HOW TO ASSESS, AUDIT & BENCHMARK YOUR CONTACT CENTRE

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How to Assess, Audit, Baseline & Benchmark your Contact Centre to achieve World Class Status

Why should you audit, baseline and then benchmark your call centre or contact centre or customer service centre?

It is all well and good to set out to be a 'World Class' contact centre, and to strive in all things to achieve this laudable accolade, but pause for a moment, and let's look at the actual de. nitions of 'World Class'. What is it that we are setting out to achieve? It's a journey that we need to fully understand. Where will this journey take us? Through what uncharted waters will we have to voyage on bravely in order to reach that 'World Class' destination? Will this quest be worthwhile?

The experts tell us that 'World Class' means: "*Goods, services, and processes that are ranked by customers and industry experts to be among the best of the best*." Now let's look at the second part of the de nition. It says: *"This designation denotes standard-setting excellence in terms of design, performance, quality, and customer satisfaction and value when compared with all similar items from anywhere in the world."*

Now there's the real challenge. Is it worth the quest and the efforts? It certainly is. Once achieved, in that high place of excellence your contact centre will run like a Ferrari on steroids. It will be incredibly effective. It will be highly ef cient, and it will de nitely achieve all its prescribed operational goals, targets and objectives. And you will look really good in the eyes of the executives!

What is a 'World Class' Contact Centre?

To be truly 'World Class' a contact centre needs to comply with **three** fundamentals:

Firstly, it must be totally and undeniably aligned with and supporting the organisation's core strategic and tactical goals and aspirations. If it's not doing this, the operation is probably operating counter-productively, and certainly unnecessarily squandering valuable resources. When the organisation's executives see and appreciate that the contact centre has become an incredibly powerful and valuable asset (as opposed to being a reluctantly funded cost centre) that's when much needed resources start becoming available to the contact centre management team.

Secondly, the contact centre must operate according to numerous clearly defined and specific standards. There's now yet another massive challenge. What standards should your operation adhere to? Strictly speaking (and up to a point) as a manger you could simply define your operation's own 'standards'. These might comprise of the Business Operating Model, the Organisational Strategies and Objectives and the Operational KPIs that drive (or should drive) your centre. And there are literally hundreds of standards and KPIs to choose from.

In fact, in an exercise that I was privileged to be a part of a few years ago, we put together a team of highly experienced contact centre consultants and we accumulated over 480 contact centre KPIs. These came from a host of different sources ranging from the writings of well-known and respected authors such as Brad Cleveland (Call Centre Management on Fast Forward) to the COPC and the Dimension Data / Merchants Global Benchmark Study. And based on our team's extensive experience, we threw in a host of what we considered to be additional best practice guidelines, 'standards' and KPIs. Not for a moment am I suggesting that any organisation should adopt all 480 of these KPIs, but they do form a very good checklist from which to select those that are most appropriate to your particular operation. (This 480 item checklist is available free of charge to our clients)

Today, I would most definitely also integrate into 'best practice' many of the international standards such as the ISO 18295 (1 and 2) and where appropriate, the South African Bureau of Standards SANS900-1/3. Contact Centre Standards. (Outbound, Inbound and Back Office)

Other Standards such as those of certain statutory, regulatory or professional bodies must also be considered and integrated into your operation's baseline standards.

It is also vital that specific standards and KPIs relating to both internal and external customer expectation are clearly defined. And here I add a word of caution: Don't make assumptions as to what you think customers expect. That's a fatal mistake. Ensure that your operation has a constant feedback mechanism to monitor and report on actual customer expectations.

Once these standards have been clearly defined and well documented, to be rated as 'World Class' in terms of Operational Standards, the contact centre must achieve a better than 85% compliance score for each line item in audits carried out by a suitably qualified assessor or auditor.

Concurrently with such assessments or audits, the contact centre also needs to achieve a minimum of 85% compliance with those KPIs and standards recognised globally to represent best practice.

Thirdly, to be considered 'World Class', the operation needs to be benchmarked against similar operations. Or, putting it more succinctly: *'Benchmarked against National, Regional and International same sector and competitive contact centres.'* And therein lies the real challenge. How do you go about creating a baseline and then benchmarking your call centre or contact centre?

One option is to appoint a specialised contact consultancy; one with highly developed systems, tools, methodologies and the appropriate experience, skills and reputation. Alternatively, you may want to consider carrying out your own contact centre continuous improvement programme to enable you to baseline, assess and benchmark your operation on an on-going basis. It will mean having to set up a sizable internal project and you will probably have to utilise your own staff and other internal corporate resources. It is a dif cult and lengthy task, but it is certainly an option.

The rest of this booklet is dedicated to assisting those contact centre professionals who are prepared to put in the long hours to build and to populate their own assessment, auditing and benchmarking methodology and toolset.

HOW TO AUDIT, BASELINE & BENCHMARK YOUR CONTACT CENTRE

For clarity, let's start with some de nitions. Just so that we all know what we are doing and why. What's a baseline?

According to Wikipedia ….

baseline

- A value or starting point on an imaginary scale with which other things are compared
- A line serving as a basis, as for comparison, measurement, calculation, or location.
- A basis for comparison; a reference point against which other things can be evaluated

How's that for a start. Lots of good stuff in there. *'… which other things are compared.'*
Or how about *'.. basis, as for comparison, measurement, calculation ..'* And the one I really like is *'.. reference point against which other things can be evaluated.'*

Okay. Now let's get on with the 'benchmarking' part…

bench•mark

- A standard by which something can be measured or judged:
- To measure (e.g. a rival's product) according to speci ed standards in order to compare it with and improve one's own product

And there you have it again. 'Standards', 'Measurement' and 'Compare'.

WHAT NEEDS TO BE IN THE DIY ASSESSMENT TOOLKIT?

To be able to build and use your own Do-It-Yourself contact centre assessment, audit and benchmarking toolkit, there are basically ve skills that you will need. Each of these is not too dif cult to acquire.

What you need to learn is …

- What to Measure
- How to Measure
- How to Score
- How to Create Dashboards
- How to Prioritize the Fixes

By reading on I will give you all the tactics and the techniques. But you'll have to provide your own tenacity!

Let's start with the easy part. What to measure.

WHAT TO MEASURE

We want to make a big difference to our contact centre operations, so let's monitor, measure and report on our actual **Operational Maturity**. In other words, how good (or bad) are we in operational terms? Have we learned from all those silly mistakes that we have made over the years? Have our improvement interventions made a real, positive difference? If so, how much of a difference?

Then of course, we will also need to measure how well (or badly) we have done in terms of integrating our business and organisational strategies with our operations and, of course, with our technologies.

Overall, what we want to come up with is an accurate picture of where our contact centre is in terms of the four imperatives; **Competency**, **CapacityCapability**, **Compliance** and .

WHAT DO YOU NEED TO UNDERSTAND IN YOUR CALL CENTRE?

Building the Assessment & Auditing Framework

Decide what needs to be Observed, Assessed, Measured or Audited.

We start by asking: What specifically do you need to truly understand in your particular call centre or contact centre? To get the process started, we need to create a framework and then populate it with as many probing questions (or aspects of the contact centre to be observed or measured) as may be necessary.

To give our assessment tool some structured order, let's start with the broad headings and then some sub-headings or works streams. Here in Figure 1 is a short checklist to get you started. (I strongly suggest that you do as I did and that you create this tool in an application such as Microsoft Excel.)

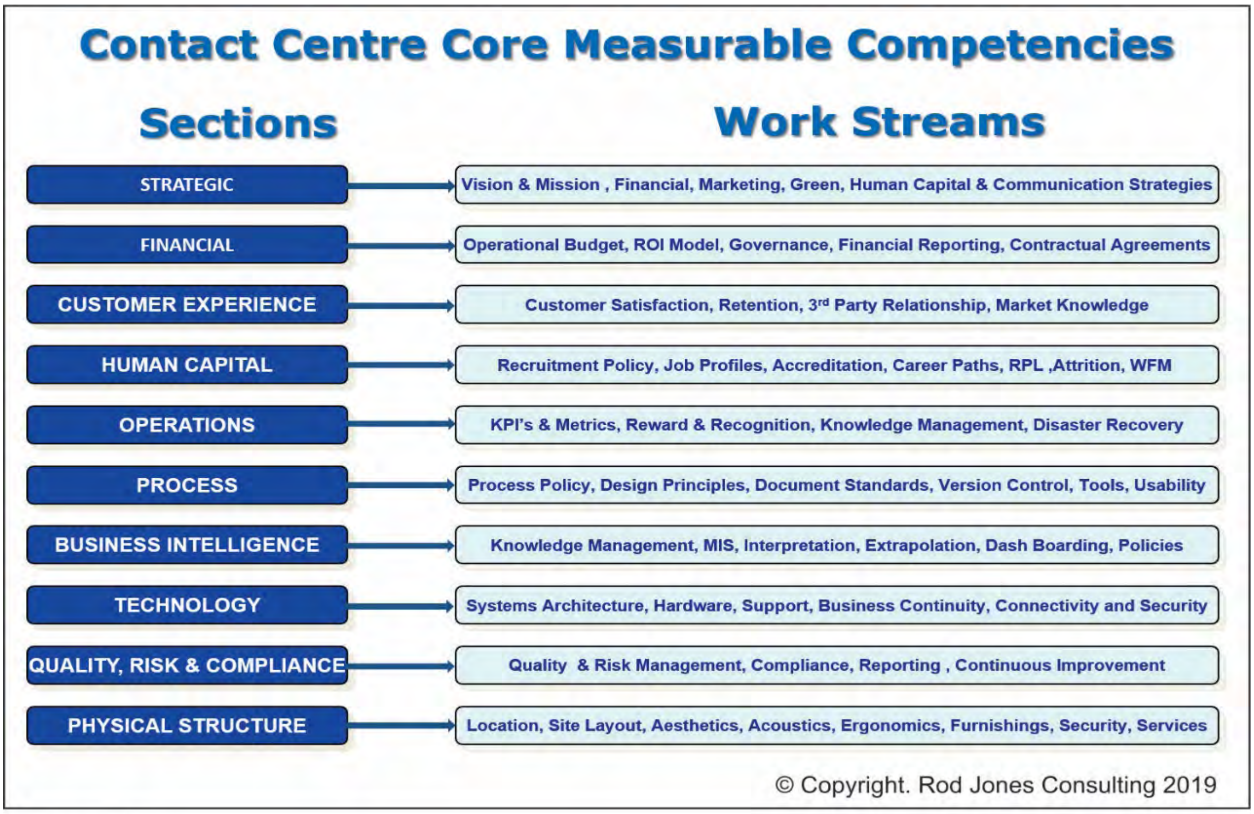


Figure 1

Whilst the Sections are fairly generic across most contact centres, you will have to give considerable thought as to how you go about constructing the sub-headings or Work Streams as these will be specific to your particular contact centre or organisation.

With a broad framework in place you are now well on your way to being able to expand each of these subheadings or Workstreams each into twenty, thirty or even several dozen actual questions or probes. We call these specific questions or probes the Focus Areas. These will be the various aspects of your contact centre operation that you can uniquely identify, and secondly, you can define a specific set of questions, measures, standards or KPIs.

With categories, headings and sub-headings in place, your contact centre audit tool is starting to take shape. Once you expand these sub-headings into specific questions or probes, you will start to see how the answers to these become your actual audit methodology.

The example illustration below in *Figure 2* shows how the Primary Section (4: People – Coaching and Performance) can be sub-divided into 8 Focus Areas and 24 Questions or Probes. Obviously, one needs a whole lot more sub-sections or Focus Areas and Questions or Probes than are shown in this example.

Example: Audit Tool Section / Focus Area / Questions or Probes

SECTION 4. PEOPLE

4.1 Coaching & Performance Management = 8 focus areas 24 Questions/Probes

4.1.1	**One-On-one coaching**	4.1.1.1	Is regular one-on-one coaching a Supervisor's KPI?
		4.1.1.2	Is one-on-one coaching carries out at least once a week?
		4.1.1.3	Do agents have a desire to be coached?
		4.1.1.4	Is Coaching perceived to be a positive activity by the majority of agents?
4.1.2	**Peer coaching**	4.1.2.1	Is Peer Coaching part of the day-to-day operation?
		4.1.2.2	Is Per Coaching having a positive impact?
4.1.3	**Incentives & bonus schemes**	4.1.3.1	Is there an Incentive scheme in operation in your contact centre?
		4.1.3.2	Is the incentive scheme driving performance improvements?
4.1.4	**Briefings**	4.1.4.1	Do Agent team receive a daily briefing?
		4.1.4.2	Are the briefing sessions appreciated by agents?
		4.1.4.3	Do briefing sessions follow a standard format / agenda?
4.1.5	**Career pathing**	4.1.5.1	Is there a clear Career Path for all staff in the contact centre?
		4.1.5.2	Do all the team know, understand and appreciate the Career Path
4.1.6	**Staff motivation**	4.1.6.1	Are the majority of the staff enthusiastic and motivated?
		4.1.6.2	Are motivational functions held on a regular basis?
		4.1.6.3	Do the majority of staff participate enthusiastically?
		4.1.6.4	Do staff make suggestions for ideas for motivational functions?
4.1.7	**Team building**	4.1.7.1	Is team building done with a particular purpose?
		4.1.7.2	Is Team Building done on a regular basis? Monthly?
		4.1.7.3	Can you see positive and tangible results from Team Building?
		4.1.7.4	Do you consider that your contact centre has a Positive Culture?
4.1.8	**Performance management**	4.1.8.1	Is a formal performance management system in place?
		4.1.8.2	Are Performance Appraisals carried out on a monthly basis?
		4.1.8.3	Do agents view performance appraisals in a positive light?

Figure 2

If you are diligent in the manner in which you approach the construction of your audit toolset, you will quite easily find that you will eventually have a set of anything between 200 and 500 checkpoints or questions or over 1000 if you integrate elements of the SA Contact Centre Standards or the ISO Customer Service Standards.

The illustration further on in this booklet will clearly show how to make provision in your spreadsheet for your Observations or Comments as well as for inputting brief Recommendations or suggested remedial interventions.

HOW TO MEASURE – HOW TO SCORE

How you actually measure each identified aspect of your contact centre is important, and one needs to be meticulously consistent to ensure that your method can be aligned back to established baselines, benchmarks, standards and other operational KPIs.

As a starting point, you may want to use a scoring methodology that my colleagues and I developed after having reviewed many different scoring methods used by contact centre consultancies in many parts of the world.

A starting principle is there will definitely be certain aspects of the operation that will have to be assessed on the basis of 'Compliant or Non-Compliant. Its binary; a simple Yes or No. But what about the 'shades of grey'? Here's how we approach the latter using a simple scale of 0 to 5. (You can also use 5 for Fully Compliant and 0 for Does not Comply)

We score a **ZERO** where some required aspect of the contact centre does not exist at all; where it is not in evidence; where there is no knowledge of it within the operation, or it does exist, but it is specifically not observed. We also apply a factor of risk to the line-item. More about the 'Risk Index' later.

To score **ONE** for whatever it is that we are observing or measuring, it must be present, but we observe that its implementation is inconsistent, it is ad hoc or there is insufficient evidence (documentation or interviews with personnel) to verify that it exists or that it is implemented or consistently observed in the operation.

To score **TWO** we need to be able to see tangible evidence that such a practice is, in fact present in the operation, but the **TWO** score indicates that it is not actually integrated as part of the day-to-day operational practice. It may have the basics in place, but a great deal of development work is still required. It needs to be fully assimilated into the operations and understood by all personnel. It must also form part of the standard reporting process. Risk is also taken into account and may bring down scores.

A score of **THREE** is a good indicator that the operation is aware of the importance of this measure, standard or metric, but its application is not yet fully integrated into the operation as a key aspect of reporting, or of continuous improvement initiatives. It may be present and fairly well defined, but it may not be reported on, or there may be insufficient evidence of its consistent application. The ‘Quick Fixes’ for THREE-scores are usually easy and inexpensive. Risk is also a factor.

A score of **FOUR** is an extremely healthy figure. At four, we are looking at – for example – a policy, process or operational procedure or methodology or desirable practice that is fully integrated into the operations of the contact centre. It will certainly be measured accurately and diligently on a day-to-day basis; it will be reported on regularly (a management daily dashboard is a good indicator of a 4) and this measurement, metric or practice will be seen by all within the operation to be a significant contributor to the operation’s continuous improvement programme.

A score of **FIVE** is awarded where we see true ‘World Class’ standards and operational excellence in evidence. It cannot be signi cantly improved on. To recap: To be considered ‘World Class’ a contact centre must support and be aligned with the core business strategies of the organisation. Operationally it must meet speci c standards and thirdly, it must constantly benchmark itself against National, Regional and International sector and competitive contact centres. It must embrace the principle of Continuous Improvement.

WE MUST ALSO AUDIT FOR RISK

As an aspect of setting up your audit tool (spreadsheet) you will be well advised to provide for a simple yet highly effective Risk Assessment metric. Almost every line item of your assessment or audit checklist will be able to be scored as a degree of risk to the operation or to the organisation. I have found that a simple Low-to-High assessment on a 0-5 scale works. To enable calculations and the development of Risk and Prioritisation models, I suggest that for the purposes of your spreadsheet you weight these assessments using the following two-part model to arrive at a **Risk Index**. Bear in mind that for the purposes of this model, ‘Risk’ is somewhat of a subjective observation or just good common sense.

Business Impact: How seriously will this risk impact the business? Assess this on a scale of 0-5

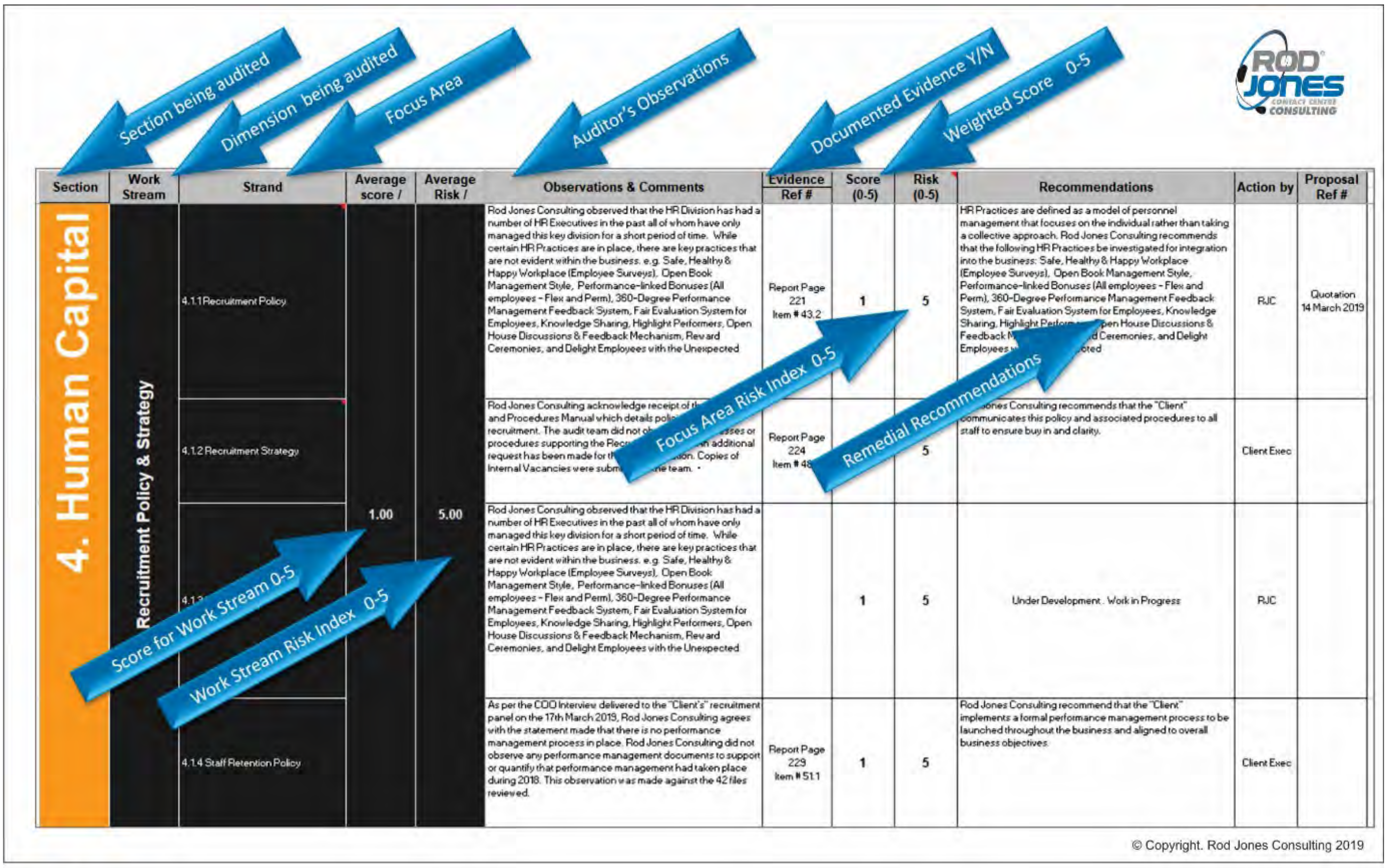
Probability: What is the probability that this risk will impact the business in the foreseeable future?
Assess this on a scale of 0 to 5

Risk Index: Add the Business Impact score and the Probability score together and divide by two.

BUILDING THE AUDIT TOOLSET

You are now armed with the framework for your spreadsheet-based audit tool, listing each and every important strategic and operational component of your contact centre. You also have a method of identifying either 'Compliance' or 'Non-Compliance', as well as a 0-5 Operational Performance scoring method and a 0-5 graded Risk Index.

What we now need to do is to expand the spreadsheet to include columns and cells into which you can insert Operational Performance and Risk scores as well as Notes, Comments and Observations and Recommendations or decisions regarding remedial interventions. Figure 3 below is a shapshot of a small section of a typical assessment spreadsheet.



Section	Work Stream	Strand	Average score /	Average Risk /	Observations & Comments	Evidence Ref #	Score (0-5)	Risk (0-5)	Recommendations	Action by	Proposal Ref #
4. Human Capital	Recruitment Policy & Strategy	4.1.1 Recruitment Policy	1.00	5.00	Rod Jones Consulting observed that the HR Division has had a number of HR Executives in the past all of whom have only managed this key division for a short period of time. While certain HR Practices are in place, there are key practices that are not evident within the business. e.g. Safe, Healthy & Happy Workplace (Employee Surveys), Open Book Management Style, Performance-linked Bonuses (All employees - Flex and Perm), 360-Degree Performance Management Feedback System, Fair Evaluation System for Employees, Knowledge Sharing, Highlight Performers, Open House Discussions & Feedback Mechanism, Reward Ceremonies, and Delight Employees with the Unexpected	Report Page 221 Item # 43.2	1	5	HR Practices are defined as a model of personnel management that focuses on the individual rather than taking a collective approach. Rod Jones Consulting recommends that the following HR Practices be investigated for integration into the business: Safe, Healthy & Happy Workplace (Employee Surveys), Open Book Management Style, Performance-linked Bonuses (All employees - Flex and Perm), 360-Degree Performance Management Feedback System, Fair Evaluation System for Employees, Knowledge Sharing, Highlight Perform[illegible]pen House Discussions & Feedback M[illegible]d Ceremonies, and Delight Employees [illegible]cted	RJC	Quotation 14 March 2019
		4.1.2 Recruitment Strategy			Rod Jones Consulting acknowledge receipt of t[illegible] and Procedures Manual which details poli[illegible] recruitment. The audit team did not o[illegible]sses or procedures supporting the Rec[illegible]n additional request has been made for t[illegible]ion. Copies of Internal Vacancies were subm[illegible]he team.	Report Page 224 Item # 48[illegible]	[illegible]	5	[illegible]ones Consulting recommends that the "Client" communicates this policy and associated procedures to all staff to ensure buy in and clarity.	Client Exec	
		4.1.3 [illegible]			Rod Jones Consulting observed that the HR Division has had a number of HR Executives in the past all of whom have only managed this key division for a short period of time. While certain HR Practices are in place, there are key practices that are not evident within the business. e.g. Safe, Healthy & Happy Workplace (Employee Surveys), Open Book Management Style, Performance-linked Bonuses (All employees - Flex and Perm), 360-Degree Performance Management Feedback System, Fair Evaluation System for Employees, Knowledge Sharing, Highlight Performers, Open House Discussions & Feedback Mechanism, Reward Ceremonies, and Delight Employees with the Unexpected		1	5	Under Development . Work in Progress	RJC	
		4.1.4 Staff Retention Policy			As per the COO Interview delivered to the "Client's" recruitment panel on the 17th March 2019, Rod Jones Consulting agrees with the statement made that there is no performance management process in place. Rod Jones Consulting did not observe any performance management documents to support or quantify that performance management had taken place during 2018. This observation was made against the 42 files reviewed.	Report Page 229 Item # 51.1	1	5	Rod Jones Consulting recommend that the "Client" implements a formal performance management process to be launched throughout the business and aligned to overall business objectives.	Client Exec	

Figure 3

Weighted Scores

Notice in *Figure 3* that the Weighted scores for each of the Strands are totalled and averaged and then pulled through to the Work Stream Average Score. In this example, the Recruitment Policy &Strategy Work Stream. The same applies to the Risk Score.

Other Features of the Assessment Tool

Evidence: In this example, provision is made for a column in which a brief reference is made to the speci c evidence (if any) that was examined by the assessor or auditor. Note that the cell shows a reference to a speci c report and the item number or reference in the report.

Recommendations: It needs disciple to keep recommendations brief and at a high-level. You can expand on recommendations in separate supporting proposals or documents. See the Proposals Reference column. Tip: In most cases, 'Recommendations' will be down to good, old fashioned common sense. If you nd it dif cult to gure out what to do to improve a poorly rated line-item, you may want to run and internal workshop or brain-storming session with colleagues. You will be surprised how valuable group discussions can be when it comes to problem-solving.

Populating the Assessment or Audit Tool

Now that you have constructed the framework for the baseline or audit, and the scoring methodology, the rest will mean long hours and a great deal of hard work gathering information, collecting data and operational evidence, applying the Performance and Risk Index scores and entering this information into the spreadsheet assessment or audit tool.

By the time you have completed the actual audit and populated your spreadsheet, you will have a vast amount of data to start working with. You may want to start by totalling and averaging scores by Section, Workstream or Strand. For example: Technologies, or Human Capital or Processes. And here will emerge the really signi cant scores. You will nd that each section that you work on will produce an *averaged* score of anything between Zero (heaven forbid!) and 5; World Class.

As you continue through each section you will start to build a data set that will eventually allow you to plot exactly where your contact centre is at the time of the audit. The data will also clearly show you where there is a speci c **Performance Improvement** intervention needed. The addition of the **Risk Assessment** will also be a clear indicator to guide you towards building prioritisation models.

BUILDING THE DASHBOARDS

I have to be honest. Building dashboards using the audit tool scoring methodology requires particularly high-end Excel skills. This is the part that I personally outsource to specialists. Unless you rank yourself as one of these Excel-Gurus, ask around your organisation. There's certainly going to be an Excel Geek somewhere, and hopefully she or he will be enthusiastic about helping you with this assignment.

Overall Performance Dashboard

In *Figure 4*, below, the performance scores data has been pulled through from the various Sections to clearly show the relative performance of each Section in terms of the Contact Centre Maturity Model; from Foundational, to World Class.

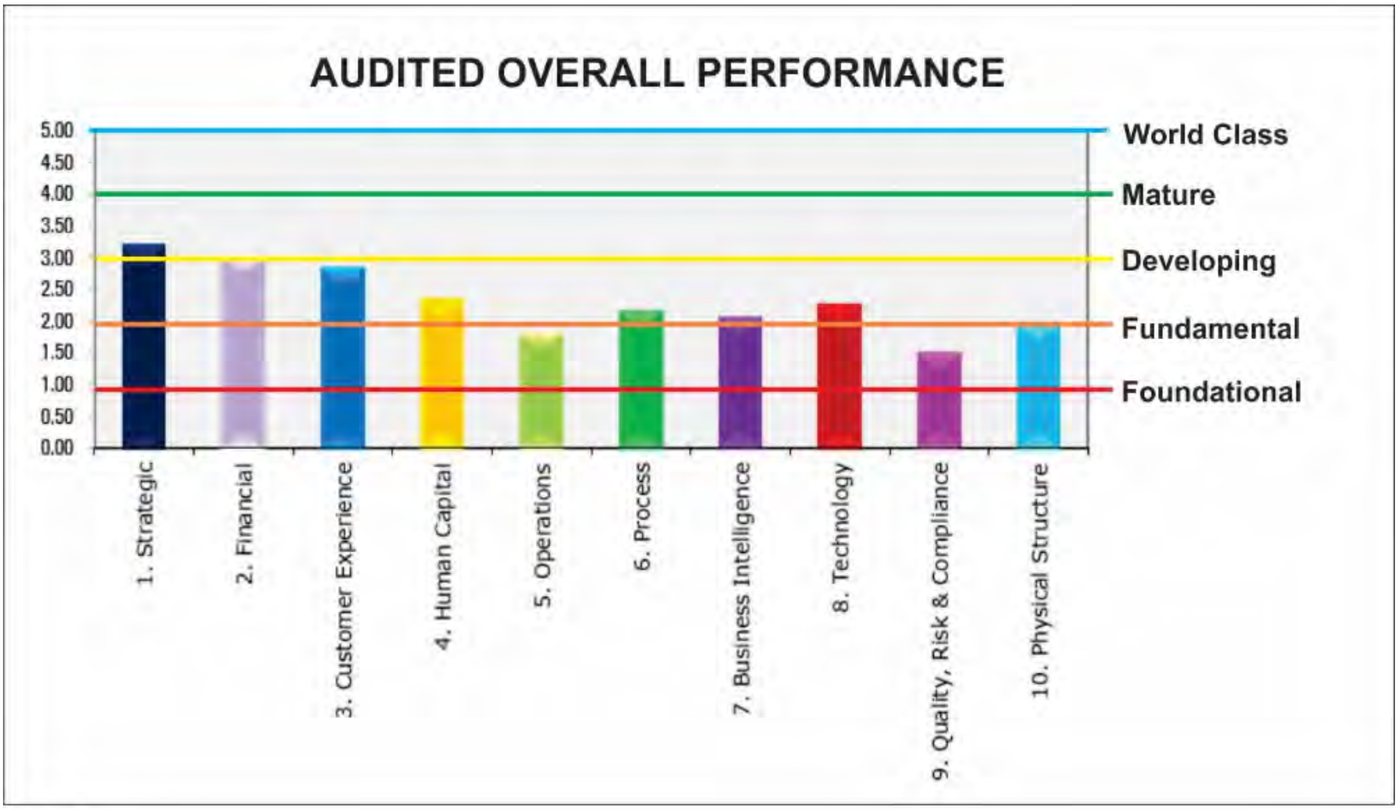


Figure 4

The Performance-Risk Model

There are several ways to construct a Performance-Risk dashboard. *Figure 5* and *Figure 6* below are two examples of how you can use the data from the assessment or audit and present it as a powerful management dashboard using some of the advanced features of Excel. It is important to present both the 'performance' score and the 'risk' score together to re ect the true status of the operation.

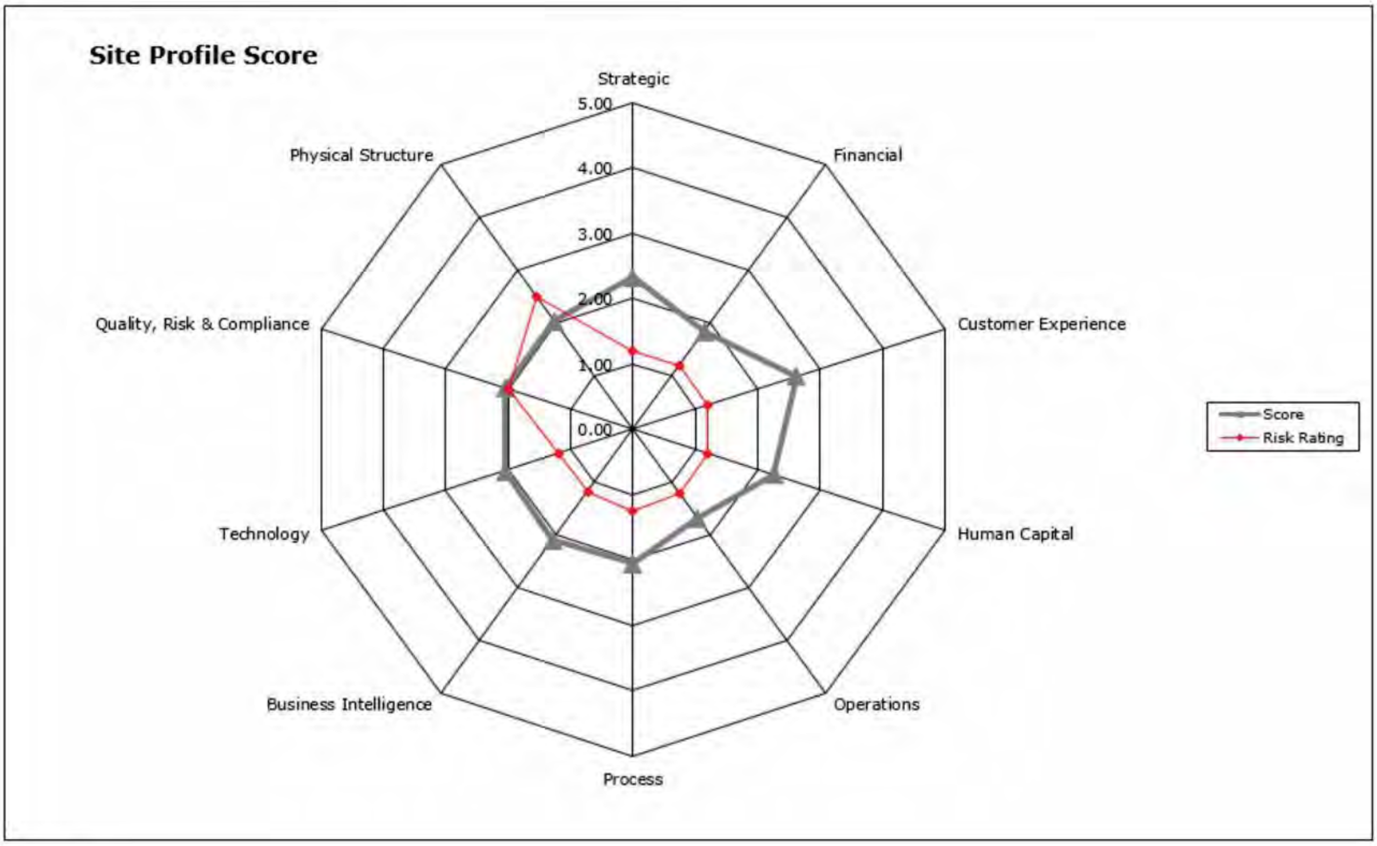


Figure 5

In *Figure 6* below we overlay a different example of Performance and Risk to show how each Section of our assessed contact centre is positioned relative to Performance and Risk. In this example, it was the poorly documented and 'sloppy' Processes Section on this particular site drove down the overall Risk-Performance index into the Low Performance / High Risk quadrant. Over time, when remedial interventions are implemented in each Section, Performance improves, and Risk is mitigated or significantly reduced. The ultimate goal is to ensure that all Sections appear in the upper left quadrant – High Performance/Low Risk.

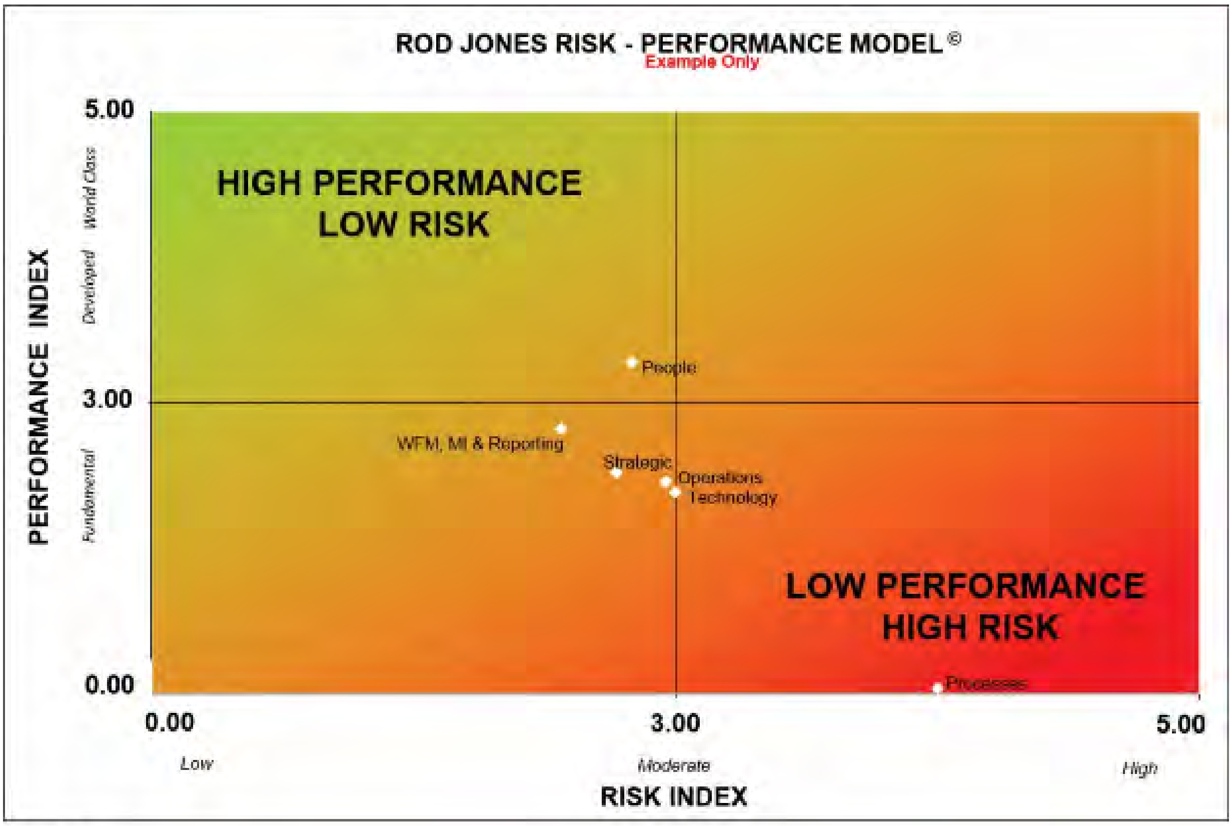


Figure 6

The Maturity Model

Once you have constructed a comprehensive audit model and carried out the investigations and assessed scores for both Performance and Risk, you will also be able to build an accurate **Contact Centre Maturity Model** such as the example below. In this example, the assessment scores calculated the position of the 'X' and positioned this particular contact centre midway between being 'Developing' and 'Mature'.

The assessment and scoring methodology plus the thinking that goes into the Recommendations, positions the operation to systematically drive towards achieving operational excellence; World Class status.

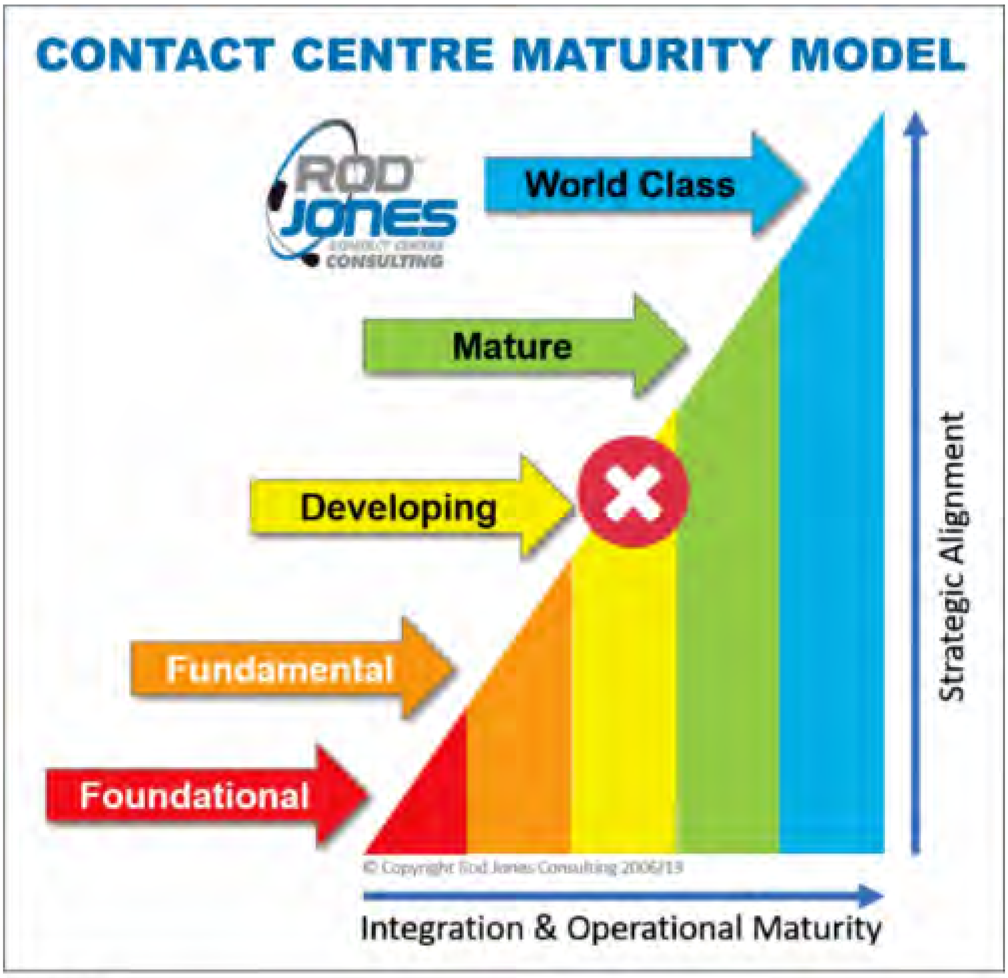


Figure 7

DEFINE AND IMPLEMENT THE 'FIXES'

Having systematically assessed or audited and scored (for Performance and Risk) each of the Sections and sub-sections making up your particular contact centre, you are now able to go back into the tool and decide on what needs to be done to improve operational performance scores, and to reduce risk scores where appropriate. This is also the opportunity to decide who will be designated to carry out the speci c remedial interventions or tasks. It is also a good idea to use this model to clearly de ne responsible individuals and all the deliverables and deadlines associated with designated tasks.

As an experienced contact centre professional, crafting and implementing the ' xes' or improvement interventions will no longer be "rocket science". In fact, in most instances you will nd that the majority of the ' xes' will boil down to **Processes**, **Disciplines** and good old fashioned **Common Sense**. That done, you can now create the improvement and development project, assign tasks and deliverables to your team and then watch the magic start to happen!

Figure 8 below shows how the last three columns on the right are used to write up short notes outlining the Remedial Recommendations or Interventions as well as for nominating speci c individuals or teams to implement these interventions. For the sake of brevity in this actual assessment tool, use the last column as a reference to a speci c proposal document, motivation, internal memo or other documents.

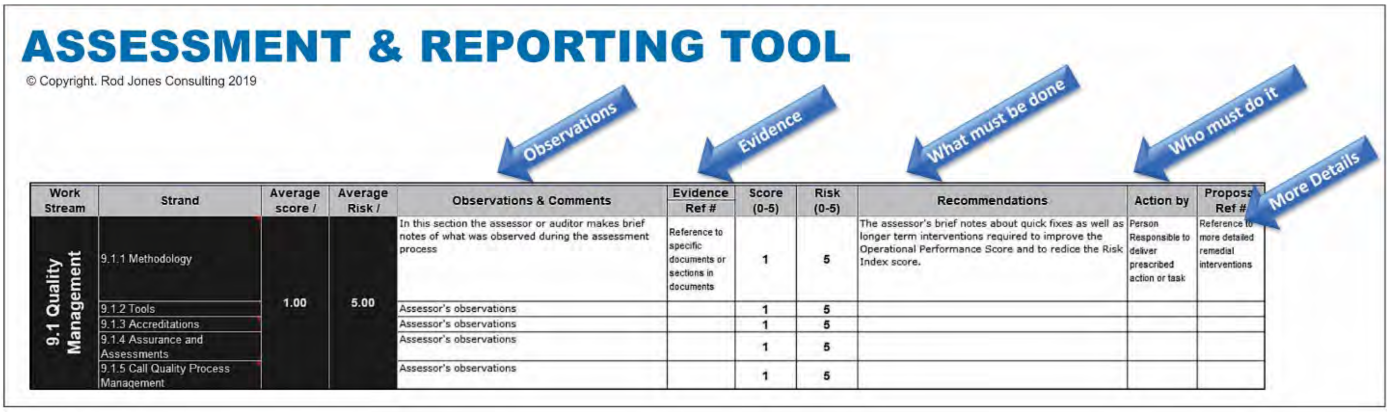


Figure 8

When you conduct your second and subsequent audits some six to twelve months after the initial assessment, you will be astounded with what you and your team will have achieved in a relatively short space of time, and with limited spend.

CONCLUSION

The journey from being a basic call centre or contact centre to being recognised as truly 'World Class', can be a long and arduous road. It's not easy, particularly if you are not provided with the necessary resources. But as long as you have a clear picture of each of the many hundreds of checkpoints that make up the overall ecosystem of your operation, a rational and methodical approach will get you there a great deal quicker than you might have thought.

Remember: If you are NOT constantly making improvements and positive adjustments to every facet of your contact centre operation, the certainty is that it will be constantly deteriorating.

As you will no doubt have realised, building a comprehensive contact centre assessment, auditing and benchmarking tool or methodology is not easy. And it takes a huge amount of time and resources. Carrying out the actual assessment is also a massive, resource-intensive exercise that very few contact centre operational managers can justify.

However, the bene ts and the value of doing a thorough assessment, audit and benchmarking exercise at least once a year, are immense.

Here's how I can help.

Blank or Pre-Con gured Templates

I have spent many years developing and building a variety of contact centre assessment templates and tools; from very simple questionnaires to complex models such as the one described in this booklet. For clients wishing to do assessments themselves I can supply templates either in 'basic framework' form, or pre-con gured and customised in terms of clients' speci c requirements.

Alternatively, you may rather want me to quote for doing an Assessment or Audit and Benchmarking using one of my well-proven methodologies. Read more about the various options on the next page.

1: Intermediate Contact Centre Assessment

My Intermediate Assessment is based on having a certified Rod Jones Assessor observing and investigating seven primary sections of the contact centre and using a proprietary template, investigating and observing 188 specific check-points. This is a two to three-day on-site assessment followed by a three-hour feedback workshop in which we present high-level Observations, Findings and Recommendations.

2. Comprehensive Assessment and Audit with Performance-Risk Scoring

We can fully customise and build a comprehensive contact centre assessment and auditing tool as outlined in this booklet. Depending on client's requirements, such a methodology can be designed and built to probe, investigate and measure from several hundred to a thousand or more line-item checkpoints, across all dimensions of the contact centre, front and back office operations. These assessment tools can be provided for self-assessment by you, our client, or we can carry out the process with a team of certified assessors on the basis of a professional consulting engagement.

3. Comprehensive Assessment with Internationally Recognised 'Best Practice' Benchmarking

Rod Jones Consulting (Pty)Ltd is the African representative for Customer Services Audit Ltd, the developers and licensors of Snapshotz, a globally recognised, on-line contact centre assessment and benchmarking application. The web based Snapshotz methodology probes over 800 contact centre datapoints across 8 main sections and 29 sub-sections of the operation.

To provide a thorough Benchmarking, Snapshotz draws from major globally published contact centre and customer service standards and current best practice from its ever-growing global base of licensed users.

The tool incorporates a powerful task management function to ensure that agreed improvement or remedial activities or actions identified during the assessment are carried by designated individuals or teams strictly in accordance with agreed priorities and deadlines.

Snapshotz reports provide an accurate representation of the current state of the operation (across over 800 checkpoints) and clearly indicates how the assessed contact centre compares to the aggregate scores of almost 3,000 contact centres across the world.

A typical Snapshotz assessment, audit and benchmarking engagement can take from three to five days on site and followed up by a half day executive or management feedback workshop in which we present detailed Observations, Findings, Benchmark Data and Recommendations.

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