (positive and negative) based on a predefined time period - usually measured annually.							
		7.8 Agent call handling capacity per day	The total time an agent spent on all activities of call handling. The number of hours logged in and transactional time occupied							
		7.9 Agent schedule adherence								
		7.10 Quality / Error rates								
		7.11 Agent utilization rate								
		7.12 Resolution rates on first call	A customer enquiry or transaction that is resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.							
		7.13 Email turnaround time								
		7.14 Capacity forecasting accuracy								
		7.15 Process adherence								
		7.16 Interaction volume forecast accuracy								
		7.17 Agent email handling capacity per day								

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Operational and Tactical KPIs	7.18	No. of outbound calls (service)								
	7.19	% of calls handled through self-service channel								
	7.20	Callback response time								
	7.21	No. of outbound calls (sales)								
	7.22	Letter turnaround time								
	7.23	% of sales opportunities identified through inbound service calls								
	7.24	Agent letter handling capacity per day								
	7.25	Leads / appointments generated from outbound campaigns								
	7.26	No. of interactions per customer per annum.	The total number of times a customer interacted with the call centre. This could be any and all interactions which took place during a 12 month period i.e. calls, SMS, web, e-mail, post, fax							
Merchants Global Contact Centre Benchmark	Fundamental KPI's - 2008!!!	7.1	Customer satisfaction (% measured in the contact centre)	Measured specifically for the contact centre to understand the services available to customers.	> 85%					
		7.2	First contact resolution rate (% of calls resolved first time)	Metric that addresses customers' needs, as well as internal efficiency and productivity requirements.	> 80%					
		7.3	Agent utilization (% talk time)	Metric that focuses on managing staff capacity, defined for the APS as agent "talk-time". This is a critical indicator of management's ability to appropriately plan and manage their resources.	60%					
		7.4	Staff Attrition (% annual agent turnover)	Indication of staff turnover within the contact centre. A critical indicator of management and HR effectiveness.	< 10%					
		7.5	Staff Retention Rate		90%					
		7.6	Staff Absenteeism (% annual agent absenteeism)	Indication of employees' unplanned for absence and an often unaccounted for, but large direct and indirect cost to the organization.	< 5%					
		7.7	Abandoned call rate (% calls abandoned)	Indication of an organization's service levels in response to customers' calls; and their ability to effectively apply routing and channel strategies to meet volume demands.	< 5%					
		7.8	Speed-to-answer (% calls answered in 10 seconds)	Indication of an organization's service levels in response to customers' calls; and their ability to effectively resource to meet volume demands.	90% in 10 seconds					
		7.9	Cost per productive hour (average USD range across regions)	The Cost per Productive Hour (CPPH)[1] is the commercial metric used to assess the real cost of providing a specific service. This is defined as the average cost per FTE per productive hour in the contact centre.						

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
		7.10	Cost per productive hour (overall average USD)	The Cost per Productive Hour (CPPH)[1] is the commercial metric used to assess the real cost of providing a specific service. This is defined as the average cost per FTE per productive hour in the contact centre.						
		7.11	Staff Attendance	95%						
		7.12	Answer Rate	95%						
Merchants Global Contact Centre Benchmark	Sales Success by Contact Purpose KPIs	7.1	Customer Complaints			90.5				
		7.2	Customer Satisfaction							
		7.3	Resolution rate	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.						
		7.4	Capacity							
		7.5	Contacts per channel							
		7.6	Customer expectations and perceptions							
		7.7	Calls per customer							
		7.8	Self-service usage							
		7.9	Number of customers							
		7.10	Cost reduction							
		7.11	Customer retention / attrition	Percentage of customers retained or lost over a predefined period of time.						
		7.12	Number of sales opportunities identified per customer contact							
		7.13	Cost of service per customer segment	The total cost incurred in providing a product or service to the end customer or user.						
		7.14	Revenue per customer							
		7.15	Cost per sale							
		7.16	Prospect of customer conversion rates							
		7.17	Number of products per customer							
		7.18	Customer referrals							
		7.19	Customer profitability							
		7.20	Lapsed customer rate							
		7.21	Annual customer value							
		7.22	Customer share							
		7.23	Market share							
		7.24	Customer lifetime value (CLV)							
		7.25	Customer equity							
Section 8	Presentations Metrics Typical KPIs - Efficiency	8.1	Gross Call Volume							
		8.2	Wait Time (to connect)							
		8.3	Call Queue Time							
		8.4	Calls Abandoned Rate							
		8.5	Average Handling Time (by call type)							
		8.6	Calls per Agent/hour							
		8.7	Service Level							
		8.8	Customer Satisfaction							
		8.9	Cost per call							
		8.10	Schedule Adherence							
		8.11	Errors & Rework							
		8.12	Average Call Value							
		8.13	Sales per hour							

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Section 9	Presentations Metrics Typical KPIs - Effectiveness	9.1	First Call Resolution	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call			95%			
		9.2	Customer Satisfaction				90%			
		9.3	Call Quality				90%			
		9.4	Product Knowledge				95%			
		9.5	Customer Retention				85%			
		9.6	Service Level				80%			
		9.7	Schedule Adherence				95%			
		9.8	Forecasting Accuracy				90%			
Outbound Industry Expert - MM	Outbound Sales Metrics	10.1	Number of sales per agent							
		10.2	Total login hours							
		10.3	Number of sales per hour							
		10.4	Number of sales per agent per day							
		10.5	Absenteeism	The average number of days absent from work as a percentage of the total number of days available for work. (Available days excludes public holidays and scheduled annual leave)						
		10.6	Attrition	The annual average number of staff that leave an organization as a percentage of the total staff complement (number of staff). This can be calculated for the organization as a whole or for a particular role. Attrition should be broken down into positive (internal moves or promotion) and negative (resignations, dismissals etc) attrition.						
		10.7	Time spent on total sales for the week							
		10.8	Total average conversion							
		10.9	Overtime %							
		10.10	Marathons run							
		10.11	Dataset stats - number of records received; number of usable records; number of records returned; analysis of records used							

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Section 11	KPIs as defined by CC Centre Mngt on Fast Frwd - Quality	11.1	Call (Contact) Quality (QA)							
		11.2	First Call (First Contact) Resolution	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call						
		11.3	Errors and Rework	Defective transactions or the number of defective steps within a transaction which has been identified and where repeat work (rework) is required. This increases the cost of the original transaction due to rework						
Section 12	KPIs as defined by CC Centre Mngt on Fast Frwd - Accessibility	12.1	Contacts by Channel							
		12.2	Service Level and Response Time	Service Level is the percentage of incoming calls which are answered within a specific threshold. "X% of calls answered in Y seconds". Response Time is the time it takes the call centre to respond to transactions that do not have to be handled when they arrive. e.g. correspondence or e-mail						
		12.3	Average Speed of Answer (ASA)	Also called Average Delay. The average delay of all calls. It is total Delay divided by total number of calls						
		12.4	Abandoned & Blocked Calls	Abandoned Call is when the caller hangs up before reaching an agent. Blocked call is a call that cannot be connected immediately because a) no circuit is available at the time the call arrives or b) the ACD is programmed to block calls from entering the queue when the queue backs up beyond a defined threshold						
		12.5	Longest Delay (Oldest Call)							

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure		Description of performance metric		Industry Best Practice (Africa)	Industry Best Practice (UK)					
Section 13	KPIs as defined by CC Centre Mngt on Fast Frwd - Efficiency	13.1	Forecast accuracy							
		13.2	Scheduled Staff vs. Actual	Number of staff scheduled for a particular shift to handle calls versus actual attendance at work and log in times						
		13.3	Adherence to schedule	Schedule Adherence is a measurement of how much time an agent spends on a call, wrapping up a call or available to take a call during his shift. In the simplest form, the calculation is: (Talk Time + After Call Work + Available Time)/Shift Time. Time for planned non-phone activities must also be taken into account such as training, team meetings, QA feedback and						
		13.4	Average handling time (AHT)	The sum of Average Talk Time and Average After Call Work for a specified time period						
		13.5	Occupancy, contacts handled, normalized contacts handled							
		13.6	Transferred or escalated calls							
Section 14	KPIs as defined by CC Centre Mngt on Fast Frwd - Cost Performance	14.1	Cost per Call (cost per contact)	Total costs (fixed and variable) divided by total calls for a given period of time						
		14.2	Average (Contact) Call value							
		14.3	Revenue							
		14.4	Budgeted to actual expenditures							
		14.5	Objectives for outbound	An outbound call centre is one in which call centre agents make outbound calls to customers on behalf of a business or client. Calls made from the centre can include telemarketing, sales or fund-raising calls, as well as calls for contact list updating, surveys or verification services						
Section 15	KPIs as defined by CC Centre Mngt on Fast Frwd - Strategic Impact	15.1	Customer satisfaction and loyalty	The level of satisfaction which a customer receives and is happy with and will stay with their current supplier and not change to an alternative provider of goods or services						
		15.2	Employee satisfaction	The degree of satisfaction received by the employees of a company. The reasons why employees stay at their employer. Intrinsic value is often determined by this study						
		15.3	Turnover	The amount of money taken by a business in a particular period or time.						
		15.4	Strategic value							

				Dimension Data / Merchants		SABS Standards	Rod Jones recommended Best Practice: Phase 1	Rod Jones recommended Best Practice: Phase 2	Client or User Metric #1	Client or User Metric #2
Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)							
Section 17	Additions	17.1 Training Attrition (specifically for operations where passing of preliminary and final assessment is a prerequisite of employment)	The percentage of agents lost to an organization or department due to failing / being found not yet competent according to internal / client required benchmarks							
		17.2 Staffing Agency Recruitment % vs. required (agencies should be measured on their ability to supply quality candidates to client)	The percentage of staff provided by recruitment agencies to sites/projects against a predetermined target as set by the client. I.e.. 20 staff required for new training intake, only 10 are provided by recruitment company therefore 50% hit rate by agency							
		17.3 Financial Turnover	Percentage of budget (below, met or exceeded)							
		17.4 Strategic value								

Performance Metrics & KPIs

NOTE: 'Industry Best Practice' refers to Vertical market segment and is referenced by the Dimension Data / Merchants Benchmarking report.

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
1	% of Calls Abandoned	Percentage of callers who hang up before their call is answered by an agent or before making a selection in the IVR					
2	% of calls handled through self-service channel						
3	% of sales opportunities identified through inbound service calls						
4	Abandoned & Blocked Calls	The percentage of callers who hang up before their call is answered by an agent or before they make a selection in the IVR					
5	Abandoned call rate (% calls abandoned)	Indication of an organisation's service levels in response to customers' calls; and their ability to effectively apply routing and channel strategies to meet volume demands.	< 5%				
6	Abandonment rate (for predictive dialler)	Percentage of calls dropped by customers before being routed to an agent			Maximum 5 %		
7	Abandonment rate	The percentage of calls offered that are dropped by the caller	< 5%		Client-specific target/maximum 5 %		
8	Absenteeism	Number of days lost as a percentage of days scheduled monthly	< 5%		Maximum 10 %		
9	Adherence to schedule						
10	Administration						
11	Agent attrition rate	Rate of agent attrition (positive and negative) based on a predefined time period - usually measured annually.	< 10%				
12	Agent call handling capacity per day						
13	Agent email handling capacity per day						
14	Agent Idle Time		15%	15%			
15	Agent letter handling capacity per day						
16	Agent productivity - Outbound calling		46%	67%	65%		
17	Agent schedule adherence						

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
18	Agent utilisation (% talk time)	Metric that focuses on managing staff capacity, defined for the APS as agent "talk-time". This is a critical indicator of management's ability to appropriately plan and manage their resources.	60%				
19	Agent utilisation rate						
20	Agent Utilization		66%	59%	8-%		
21	Annual customer value						
22	Arrival patterns / Forecast Accuracy	Arrival patterns shall be tracked at 30 min intervals for voice contacts and at cycle intervals for non-voice contacts. Documented capacity planning process which shall take service level, average handling time and volume into account (using an Erlang C model to calculate the number of agents required for inbound calls) Percentage of variance between actual call arrival and call arrival forecast			Maximum 5 % variance above or below forecast		
23	Attrition	Number of staff per role category lost as a percentage of total staff on the floor per role category	< 10%		Maximum 20 % (annualized basis)		
24	Attrition	Number of heads lost as a percentage of total head count on the floor per role category monthly, annualized	< 10%		Maximum 20 % (annualized basis)		
25	Average (Contact) Call value						
26	Average after call time (duration) Financial Services		4 mins	4 mins	Company Specific		
27	Average Call Value						
28	AHT - Average Handling Time	Average of the sum of (talk time + after-call work + holding time) for agents			Client-specific target		
29	AHT - Average Handling Time	Average time worked on an electronic interaction			Client-specific target by enquiry type		
30	AHT - Average Handling Time	Average electronic interaction handling time			Client-specific target by enquiry type		
31	AHT - Average Handling Time	Average electronic interaction handling time			Client-specific target		
32	AHT - Average Handling Time	Average handling time of interaction type for agents handling that type of transaction			Client-specific target		
33	Answer Rate		95%				
34	Average Handling Time (by call type)						
35	Average handling time per transaction process type	Average transaction time for all agents			Client-specific target		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
36	Average Monthly Incoming calls		n/a	n/a			
37	Average Outbound Calls						
38	Average Speed of Answer (ASA)						
39	Average Speed To Answer / Queue Time		26 sec	21 sec			
40	Backlog	Number of overdue cycles			Client-specific target by enquiry type		
41	Backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle		
42	Backlog	Percentage of transactions not completed in relation to the forecasted number, in order to reach target (how far behind target are you?)			Maximum one overdue cycle		
43	Budgeted to actual expenditures						
44	Call duration / wrap up time						
45	Call Quality		80%	80%	Critical accuracy 97% Non Critical accuracy 95%		
46	Call Queue Time						
47	Callback response time						
48	Calls Abandoned	The percentage of callers who hang up before their call is answered by an agent or before they make a selection in the IVR	Average abandoned rates reported in 2006/7 dimension Data Benchmark 12%		<5%		
49	Calls Abandoned Rate						
50	Calls per Agent/hour						
51	Calls per customer						
52	Calls Transferred						
53	Capacity						
54	Capacity forecasting accuracy						
55	Client Satisfaction	Number of overdue cycles (how far behind target are you?)			Minimum 80 % of top two boxes on a Lickert scale of 1 to 5		
56	Client Satisfaction	A client satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 80 % of top two boxes on a Lickert scale of 1 to 5		
57	Complaints						
58	Contacts by Channel						

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
59	Cost of service per customer segment	The total cost incurred in providing a product or service to the end customer or user.					
60	Cost per call						
61	Cost per Call (cost per contact)						
62	Cost per productive hour (average USD range across regions)	The Cost per Productive Hour (CPPH)[1] is the commercial metric used to assess the real cost of providing a specific service. This is defined as the average cost per FTE per productive hour in the contact centre.					
63	Cost per productive hour (overall average USD)	The Cost per Productive Hour (CPPH)[1] is the commercial metric used to assess the real cost of providing a specific service. This is defined as the average cost per FTE per productive hour in the contact centre.					
64	Cost per sale						
65	Cost reduction						
66	Critical errors	Quality assessment criteria aligned to customer expectations and business requirements			Maximum 3 %		
67	Customer Complaints				90,5		
68	Customer equity						
69	Customer expectations and perceptions						
70	Customer lifetime value (CLV)						
71	Customer profitability						85%
72	Customer referrals						
73	Customer Retention						
74	Customer retention / attrition	Percentage of customers retained or lost over a predefined period of time.					90%
75	Customer Satisfaction	A customer satisfaction survey shall be conducted. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 80 % of top two boxes on a Lickert scale of 1 to 5		
76	Customer Satisfaction		> 85%				
77	Customer Satisfaction (Satisfied and Highly Satisfied)		80%	82%			
78	Customer satisfaction (% measured in the contact centre)	Measured specifically for the contact centre to understand the services available to customers.	> 85%				
79	Customer satisfaction and loyalty						
80	Customer share						

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
81	Dataset stats - number of records received; number of usable records; number of records returned; analysis of records used						
82	Email turnaround time						
83	Employee satisfaction						
84	Errors and Rework						
85	Finance						95%
86	Financial Turnover	Percentage of budget (below, met or exceeded)					
87	First Call Resolution	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.					
88	First Call Resolution (resolved by initial agent)	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.	68%	74%			
89	First contact resolution rate (% of calls resolved first time)	Metric that addresses customers' needs, as well as internal efficiency and productivity requirements.	> 80%				
90	Forecast accuracy	Percentage of variance between actual call arrival and call arrival forecast			Maximum 10 % variance		
91	Forecasting Accuracy						
92	Gross Call Volume						
93	ICU						
94	Inbound calls monitored (CQM)						
95	Incoming Calls						
96	Insurance						
97	Interaction volume forecast accuracy						
98	Lapsed customer rate						
99	Lapsed time from customer leaving a message to first attempt to re-contact		16 Hrs	9 Hrs			
100	Lapsed time from customer leaving a message to successful contact		23 Hrs	9 Hrs			
101	Lapsed time to reply to eMail		19 Hrs	25 Hrs			
102	Lapsed time to reply to Fax		23 Hrs	9 Hrs	up to 1 cycle late		
103	Leads / appointments generated from outbound campaigns						
104	Letter turnaround time						

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
105	List Backlog	Percentage of records not used in relation to forecast – in order to reach target			Maximum one overdue cycle		
106	List backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle		
107	Log Request						
108	Longest Delay (Oldest Call)						
109	Marathons run						
110	Market share						
111	Message Taking						
112	No. of interactions per customer per annum.						
113	No. of outbound calls (sales)						
114	No. of outbound calls (service)						
115	Non-critical errors	Quality assessment criteria aligned to customer expectations and business requirements			Maximum 5 %		
116	Number of calls accepted or handled (excluding calls blocked)						
117	Number of Calls offered (including calls blocked)						
118	Number of customers						
119	Number of products per customer						
120	Number of sales opportunities identified per customer contact						
121	Number of sales per agent						
122	Number of sales per agent per day						
123	Number of sales per hour						
124	Objectives for outbound						
125	Occupancy	Talk time + holding time + after-call work/total time worked – breaks (as a percentage)			Maximum 70 % to 80 %		
126	Occupancy	Talk time + holding time + after-call work / staff time – breaks, expressed as a percentage for agents			Maximum 70 % to 80 %		
127	Occupancy	Interaction/staff time – breaks (expressed as a percentage)			Maximum 70 % to 80 %		
128	Occupancy, contacts handled, normalized contacts handled						
129	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time			Client-specific target by enquiry type		
130	On-time	Number of outputs required – per agent – per hour			Maximum 5 % variance above or below forecast		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
131	On-time	Percentage of escalations handled within cycle time			Client-specific target by enquiry type		
132	On-time	Percentage of electronic interactions (e-mail or fax) completed within cycle time			Client-specific target		
133	On-time to resolve	Number of queries sent per time period indicated			Minimum 80 %		
134	On-time to resolve	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 %		
135	On-time to respond/deliver	Number of queries sent per time period indicated			Minimum 85 %		
136	On-time to respond/deliver	Number of overdue cycles (how far behind target are you?)			Minimum 85 %		
137	On-time to respond/deliver	Percentage of service requests completed within cycle time			Minimum 90 %		
138	On-time to respond/deliver	Percentage of service requests responded to within cycle time			Minimum 90 %		
139	On-time. Backlog. Quality.	Monitoring access to call records - Percentage of service requests completed within cycle time			Daily / Monthly		
140	Outbound (Unclassified)						
141	Outbound calls						
142	Outbound Calls Monitored (CQM)						
143	Overall Agent Occupancy / Utilization / Productivity		70%	69%	70%-80%		
144	Overtime %						95%
145	Process adherence						
146	Product Knowledge						
147	Productivity	Percentage of customer-facing time/total time worked			Minimum 65 %		
148	Productivity	Percentage of customer-facing time/staffed time			Minimum 70 %		
149	Productivity	Documented capacity planning process which shall take output targets, transaction time and productive hours per agent into account. Number of transactions required per agent per hour			Maximum 5 % variance above or below forecast		
150	Prospect of customer conversion rates						
151	Quality	Critical error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues			Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %		
152	Quality	Accuracy rate = 1 – rework rate (express result as a percentage)			Client-specific target by process type		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
153	Quality / Error rates						
154	Quality of resolution	Percentage of service requests completed within cycle time			Minimum 80 % resolved on first attempt		
155	Quality of resolution	Number of outputs required – per agent – per hour			Minimum 80 % resolved on first attempt		
156	Quality of resolution	Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 80 % resolved on first attempt		
157	Quality of resolution	Number of overdue cycles (how far behind target are you?)			Minimum 80 % resolved on first attempt		
158	Quality: critical errors	Critical-error accuracy – mistakes that put the business at risk Non-critical-error accuracy – mistakes that indicate softer issues			Critical errors: Maximum 3 % Non-critical errors: Maximum 5 %		
159	Ratio of complaints to contacts	Number of queries sent per time period indicated			Client-specific target		
160	Ratio of complaints to contacts	Any negative feedback or comments shall be classified as complaints. All complaints shall be captured – not just the ones that are escalated to management. This volume of complaints shall be expressed as a percentage of client interactions handled to assess customer experience and root causes of the complaints.			Client-specific target		
161	Ratio of complaints to contacts	Ratio of customer complaints to the number of times customers call in a month. This will serve to facilitate the process issues and dependency issues that cause customer complaints.			Client-specific target		
162	Repeat call per customer	Ratio of customers to the number of times they call in a month. This will serve to facilitate the process issues and dependency issues that might cause customer complaints. The contact centre shall calculate the cost to serve and to recover service on a cost-per-minute basis. This will indicate how expensive failure is and will facilitate pricing when quotes of various processes are given to clients			Client-specific target		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
163	Repeat ratio per type of process	Ratio of customers to the number of times they call in a month. This will serve to facilitate the process issues and dependency issues that might cause customer complaints. The contact centre shall calculate the cost to serve and to recover service on a cost-per-minute basis. This will indicate how expensive failure is and will facilitate pricing when quotes of various processes are given to clients			Client-specific target		
164	Resolution rate	The percentage of customer enquiries or transactions that are resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.					
165	Resolution rates on first call	A customer enquiry or transaction that is resolved or completed to the satisfaction of the customer by the initial agent or any resource that the call has been escalated to within the first call.					
166	Response/delivery backlog	Percentage of service requests responded to within cycle time			Maximum one overdue cycle		
167	Response/delivery backlog	Number of queries sent per time period indicated			Maximum one overdue cycle		
168	Response/delivery backlog	Number of overdue cycles (how far behind target are you?)			Maximum one overdue cycle		
169	Response/delivery backlog	Accuracy rate = 1 – rework rate (express result as a percentage)			Maximum one overdue cycle		
170	Returned Calls / Follow-up calls		46%	67%	Company Specific		
171	Revenue						
172	Revenue per customer						95%
173	Sales per hour						
174	Schedule Adherence						
175	Scheduled Staff vs Actual						
176	Self-service usage						80%
177	Service Enquiry						
178	Service Level						
179	Service Level (Calls answered in under 20 seconds)		82%	80%	Company specific but 80% considered best practice		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
180	Service Level and Response Time						
181	Service level/on-time	The percentage of total calls offered to the skills group that are answered by an agent before the threshold time, e.g. 90/20 indicates that 90 % of calls offered shall be answered within 20 s			Client-specific target		
182	SMS Response		23 Hrs	9 Hrs			
183	Speed-to-answer (% calls answered in 10 seconds)	Indication of an organisation's service levels in response to customers' calls; and their ability to effectively resource to meet volume demands.	90% in 10 seconds				
184	Staff absenteeism	The average number of days absent from work as a percentage of the total number of days available for work. (Available days excludes public holidays and scheduled annual leave)	15%	8%	10%		
185	Staff Absenteeism (% annual agent absenteeism)	Indication of employees' unplanned for absence and an often unaccounted for, but large direct and indirect cost to the organisation.	< 5%				
186	Staff Attendance		95%				
187	Staff Attrition	The annual average number of staff that leave an organisation as a percentage of the total staff complement (number of staff). This can be calculated for the organisation as a whole or for a particular role. Attrition should be broken down into positive (internal moves or promotion) and negative (resignations, dismissals etc) attrition.	32%	32%	20% p.a.		
188	Staff Attrition (% annual agent turnover)	Indication of staff turnover within the contact centre. A critical indicator of management and HR effectiveness.	< 10%				
189	Staff Retention Rate		90%				
190	Staff satisfaction	A staff satisfaction survey shall be conducted in accordance with their role categories. Scores shall be determined by means of a Lickert scale of 1 to 5. (Benchmark = 80 % of top two boxes)			Minimum 70 % of top two boxes on a Lickert scale of 1 to 5		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
191	Staffing Agency Recruitment % vs required (agencies should be measured on their ability to supply quality candidates to client)	The percentage of staff provided by recruitment agencies to sites / projects against a predetermined target as set by the client. Ie. 20 staff required for new training intake, only 10 are provided by recruitment company therefor 50% hit rate by agency.					
192	Strategic value						
193	System availability	Tracking of all key systems that impact on service delivery. Accuracy rate = 1 – rework rate (express result as a percentage)			Minimum 98 %		
194	Talk Time - Inbound (Average) Financial Services		4 mins	4 mins	Company Specific		
195	Talk Time - Outbound (Average) Financial Services		4 mins	4 mins	Company specific		
196	Technical Systems Uptime		9,80%	99,80%			
197	Time spent on total sales for the week						
198	Time to resolve calls not resolved in first call (from message – after hours)		17 Hrs	4 Hrs			
199	Time to resolve calls not resolved in first call (normal hours)		6 Hrs	1 Hr			
200	Total average conversion						
201	Total Calls Processed >>>						
202	Total login hours						
203	Traders						
204	Trading						
205	Training Attrition (specifically for operations where passing of preliminary and final assessment is a prerequisite of employment)	The percentage of agents lost to an organisation or department due to failing / being found not yet competent according to internal / client required benchmarks.					
206	Transferred or escalated calls						
207	Turnover						
208	Uptime	The percentage of total time that the systems are up and available to transact optimally (slow or hanging systems are not deemed to be optimal)			Minimum 98 %		
209	Utilization	Interaction time as a percentage of total time worked less breaks			Minimum 80 %		
210	Utilization	Interaction time as a percentage of staffed time worked less breaks			Minimum 80 %		
211	Utilization	(Total talk time + available time + holding time + after-call work + authorized auxiliary time)/staff time , expressed as a percentage			Minimum 80 %		

No.	Baseline Measure	Description of performance metric	Industry Best Practice (Africa)	Industry Best Practice (UK)	SA Standard	Rod Jones Recommended	Other
212	Utilization	Interaction time + authorized auxiliary time/staffed time, expressed as a percentage			Minimum 80 %		
213	Volume	Total number of outputs achieved			Client Specific Target		
214	Volume	Number of escalations sent			Client-specific target by enquiry type		
215	Volume	Total number of transactions conducted			Client-specific target by enquiry type		
216	Volume	The number of calls offered to the contact centre			No benchmark		
217	Volume of enquiries	Percentage of service requests responded to within cycle time			No benchmark		
218	Volume of enquiries	Number of queries sent per time period indicated			No benchmark		
219	Volume per transaction process type	Total number of outputs achieved			Client-specific target		
220	Wait Time (to connect)						
221	Yield	Number of outputs required - per agent - per hour			Client Specific Target		
222	Yield	Percentage of escalations handled within cycle time			Client-specific target by enquiry type		