

## Reporting Call Center Activity to Upper-Level Management

by Brad Cleveland

Are your reports meeting your objectives by telling you what you really need to know? Or are they just numbers that mask much of what's really happening?

One of the tougher challenges that call center managers face is reporting call center activity to upper-level management. Consider the issues: senior management doesn't have a lot of time to pour over reports; there is a significant amount of activity in a call center; summary reports often gloss over important information, while detailed reports swamp the reader with too much information. As a result, many diligently-prepared reports to go unread, are misunderstood, or do not serve any worthwhile purpose.

Consider just one fact of call center activity; what happens to the callers? As new ways of handling calls are invented, it becomes more difficult to measure the service that callers are receiving, and their perceptions about that service. Service level reports can tell us what percentage of calls were handled in X seconds for live answer groups. But what about callers who used the Voice Response Unit (VRU) without talking to an agent? Or those who left a message for a later callback? Or those who abandoned the queue or got a busy signal? Or who were overflowed to secondary group(s) that are perhaps not trained to handle the calls as effectively?

Obviously, a variety of reports are necessary to paint a clearer picture of what's going on. And to be correctly interpreted, they must often be viewed in terms of how they relate to one another. The analogy may be a stretch, but I often think of the instruments in an aircraft. By looking at key information together, such as altitude, airspeed, rate of climb or descent, and rate of turn, the pilot knows what's happening. Any measurement by itself is of limited use.

### A Seven-Step Approach

The following is a summary of an approach used for analyzing and/or choosing reports for upper-level management.

1. What are the objectives? What should senior management know about the call center activity, and why? If nobody knows for sure, then it's time to assemble a team for working discussion around a white-board or easel. Key call center managers, upper-level managers and agents should be involved. General areas of concern often include:
  - Workload handled (in recent past) and workload forecast
  - Customer satisfaction and quality measurement
  - Resource utilization (e.g. scheduled agents to actual)
  - Queue reports (e.g. service level, abandonment, etc.)
  - Access alternatives used (e.g. automation, inbound calls and outbound calls by group, etc.)

Don't worry yet about whether specific reports can be produced to support the Objectives; this step is more general. For example, one objective might be "to know what's driving demand: what's causing the different types of calls we're getting?" It's often useful to preface this exercise with a question like, "If we could snap our fingers to produce focused information, what would we want to know about our call center?" The objectives your team comes up with will provide much needed direction.

2. What specific information supports the objectives?

Consider information available from the Automobile Call Distributor (ACD), database computer, voice processing system, telephone network, customer surveys, other departments, and elsewhere. It's helpful to list the alternative under each of the above objectives. Graph

The challenge now becomes one of selection. Stephanie Winston, author of the aging but still popular book, *The Organized Executive* (1983) advises that "a report should not simply be a compendium of facts, but a judgement tool for management; the right information presented in the right way to the right people." Is the proposed report really necessary? What question does it answer? Which reports would you dispense with if you were charged for them? Could several reports be combined?

3. Are the reports easy to read? The next step is to decide how to present the data in as clean and readable a manner as possible. Think GRAPH. And keep in mind, more paper isn't always bad. A ten page report of graphs is often quicker to read with higher comprehension and retention than a two page report comprised of rows and columns of numbers. Graph

Reports that are to be viewed together – things like service level versus blockage and abandonment, should use the same general format for headings, axes (such as period of time covered) and type of chart. When possible, show related trends and information on the same chart, such as in Figures 1 and 2.

4. Do the reports mislead? It's no secret – in the call center world, reports can say whatever we want them to say. For example, we can prop up service level by generating controlled busy signals, overflowing calls to other groups, or taking messages for later callbacks. Clearly, just looking at a report on service level is misleading – the reader needs more information.

Similarly, cumulative summary reports can conceal important information. Some produce monthly totals for key information: "Our average speed of answer (ASA) for the month of April was 18 seconds." The problem is of course, that we can be days, especially at certain times of the day, and have idle capacity much of the rest of the time. In fact, there is an incentive for us to keep agents tied to the phones during slower times (when they could be getting other things done) because we want to make up for lost ground. A better approach would be report the percentage of half-hours during which our service level is within a specified range we specify ( say 65 to 90 percent of calls answered in 20 seconds) and, how much of the time we were over the range ( over staffed) vs. under the range (understaffed) – see the example in Figure 3. Alternatively, we can simply graph service level by time of day and day of month, with each graph covering one agent group for one complete week. Warning: the graphs can look pretty busy (something like a pre-schooler's drawing), but there's less chance for misunderstanding. The downside with either approach is that we don't know how many calls were involved when service level was up or down – even so, either is far better than "average" service level.

Weighted averages can also be misleading for the reasons stated above. For example, some use weighted averages to combine the reports of multiple answer groups, small and large alike, into one neat set of numbers. The service level in small groups has less impact on the final report than the service level in larger groups. The problem is, small groups may be the most important, in terms of type of customer or service, but the numbers get lost in the process. It's often better to break out reports by group.

5. Do the reports provide additional insight, where necessary? There are instances where we need not only explain what happened, but why. Why did service level drop and average speed of answer go through the roof January 17, 18? Ideally, a footnote gives the answer – "Blizzard and ice storms on East Coast."

6. Are the reports understood? Giving someone a report of what happens on Monday mornings versus bringing upper management into the call center for ten minutes to feel what happens is the difference between night and day. Of course, we need to do both. I am convinced that a person cannot understand

call center reports unless they spend at least some time in the call center.

7. Is there a forum for discussing/acting on the information? The reality is , reports do us no good unless we have the means to act on them, and to make adjustments to our operations as necessary.

Unfortunately, a lot of call center managers struggle with that awful feeling of sending out reports and never hearing back unless something bad happens. There's a better way – starting with Step 1.

This ongoing column is written by Brad Cleveland, Vice President of Incoming Call Management Institute based in Annapolis, Maryland. Cleveland is a popular MOBIUS author and frequent SOCAP speaker.