



CONTACT CENTRE MATURITY MODEL

CONTACT CENTRE ASSESSMENT & PERFORMANCE REVIEW

SERVICE DESCRIPTION

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01 ASSESSMENT AND PERFORMANCE REVIEW

IPI understands organisations are constantly investigating methods of driving greater efficiency within the Contact Centre and have a desire to improve Customer Experience and Employee Retention. The IPI **Contact Centre Assessment and Performance Review** will analyse and evaluate to create a common understanding of the current state of our customers Contact Centre Environment to help inform the future state with a focus on five key perspectives.

- Strategy
- Process
- Technology
- People
- Facilities

IPI have a pedigree in the transforming Contact Centre and have demonstratable success in assessment, design, implementation of best practices, process improvement and the deployment of emerging technologies, all against a backdrop of a ROI model.

IPI's team of experienced contact centre consultants help our clients originate, qualify, develop and deliver opportunities to improve their contact centres. IPI reduce operating costs from self-funding improvement initiatives through to complete transformation programmes.

This document provides a description for the IPI **Contact Centre Assessment and Performance Review** that would align the people, processes and technology into an integrated plan to achieve the desired business outcomes.

The programme would begin with a one-week onsite audit and assessment of the Current Operating Model (COM) from which a gap analysis would be performed to determine the broad strategies and tactics that would need to be addressed as part of the Target Operating Model (TOM).

It is envisaged the resultant program would be of one month's duration, employing a multi-skilled team of consultants with the required subject matter expertise for each part of the Target Operating Model development and implementation.

The cost for delivering this body of work will be priced on application.





EXAMPLE REPORT

The purpose of the CCAP report is to highlight the key insights associated with Operational and Technology performance within the contact centre and recommend improvements. The report will demonstrate the inherent customer and employee experience benefit as well as monetising the value impact on operational cost.

IPI's GOAL is to demonstrate how the contact centre can continue to support the customer base and growth without increasing operational costs.

The following pages are taken from an example report and provides a high-level assessment of a contact centre. Results were obtained during a 5 day onsite assessment, which incorporated agent shadowing, success criteria / KPI review and a technology audit, and direct feedback from the senior management team, frontline supervisory staff and customer service agents (Advisors). IPI's consultants utilised a set of criteria to assess the current operating model, agent and customer experience and the technology supporting business operations. The final output of these assessments, Benefit Realisation, identified opportunities to improve operations across critical areas, technology gaps and risks, and recommendations on future aspirations for transformation projects.



SELF ASSESSMENT

This is a survey for contact centre stakeholders to provide internal insight into contact centre focus areas including Process, Technology, People and Facilities



AGENT PERSPECTIVE

Agent shadowing exercise used to observe the day to day tasks of an agent, specifically from a system usage perspective



TECHNOLOGY INPUT

Analysis of deployed technology and utilisation to identify areas for improvement with a view to increasing customer satisfaction and reducing cost



BENEFIT REALISATION

Summary of improvement initiatives that will deliver:

- Reduction of, or control of costs
- Increase in revenue
- Greater customer & employee experience

A man with short brown hair and a light beard is sitting at a desk in an office, looking at a computer monitor. He is wearing white earbuds. In the background, several other people are working at their desks, and a man is standing near a window. The office has large windows with blinds. A blue horizontal bar is at the bottom of the image, containing the text "SELF ASSESSMENT".

SELF ASSESSMENT

SURVEY FORMAT

The self assessment survey will consist of a series of focus areas that stakeholders are asked to evaluate. Each focus area will have a number of statements to be scored on a 1 – 5 scale, with 5 being the highest and 1 being the lowest score. The focus area category and associated questions are listed below. Should a stakeholder not have any information on the question it would receive a rating of a one.

Stakeholders will be divided into 4 focus groups representing sales and service advisors, the support team, team leaders and senior management. The survey questions will be based on contact centre best practices in operational standards.

SCORING

Scores will be collated and interpreted against a range to provide a high level scorecard. The scorecard will show how the customers contact centre is performing overall.

RATING	RANGE	DEFINITION
5	90% - 100%	Excellent
4	80% - 89%	Good
3	70% - 79%	Fair
2	60% - 69%	Poor
1	Below 60%	Failing

CATEGORY QUESTIONS

STRATEGY	<ul style="list-style-type: none"> Our contact centre's strategy is defined and is aligned with our overall business strategy Our contact centre vision and mission is defined and well communicated to all personnel The needs and expectations of our customers are understood fully, and updated over time based on data from our customers The performance goals and objectives of our contact centre are defined and clearly communicated Our overall contact centre strategy is revisited and updated on a regular level (at least yearly)
PROCESSES	<ul style="list-style-type: none"> Our business processes are well documented and up-to-date, (including hiring, training, quality monitoring, workforce & performance management, system maintenance and disaster recovery) We have performance measures assigned to each business process and each customer contact process. Data is collected and analysed on a regular basis to indicate our current performance levels and trends. Continuous process improvement methods are in place We collect customer satisfaction data, and benchmark our performance against competitors and non-competitors in order to set performance goals Our contact routing and contact handling processes are well documented and up-to-date
TECHNOLOGY	<ul style="list-style-type: none"> We have a technology architecture plan for a 1 to 3-year timeframe, including a migration plan for UC, Cloud, and/or IP Technology is used effectively throughout the contact centre to route customers to the right agents, to enable agents to access information easily and quickly, and to gather data on the performance of the contact processes Our technology enables customer to choose their preferred media (voice, email, chat, web, txt, mail, social media) or self-service as an option for interacting with the contact centre Data is easy to extract from our systems and we make effective use of reporting tools to support our performance management processes
PEOPLE	<ul style="list-style-type: none"> Our current organisational design and reporting structure is an enabler for our strategy and processes We have up-to-date role descriptions that clearly outline job responsibilities. Compensation is equitable based on industry comparisons Our hiring and recruiting processes support the contact centre and business strategy and goals. We employ processes and tools, including exit interview, to improve employee retention Manager / Supervisors / Team Leaders help develop career paths and professional development plans and use fair performance evaluations. This process is measured for compliance
FACILITIES	<ul style="list-style-type: none"> The location(s) of the contact centre(s) is/are well suited and meets contact centre's needs in terms of labour availability and access to networking The building(s), furniture, lighting and HVAC provide a comfortable atmosphere for the contact centre employees We have adequate facilities to cover common outages including power black-outs and cut utility lines (network or voice)

The example below provides an illustration of how the Strategy Results are presented back to the customer with the scores and benchmarks compared against industry standards. This graphical representation is also used for the 4 other categories covered in the self assessment process. In all cases IPI will make series of recommendations on where and how the customer can improve immediately and in the mid and long term.

FINDINGS AND CONCLUSIONS

In each of the five assessment categories IPI will provide a synopsis on the information gathered in terms of the current contact centre landscape and how this compares against industry best practices. The customer will receive an exacting statement on the following:

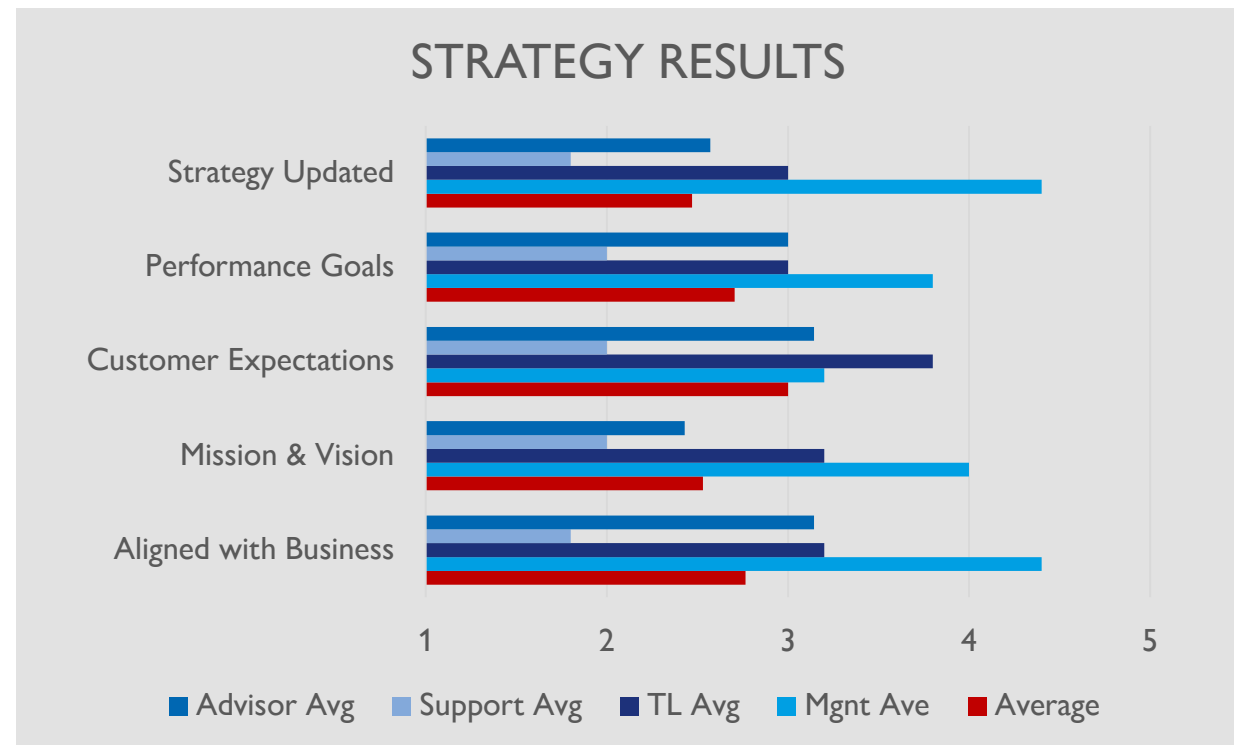
- What was found
- How this was interpreted
- Why this matters

IPI will also capture key statements by the made customers and/or contact centre staff during the Self Assessment. These typically are

- Our contact routing and contact handling processes are well documented and up-to-date.
- We have performance measures assigned to each business process and each customer contact process. Data is collected and for analyses on a regular basis to indicate our current performance levels and trends. Continuous process improvement methods are in place.
- We collect customer satisfaction data and benchmark our performance against competitors and non-competitors in order to set performance goals.

RECOMMENDATIONS

IPI carefully analyse the information captured and use industry best practices to make a series of business based recommendations. These recommendations will encompass the Business Strategy, the customers Process and People; the Facilities and finally Technology and offer a cohesive and comprehensive set of ideas. Finally Return on Investment models will be built and overlaid against a achievable and pragmatic timeline to give the customer clear and concise Contact Centre options.



RESULTS INTERPRETATION

IPI will deliver a summary of the overall assessment from the self assessment surveys across focus groups and contact centres. For example:

- Strategy not communicated effectively
- Processes are highly inefficient and dated
- Technology use and effectiveness is not measured or monetised
- Misalignment with HR and CS requirements
- Facilities cause the highest level of dissatisfaction and concern to the frontline

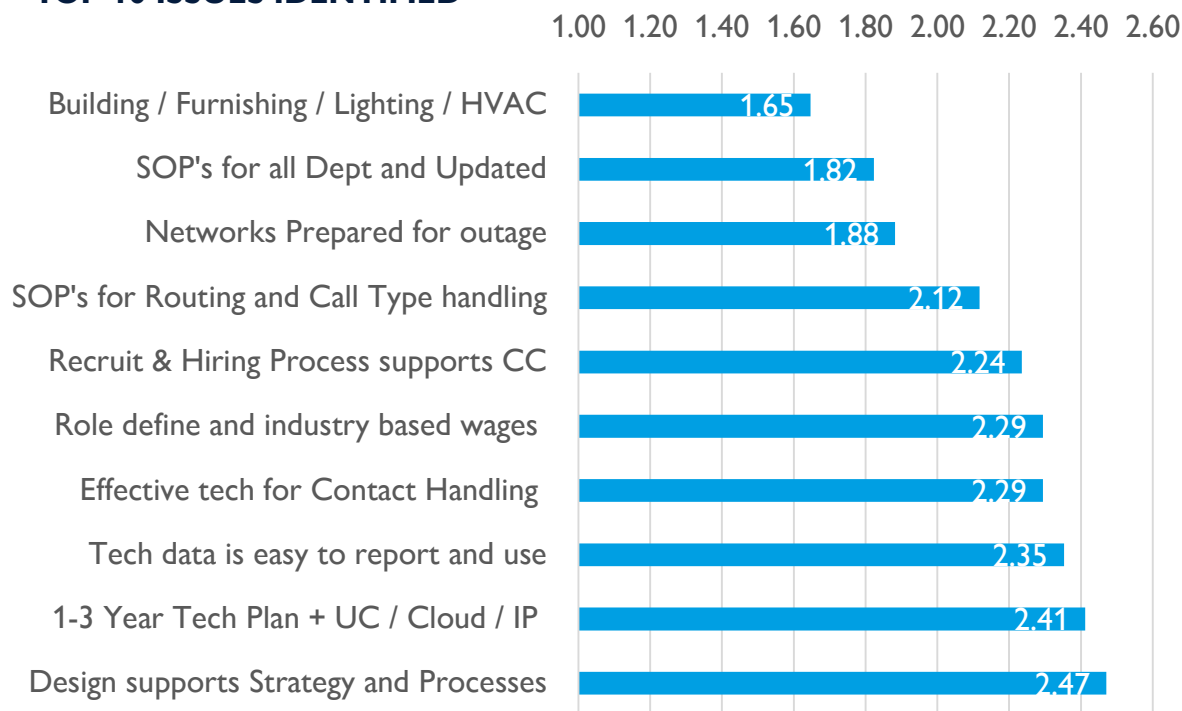
IMPROVEMENT STRATEGY

Recommendations are provided to deliver immediate operational improvement and optimum deployment of technology, e.g:

- Develop **career paths** and professional development plans, and use fair performance evaluations
- Digital Communication Programme to frontline staff via digital medium that allows for comments
- Contact centre process audit to identify processes suitable and effective for automation
- Measurable customer satisfaction data to benchmark performance against competitors and non-competitors in order to set performance goals

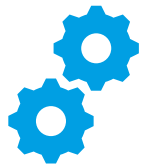
	AVERAGE	MANAGEMENT	TEAM LEADERS	SUPPORT	ADVISORS
TOTAL SCORE	50.0	59.60	53.60	38.20	55.86
RATING	1	1	1	1	1
PERFORMANCE	Failing	Failing	Failing	Failing	Failing

TOP 10 ISSUES IDENTIFIED





TECHNOLOGY ASSESSMENT



INFRASTRUCTURE AUDIT

The Infrastructure Audit is used to identify and document the Contact Centre Infrastructure and provide observations and recommendations for short and long-term improvement.

CURRENT STATUS

IPI will provide a detailed evaluation of the current status of existing technologies deployed within the contact centre. This includes licence numbers, version and release information and support status.

Our consultants will also detail dependencies on external systems and databases, operating costs and single points of failure in systems, processes and connectivity.

RECOMMENDATIONS

IPI will deliver a comprehensive report with observations, considerations and recommendations for both short term improvements and strategic transformation. This includes, but is not limited to:

- Tactical, immediate improvements
- Identification and recommendation of technology and processes requiring investment e.g:
 - Upgrades/migration strategies such as Cloud
 - Platform consolidation for centralised administration and control
 - Front and back office process automation enablement
- New technologies that can deliver significant impact based on gap analysis and business need



CUSTOMER EXPERIENCE & AGENT ENABLEMENT

During the on-site audit, IPI consultants will shadow contact centre agents, document processes and customer experience across channels in order to recommend improvements for both CX and EX.

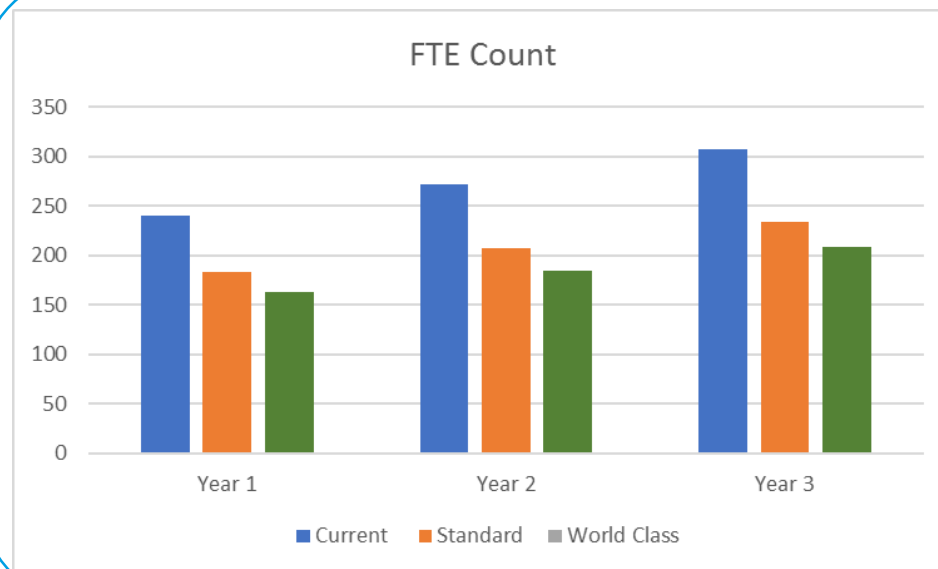
CURRENT STATUS

During the site visit IPI will observe and document the current processes and technology affecting customer effort and experience. This will include a review of contact handling by agents and self service channels, routing (ID&V, personalisation etc), in-queue treatments, IVR menus, contact reason, transfers, contact volumes/handling times/ abandonment rates, queue times, and other metrics.

RECOMMENDATIONS

In addition to the Current Status analysis, IPI consultants will deliver a set of recommendations for improving service, customer satisfaction and employee effectiveness. This will include, but is not limited to:

- Changes to existing processes and technology that deliver immediate improvements
- Technology focus areas that meet immediate and future business needs including:
 - Call deflection solutions for reduced customer friction, improved first call resolution and reduced operating costs
 - Agent enablement solutions reducing attrition
 - Operational cost reduction through process automation and Cloud
- A model for both transitional and transformational technology strategies based on return on investment analysis



IPI will develop a Return on Investment Model and Benefits Realisation Summary which will give the customer an educated insight allowing decisions on what and when to make financially viable improvement options.

The Return on Investment calculations will factor the achievable release of capacity in full time employees if the people, technology and process recommendations are adopted within the business

Included with this is a comparison of how these findings benchmark against world leading contact centre performance in terms of key performance indicators and success criteria.

IPI are aware that contact centres are in different stages of their maturity and therefore offer our recommendations based on Standard (Transitional) or World Class (Transformational) models.

IPI will also highlight the non-tangible impact on customer experience and employee engagement, and how that relates to the Return on Investment models recommended.



“THE NEXT WAVE OF
TECHNOLOGY CHANGE HAS
ALREADY BEGUN, AND THE
TIME FOR CHANGE IN ANY
BUSINESS IS NOW.”

F R O S T & S U L L I V A N

The rationale of the Contact Centre Assessment (CCAP) is to take organisations on a transformational journey, one that is fully enabled and measured for success. The table below illustrates the additional practice areas and complimentary solutions IPI can provide after the initial CCAP has been delivered.

From your aspirational vision of digital transformation, its conception and promise, to tangible competitive benefit, IPI is a trusted advisor and partner to contact centres of all sizes. Our consultants can discuss the investment required and value impact of the below universal pain point menu, to full holistic programs that harmonise people, process, technology.

Customer Interaction Management		Assess	Design	Implement	Transform	
Customer Experience	Touchpoint Optimisation	Touchpoint Analysis	Touchpoint Mapping	Touchpoint Alignment	Touchpoint / Digital Optimisation	
	Customer Value Optimisation	Customer Experience Audit	Customer Value Roadmap	Loyalty Blueprint	Customer Value Optimisation	
Operations Management						
Employee Experience	People Management	Contact Centre Report Card	Employee Experience Audit	Effective Programme Design	Recruiting, Training & Development	Effectiveness Programmes
	Organisational Effectiveness		Organisational Readiness Assessment	Organisational Design	Leadership / Org. Development Change Management	Performance Optimisation
Business Experience	Process Optimisation		Process Effectiveness Assessment	Process Mapping & Design	Process Alignment	Process Optimisation
	Systems & Technology Management		Technical & Technology Assessment	Solutions Design Migration Planning	Vendor Selection Project Management System Integration	Technology Optimisation “On-Tap” Services
	Reporting & Quality Management		Reporting & Metrics Assessment	Reporting & Metrics Alignment	Reporting & Metrics Systems Implementation	BI & Quality Optimisation “On-Tap” Services

The above services will be priced on application

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