

**MANAGING
YOUR
CALL CENTER**



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Welcome to the Telecorp Products Inc. family, servicing over 3,000 call centers worldwide. This handbook assumes that the reader has an Automatic Call Distribution (ACD) system and Telecorp's CentrEE Solution Suite. It is also assumed that the reader has basic operational skills concerning the reporting system.

Running a call center can be a complex business. The call center manager is charged with a wide array of business management issues. Besides performing the fundamental service the call center is providing; call center management must also coordinate staffing, call costs, facility costs and, in some instances, marketing and promotional materials and services costs.

Fundamentally, there are two types of call centers: cost centers and profit centers. Cost centers are call centers that do not directly produce revenue for the company and profit centers are call centers that do directly produce revenue for the company. In most cases, the cost center ACD environments are under funded and under staffed. Profit centers tend to be a higher profile operation within a company because these centers make money. In some cases, profit centers are the only source of revenue within the company. Catalog and telemarketing operations are examples of profit centers.

The array of different types of equipment and technology available for these facilities is enormous. It should be said that most call center managers never aspired to become telecom or computer gurus. Many insurance claim center managers, service contract managers, bank credit managers and so on, never in their lives expected to work with a digital electronic nightmare called an ACD system. In spite of this, their management often asks them to use and understand complex pieces of technology without being experts in this field.

It should be stated that setting up the system properly by the vendor is difficult. Hundreds of decisions must be made concerning system programming and feature implementation. Most customers that buy ACD systems don't really understand how the systems work or how dramatically the technology can impact their operation. Having said this, many customers will influence the ACD installation based on misunderstanding and prejudice. The vendor will install the system to satisfy these requests and compromise efficiencies in doing so.

Typically, the vendor is not totally ACD fluent and / or cannot make solid arguments that support proper configuration in the face of protest from the customer. Some vendors prefer that the customer remain in the dark, such that all options need not be explained. Some customers will require more education in ACD technology than can be provided within the available time frames. The

vendor then must make the decisions and explain later. Of course, later never comes and the customer is never trained properly.

Telecorp Products Inc. has worked closely with call centers around the world for over 15 years and we're still learning. This document provides methods and stories that illustrate call center management, the use of reporting information and a progression from where to start through the fine tuning of a call center. Some of the most common call center difficulties are discussed and we hope that our experience will help you and your call center.

Other Resources:

Call Center Management On Fast Forward: Succeeding In Today's Dynamic Inbound Environment

By: Brad Cleveland & Julia Mayben

Call Center Benchmarking (Deciding If Good Is Enough)

By: John Anton, David Gustin, Stijn Spit

**Chapter 1:
Call Center Basics**

Phone System Features for Automatic Call Distribution

Automatic Call Distribution has become a standard means employed by companies to answer inbound callers. A typical ACD has fewer people answering calls than the number of incoming calls. This allows the surplus callers to wait in queue until an answering person is available. Generally, there are fewer or a commensurate number of callers to answers. During busy periods, callers enter the system and wait in queue for short intervals before being answered.

The telephone system may be equipped with various ACD features. The following descriptions are common ACD features employed by call centers to help optimize call handling. These features are common to most ACD capable phone systems. The names of the features sometimes change from one manufacturer to the next but functionality is very similar.

Agent Information

ACD telephones differ from normal business telephones in that they have "flow control" capability. An ACD delivers callers to agents in automation. Therefore, the agent needs the ability to stop new calls from being delivered to his/her phone to accomplish standard work regimens. By pressing buttons (keys) on the ACD phone, the agent changes "state" to actuate the flow control.

For instance, an agent might be required to perform paper work after each call to finish a work order, enter information into a computer, look up information, or confer with a supervisor. A feature called the Not Ready key answers this need. The Not Ready key on the agent phone stops new calls from being presented to the agent telephone set. Not Ready is also called After Call Work State (ACW), Wrap Up and Post Call Processing (PCP).

When the agent leaves to go to lunch, the agent uses the Make Set Busy (MSB) key. This feature logs out the telephone. The ACD system no longer considers this station a viable answering point and will not until the agent logs back in. MSB is also called Out, Not In, LOGO and DEAC.

The key on the phone that actually receives the ACD calls looks like a standard telephone button. To log in, the agent depresses the ACD key, hears a special dial tone, and performs a log on procedure (dialing digits or pressing the ACD key twice). The ACD key cannot initiate out bound calling. In some phone systems, the ACD key, when depressed during a call, will hang up on the current caller and answer the next call in queue. Other features may be equipped such as Emergency keys, Call Supervisor key and the usual mix of business features (transfer,

conference). A high percentage of ACD phones have LCD or LED displays that show the agent alphanumerical information concerning the origin of the call, dialed digits and so on.

Logging Into the Telephone System

When an agent wants to receive ACD calls at their telephone, they must first log into the telephone system using the ACD key (Log In key). Depending on how the telephone system is programmed, there are two different methods an agent can use to log in. The first method uses a log in ID. When the agent wants to take ACD calls, they enter a number (usually four-digits). The telephone system then tracks their telephone activity according to that log in number. The other method uses a position ID. When the agent wants to take ACD calls, they hit their ACD key twice. The telephone system then tracks their telephone activity according to the position ID of the telephone that they used to log in. The major difference between the two methods is that log in IDs track the telephone activity of a number (which may appear at different telephone locations) and position IDs track the telephone activity of a particular telephone (regardless of who's using it). If your agents always sit at the same telephones, then the position ID method will track the telephone activity of the agents (because the activity of the telephone is always the same as the activity of the agent). If your agents ever sit at different telephones, then, in order to track the telephone activity of the agents correctly, the telephone system needs to be configured to use log in IDs.

ACD State

When the agent receives an ACD call, they are in the ACD state. The ACD time is the duration of the call. While in the ACD state, the call can be modified by transferring the caller to someone else, placing the call on hold, or setting up a conference. However, these modifications prolong the amount of time spent on an ACD call and reduce the number of ACD calls that can be received by an agent.

Not Ready State

Pressing the NRD key (Not-Ready, Post Call Processing, Wrap Up, After Call Work State) places the agent in the Not Ready state and stops the agent from receiving another ACD call. It turns the phone off to call flow, while leaving it statistically in the queue. Many call centers misuse the NRD key. The NRD key should be used only during an active ACD state. Specifically, Not-Ready is a valid ACD condition only when used during other work-related activities - customer callbacks, filing, research, any work that is generated by an ACD call. The NRD key is not to be used for agent break time of any sort. The first step towards realizing the efficiencies that ACD can provide begins with the disciplined use of the NRD key. Only after the NRD key is used properly will you

be able to generate accurate statistics about how your agents are spending their time.

Wait (for an ACD Call) State

The only thing that happens during ACD that has no bearing on how an ACD agent performs is how long they wait for a new ACD call. This time is dependent on how many agents are available and how many calls are being received. Wait time can help the call center manager add or remove agents to the queue and properly staff the call center.

Non-ACD State

When an agent is on a Non-ACD call, they are in the Non-ACD state. A Non-ACD call is a call that is either placed or received on one of an agent's extensions. Non-ACD calls include incoming, outgoing and internal calls that were placed from, or received at, an agent's extension.

Logging Out Of the Telephone System

The MSB key (Make Set Busy, Log Off, Quit System) is used when the agents leave the telephone system. The MSB key turns off the phone statistically to the telephone system. The agent will have to log on to resume operation. You will get real information about manned time and the PCP time in the process. Make set busy is used any time an agent takes a break, goes to a meeting, or works on a special project or side job.

Supervisor Information

The supervisor telephone has the same ACD functionality as the agent telephone and is fully capable of answering ACD calls from queue. Additional features allow the supervisor to monitor queue status and agent state. Agent keys show the "state" of the agent. These states include the following: ACD (DCP), Not Ready (PCP), Wait (a call has not yet arrived), Logged Out (unmanned), and Non- ACD (private line call).

Display Waiting Calls Key

When depressed, the Display Waiting Calls (DWC) key causes the telephone system to display, on the telephone set's LCD, the number of calls in queue, the oldest call in queue, and the number of manned stations in queue.

Manned Stations

The number of manned stations is the number of stations that have agents present. An agent is considered manned if they are logged into the telephone system and

able to take ACD or Non-ACD calls. When manned, agents can be in the Available, Not Ready, ACD, or Non-ACD states.

Calls in Queue

Calls in queue are the total number of calls waiting in queue to be answered.

Oldest Call in Queue

The oldest call in queue is the amount of time the oldest call received has been waiting to be answered.

Observe Agent Key

Observe agent allows the supervisor to listen in on an agent during calls for the purpose of monitoring etiquette, helping with problem calls and general training operations.

Night Service Key

The Night key allows the supervisor to stop new calls from entering queue and is used at the end of the workday as the name implies. Calls that are in queue at the time of activation remain there until answered.

Other feature keys may be assigned that include the Display Agent keys, the Call Agent key, and the Emergency key.

Periodic Reports

These reports include queue information concerning the number of calls, average speed of answer (ASA), telephone service factor (TSF), abandoned calls, recorded announcement hits, and agent information - number of calls per, time on calls, time in different states, etc. The periodic reports can also include trunk information (outside lines), overflows and interflows. Periodic reports contain the information that call center managers need to evaluate agents, analyze overall queue performance and make strategic plans.

Telephone Service Factor (TSF)

The telephone service factor is the average number of calls answered or abandoned that the queue has received. The time period can be specified by your telephone system.

Average Speed of Answer (ASA)

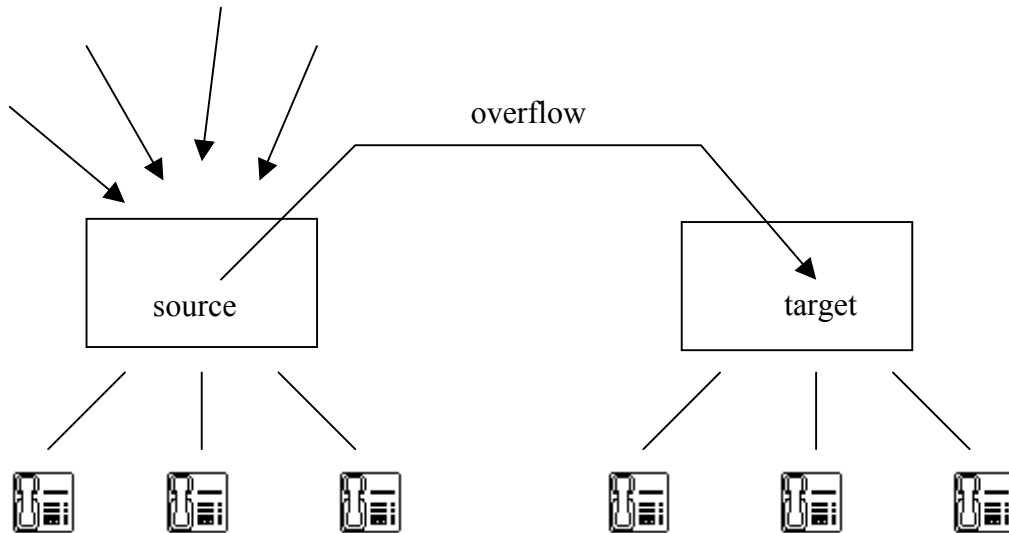
The average amount of time per ACD call that the customer waited before an agent answered the call.

Interflow and Overflow

Overflow is an automated system and a button on the supervisor's phone controls interflow. At a predetermined point calls begin to leave the original ACD queue and are directed to another answering group. The interflow button on the supervisor's phone turns this feature off and on manually.

Overflow

At some time, call center management may want excess calls to be sent to an alternate answering place to keep callers from waiting too long. When a call enters the intended queue, it has been placed in the source queue. The calls may be sent to another queue when the source queue gets too full. The new queue is called the target queue. New calls will be diverted to the target queue after a defined number (overflow threshold) of calls are in the source queue. This overflow threshold is user programmable. The target queue can also have an overflow threshold and send calls to yet another queue. Up to three target queues can be specified. Calls will not enter a target queue if the target's overflow threshold has already been exceeded.



Timed Overflow (TOF)

TOF is an overflow feature that times each call that enters queue. In this case, the overflow threshold is a time set by the user. At the predefined time, any existing call is sent to the target queue. Since abandonment (hang-ups) is usually based on a caller having waited too long, TOF is potentially the most valuable overflow feature. As an example, if the TOF timer is set at 30 seconds, any caller waiting over 30 seconds would be sent to the target.

When to Use Overflow

Overflow redirects excess call traffic that will abandon before being answered. Timed overflow is the only overflow feature that works consistent with customer habits to help you when you are in call handling trouble. Where the calls go (target queue) is the greatest concern for setting up overflow. Consider these three questions and answer yes to all of them to use overflow:

1. Can the target queue actually answer the questions of your callers or take call back numbers?
2. Can the target queue handle the volume of overflow you expect to send them?
3. Do you know the target queue supervisor by first name?

The agents in the target queue will require training and incentive just like your source queue. It will also require management just like your source queue. Treat it and the people in it lightly and you might as well hang up on your customers yourself.

Question number 2 speaks to how long your overflow experiment will work. If the target is not staffed to handle the calls, you will overwhelm them with "your work" and they soon will rebel. Call volumes always need to be monitored.

Question 3 speaks to your call center political environment. Are you the supervisor of both the source and target queues? If so, you can control things the way you want. If not, you have a serious problem. Most people in most companies are charged with specific duties. It is unlikely that your target queue supervisor is willing to process "your" calls for very long or maybe not at all. In many cases, they are competing for the company's resources to better staff and equip their own queues.

The Root Problem with Overflow

At one time or another, most ACD managers who do not fully understand ACD become frustrated with their ability to effect call handling. Overflows from one queue to another seem like a good idea. Redirecting calls to a third queue might

seem like a good idea too. The third queue might be programmed to send calls back to the first. In reality, nothing happens and calls are lost. This system does not process calls properly.

Interflow

Interflow is much like overflow except the supervisor telephone may be programmed with a button (key) that turns an overflow feature on and off. Once turned on by pressing the key, new calls will overflow to a target queue after the overflow threshold has been exceeded. Interflow is a great sales feature. To a prospective new customer, the vast automation of the new ACD when purchased and installed requires user controls. Now, instead of managing the ACD agents and helping to speed the processing of call traffic the ACD supervisor is charged with "riding the button". Now when callers enter an ACD system, they usually don't remain there unanswered for a minute or two. If the supervisor is distracted for longer than a minute or two, the call is lost.

There is a good application for interflow. Interflow is used when something unusual happens that causes the call center to be partially or fully shut down. Something like a computer failure that would keep agents from processing calls. In this case, the calls are sent to another location to be processed. This assumption holds that there are two or more locations processing calls. It also holds that the facilities are in place to handle the diverted traffic. Consider these three questions and answer yes to all of them to use interflow:

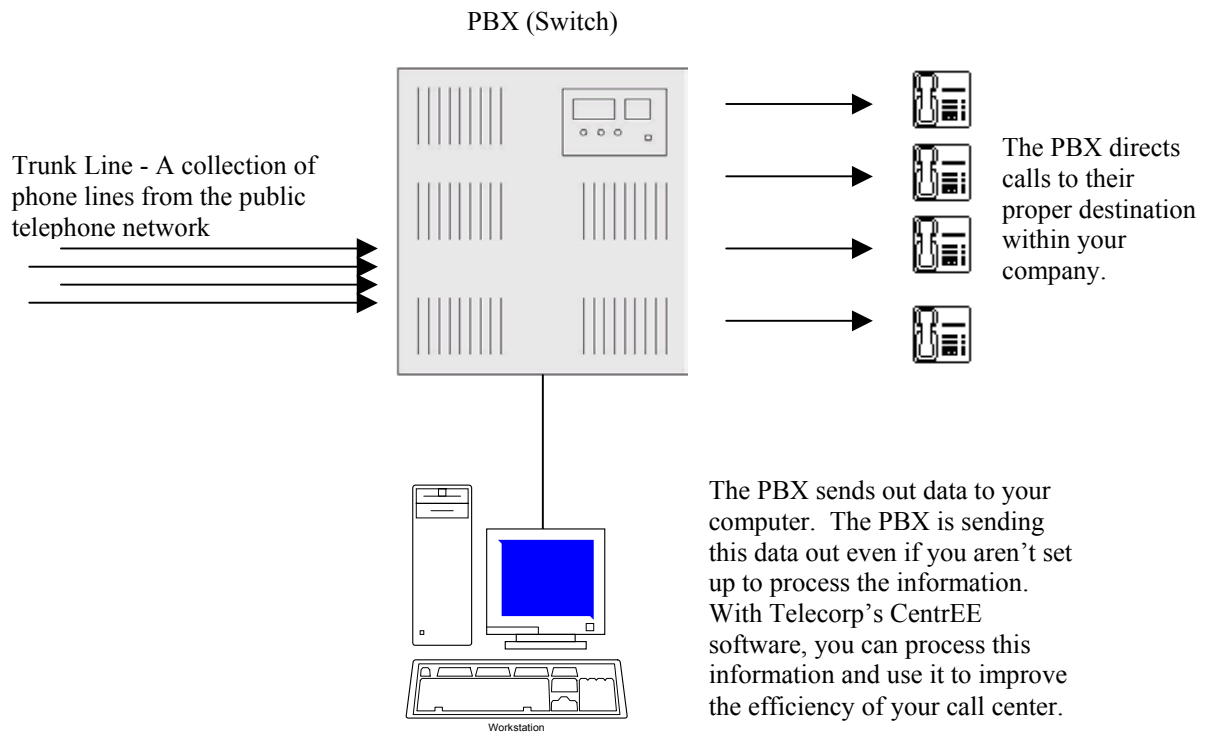
1. Can you send the calls somewhere else for answer?
2. Are they staffed there to handle your calls?
3. Is your call handling capacity drastically reduced or completely turned off by this disaster?

You are the expert at answering your calls. Don't send those calls to someone else to answer them. Build the resources in your staff and facilities to do the job. Consider interflow to be disaster recovery - only use it in an emergency situation.

How the Telephone System Directs Calls

The local telephone service provides trunk lines, collections of phone lines, for any center with a large number of phone lines. In smaller businesses, the trunk line can be routed through a receptionist's telephone to the rest of the business. In larger businesses, it is necessary to purchase a PBX (Switch) that routes the calls automatically. The PBX is essentially a large computer that replaces the switchboard operators of days past. Software can be purchased for the PBX that performs the function known as Automatic Call Distribution. The software that controls ACD also broadcasts information about call activity within the call

center. Telecorp's CentrEE Solution Suite is able to receive this information and produce accurate historical and real time reports for a call center.



Recorded Announcement (RAN)

The whole idea behind queuing is that callers wait until an agent is available. If a caller were to hear 20 rings and not get answered, it is likely that they would hang up. Queuing provides a psychological progression toward being answered for the calling party. One of the most powerful psychological tools for the call center is occupying the caller's attention and making them feel that communication with a real person is imminent. Typically, employing simple recorded announcements can double wait times before callers abandon. Many multiple RAN schemes are available. Some integrated voice response (IVR) products include menuing and voice mail type applications.

Basic RAN is defined by queue and invoked by the incoming caller. Options include immediate answer, answer after a timed threshold, a second announcement after a second timed threshold and repeated second announcement after the repeated expiration of the second timed threshold. In this way, call centers can prolong the period of time that people will wait before "giving up"

and answer a higher percentage of the callers. A typical sequence might play out as follows:

| | |
|---------|--|
| timer 1 | 15 seconds |
| (T1) | "Thank you for waiting. One of our specialists will be with you shortly. Please wait and your call will be answered in the order it was received." |
| message | |
| timer 2 | 40 seconds after T1 |
| (T2) | "Sorry to keep you waiting. Your call is very important to us. Please stay on the line and a specialist will be with you in just a moment." |
| message | |

Some companies provide music or canned advertisement in between the RANs. This typically allows the call center to lengthen the intervals between RANs. Some IVR applications allow the caller to opt for leaving a voice mail message, listen to product information or "tone out" to a different department.

Phones Don't Answer Calls - People Answer Calls

The reality is that a phone system with the latest technology and features cannot answer a single call. Only one thing in a phone system can answer calls: people. What about voice mail? What about automatic attendants? What about voice response units? These systems can be implemented in some cases to actually handle calls and provide or take information from callers about the products and services they seek. This road is fraught with problems and difficult to implement successfully. This technology works and works well if used well. It will never take the place of people. It has the ability to minimize the number of people needed to do the job. In the vast majority of call centers, this is a good thing due to the fact that most call centers are under staffed. Any way that you look at the problem, under-staffing the call center is a fast way to destroy customer service.

Chapter 2: Defining Goals

Service Objective

The reason for having an ACD system is to provide a service for someone. That someone can be customers or even people within your own company. We'll treat them all as customers. The goal of ACD is to answer the call as fast as possible, while providing the highest level of customer service that you can. The person in queue is the priority of a call center.

Determining a service objective should be based upon the environment of the call center. Caller tolerance and satisfaction levels are specific to the call center industry area and to the individual caller. The options available to a caller are important to consider while determining your goals. If a caller can't reach you by phone, are they more likely to go to your website or call your competitor? A help desk call center may want to place more focus on the quality of service rather than the quantity of people they can process. If the help desk call center also has a website available for support, the abandonment rate could reflect people who decide that they would rather go on-line. Providing a customer with fax, Internet, and call center options may increase call center abandonment rates but also increase customer satisfaction. For a sales call center with no other means of taking orders, any abandoned call would likely be a lost sale. Customer tolerance can be based on anything from the type of day the customer is having to their expectations of a specific industry. A person calling a government agency may expect to wait 10 minutes for a representative and be happy to get through in 5 minutes; while, a person making a catalog order may abandon in disgust after two minutes. A call center manager must understand their customers and set goals according to their specific industry and the expectations of upper management.

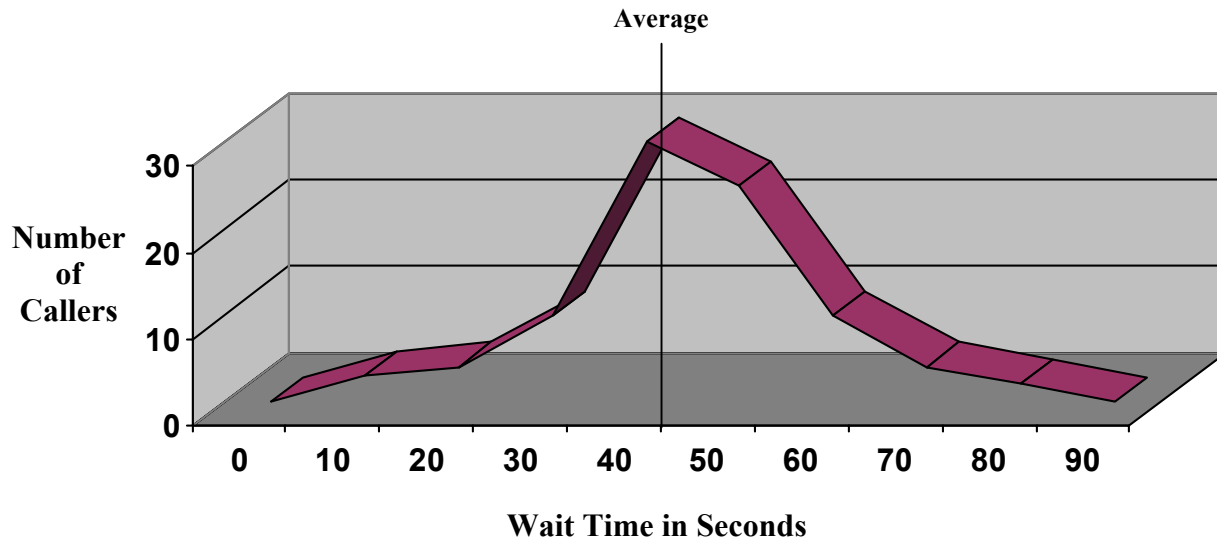
Abandonment Rate

The abandonment rate has been a popular standard for call centers but it should be looked at in the proper perspective. Abandonment times can vary widely based on different times of the day, promotions, caller tolerance, and industry. Callers are willing to wait on phone lines much longer during special promotions and in situations where they have no other choice. Or, rather than waiting on the phone, the customer may choose another form of communication that will benefit the company and free up more call center agents in the process. Most importantly, abandonment rates don't consider the ease of use- time spent in queue- for your customers.

Average Speed of Answer

The Average Speed of Answer (ASA) is a "reading" of the efficiency of a call center. The average is what you work with statistically. You can have an average

wait time before reaching an agent of 40 seconds but have a caller who waited 85 seconds before reaching an agent as well as one that reached an agent after only 10 seconds. The graph represents a hypothetical ASA for a call center as follows:



In the previous graph the average wait time before reaching an agent is about 40 seconds. Approximately 30 to 35 callers actually spoke to agents at the average wait time of 40 seconds. About 5 callers waited as long as 60 seconds. Also, 1 or 2 callers were answered within the first ten seconds. The ASA is a mathematical guideline that doesn't give a call center manager the whole picture of what's happening to their customers.

Telephone Service Factor

The Telephone Service Factor (TSF) is the most accurate and inclusive way to calculate a call center's efficiency level. The TSF is the percentage of calls answered in (x) seconds. There are a few different equations that can be use to calculate TSF. The most informative is as follows:

$$\frac{\text{Calls Answered and Calls Abandoned in X Seconds}}{\text{Calls Answered and Calls Abandoned}}$$

The previous equation contains the necessary information for a call center manager to understand both the volume and efficiency of call center calls. TSF is the best indicator of what happens to all call center customers. With this information, a call center manager can understand what their customers experience while in queue and set goals according to the specific call center industry.

Forecasting Call Volume

Forecasting allows a call center manager to identify patterns and calculate for exceptions to those patterns. The goal of forecasting is to put the right people in the right place at the right time. Forecasting call load is broken down into three main divisions: monthly forecasting, daily forecasting, and hourly forecasting. To forecast correctly, it is important to work with exact data from your ACD center. With accurate forecasts, staffing levels and other resources can be based on realistic expectations.

Call Volume Examples:

To determine the total calls for next year, use the total call volume for the current year multiplied by the companies expected growth rate.

| | |
|---------------|---|
| 100,000 | Current year's calls |
| <u>x 1.10</u> | Ten percent expected increase |
| 110,000 | Estimated calls in forecast year |

To determine the calls for a specific month of the year, find the current year percentage of call volume for that month.

| | |
|-----------------|---|
| 10,000 | January's calls |
| <u>/100,000</u> | Current year's calls |
| 10% | January's percentage of total year's calls |

Now, multiply the forecast year's estimated calls by the current month percentage.

| | |
|---------------|--|
| 110,000 | Estimated calls in forecast year |
| <u>x 0.10</u> | January's percentage of total year's calls |
| 11,000 | January's forecasted calls |

To determine the average number of calls per day, divide the number of days that your call center will operate in the specific month by the number of forecasted calls for that month.

| | |
|-------------|---|
| 11,000 | January's forecasted calls |
| <u>/ 25</u> | Days in operation |
| 440 | Average forecasted calls per day |

To determine the number of calls for a specific day, the index factor of that day must first be established. To find this index, divide the proportion of calls

received on the specific day (from looking at previous traffic patterns) by the proportion of the week the day represents.

$$\begin{array}{r} .25 \quad \text{Monday normally receives 25\% of the weekly traffic} \\ / \underline{.20} \quad \text{Monday represents 1/5 of the work week (M-F)} \\ 1.25 \quad \textbf{Monday's index factor} \end{array}$$

Now, multiply the index factor by the average calls per day. This will produce Monday's average calls.

$$\begin{array}{r} 440 \quad \text{Average calls per day} \\ \times \underline{1.25} \quad \text{Monday's index factor} \\ 550 \quad \textbf{Monday's forecasted average calls} \end{array}$$

To find the ½ hour forecasted calls, multiply the proportion of calls received during a specific ½ hour time frame (from looking at previous traffic reports) by Monday's average calls.

$$\begin{array}{r} 550 \quad \text{Monday's average calls} \\ \times \underline{.2} \quad \text{12:00 to 12:30 percentage of calls received (20\%)} \\ 110 \quad \textbf{Forecasted calls 12:00 to 12:30} \end{array}$$

Establishing Call Processing Times

Call processing times are one of the basic tools used by call center managers to evaluate call center performance. This information can be used to determine the proper emphasis to place on customer service and post call processing. Also, a general manager can use these numbers to reduce overall post call processing times and target specific agents that deviate from the norm in both post call processing and direct call processing times. Understanding call processing times allows a call center to target and improve specific areas of call processing.

Call Processing Examples:

| | |
|-------------------|-------------------------------------|
| Minutes / Seconds | Call Profile |
| 2:45 165 | Duration of ACD Call |
| + 0:45 45 | Duration of Post Call Work Per Call |
| 3:30 210 | Total call handling time |

| | |
|-------------------|-----------------------------------|
| Minutes / Seconds | Agent Time |
| 14 | Number of Agents |
| x 45 2700 | Total Manned Time Per Hour |
| 630 37800 | Total Agent Manned Minutes |

Determining Staffing Requirements

Scheduling employees becomes a call center issue when different shifts occur. Several factors make a scheduling system a good choice. A good scheduling package will take the historical information from your reporting system and allow you to project how many agents you will need in the future with amazing accuracy. You can change the call volume and agent efficiency and model how many agents you will need to reach desired performance levels. Scheduling systems allow the manpower used to manually build schedules to be returned to call processing. In medium to large call centers, scheduling systems are usually justifiable by paying for themselves in very short periods. The following is an example of the What If calculator from Telecorp's Rapid E-Port:

| Agents | % T.S.F. | % of Calls In Queue | % of Calls Abandoned | % Agent Occupied | A.S.A. of All Calls | A.S.A. of Calls in Queue |
|--------|----------|---------------------|----------------------|------------------|---------------------|--------------------------|
| 13 | 99.25% | 2.15% | 0.09% | 51.28% | 00 min. 00 sec. | 00 min. 19 sec. |
| 12 | 98.12% | 4.58% | 0.32% | 55.56% | 00 min. 01 sec. | 00 min. 23 sec. |
| 11 | 95.53% | 9.20% | 1.05% | 60.61% | 00 min. 03 sec. | 00 min. 28 sec. |
| 10 | 89.98% | 17.46% | 3.30% | 66.67% | 00 min. 06 sec. | 00 min. 36 sec. |
| 9 | 78.77% | 31.33% | 9.75% | 74.07% | 00 min. 16 sec. | 00 min. 51 sec. |
| 8 | 57.35% | 53.27% | 27.35% | 83.33% | 00 min. 48 sec. | 01 min. 30 sec. |
| 7 | 18.54% | 86.11% | 72.89% | 95.24% | 05 min. 10 sec. | 06 min. 00 sec. |

How to Resolve Understaffing at the Lunch Hour

Many companies do not allow personal calls during working hours. Break time (10:00, 12:00 to 1:00 and at 3:00) is the only chance for many people make their calls. Many call centers let half of their staff go to lunch at noon. Often, the call center's peak traffic period is also at noon. This information can be shown to the agents and a new system can be put in place. Schedule lunch breaks starting at 11:00, 11:15 and in fifteen-minute increments through 1:30. Let agents who do not take lunch breaks out an hour early. Ask the agents for suggestions.

Increasing the Accuracy of Statistics

Often, a call center's staffing information is not accurate and this inaccuracy leads to deceiving statistics. Many times, this is due to confusion about the proper use of the agent telephone. In many cases, when agents leave for lunch and go on breaks, they are not using the Make-Set-Busy key. They just push the Not-Ready key and leave their desks. The system thinks they are still logged in and doing paper work. Therefore, a call center manager has no useful information about staffing until the agents are properly using the telephone system. Consider the example as follows:

1:00 Abandonment Period

A call center that lets its agents (all or many) go to lunch together may leave the queue understaffed. If the agents are using the NRD key while they are on a lunch break, the telephone system won't detect the drop in staff.

5:00 Abandonment Period

While a call center's traffic is slowing down, the agents are getting ready to leave work. Shortly before 5:00 many agents begin to leave their workstations and use the NRD key. A few actually log off. The customers in queue stack up and abandon their calls.

After the agents have been informed how to properly use the MSB (during lunch and other breaks) and NRD (during call related work) keys, the call center manager should randomly ask agents that are away from their desks if they have logged off. The agents will take a few days to develop the good work habit of using the MSB key whenever they leave their desks. Accurate statistics regarding agent activity can now be evaluated.

ACD Key - Ratcheting

Besides logging an agent into the telephone system, the ACD key on the telephone (In Calls key) performs another function - it disconnects calls. If an

agent were to press the ACD key while talking to a customer, the agent would hang up on the current caller and take the next call. If an agent were to press the ACD key ten times in a row, they would empty five callers from queue and hang up on them in rapid succession. This abuse is called "ratcheting". Ratcheting gives the ACD agent a high number of calls taken on a report. The calls will exhibit short duration. If an agent is intelligent about how he/she does it, it may be difficult to track. Warning signs that ratcheting may be taking place at your call center are as follows:

1. Customers complain about waiting in queue only to be "disconnected" or "cut off" by the system.
2. An agent's statistics jump from one level of calls answered to another.
3. The same agent's statistics show a simultaneous and substantial drop in call processing time.

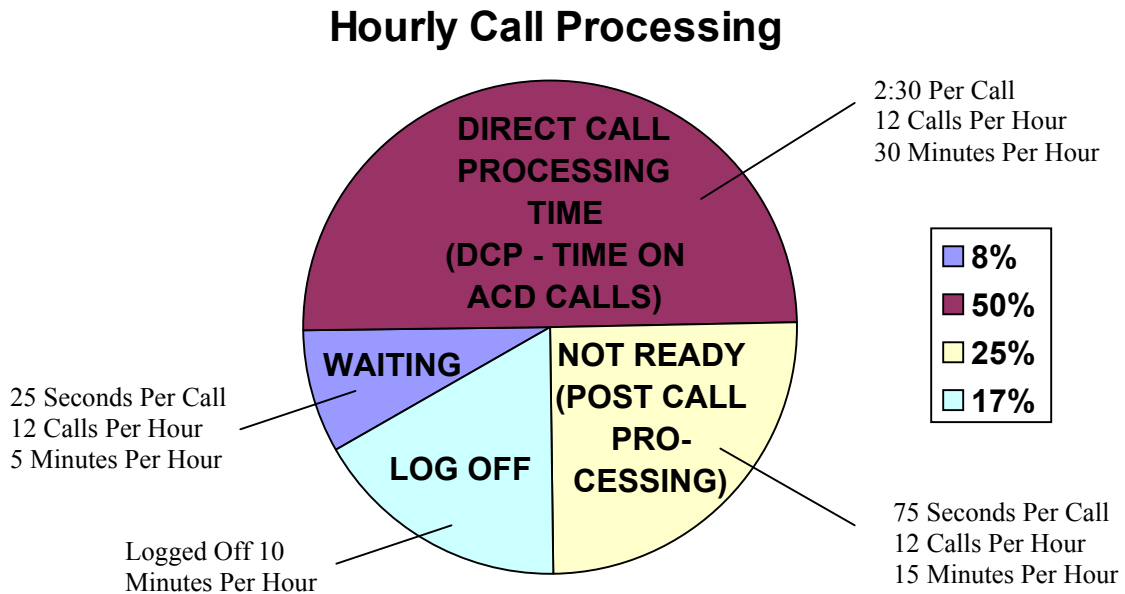
Chapter 3: Tuning the Call Center

New Levels of Performance

The "gross adjust" part of coming to terms with call center management is completed. Basic call center operation is under control and further efficiencies can now be implemented. The operations have been performed as follows:

1. Determined Service Objective
2. Determined Call Volume
3. Determined Call Handling Times
4. Determined Staffing Requirements
5. Increased the Accuracy of the Statistics

With these performance levels established, a course can now be plotted to new levels of performance.



Use the "Your Pie Of Time" worksheet in the back of this document to evaluate your call center. Draw this pie chart for your call center. Your numbers are not likely to look like these hypothetical numbers. Call center management can impact all of these percentages.

Increasing Agent Productivity

Overall call handling capacity can be greatly impacted through small changes at the individual agent level. The examples in this section describe simple changes that can be implemented in a call center to increase call handling capacity. The examples don't take all of the real life variables that determine staffing need into account but clearly demonstrate the impact of how small changes at the agent level impact total call handling capacity. The following example illustrates the impact of changing allotted time:

| | | |
|---|-----------|--------------------|
| A call center that has 10 agents logged in. | 10 agents | 100% staff |
| Two agents get up and take a break. | 2 agents | <u>- 20% staff</u> |
| | | 80% staff |

In the previous example, the agents handle 10 calls each per hour. Two agents are gone now. The call center can now handle only 80 calls as opposed to 100 calls before the two agents took a break. The call center is down 20% of its call handling capacity.

How Many Calls Can an Agent Take?

Assume a call center receives 100 calls per hour.
 Assume the call center has 10 agents.
 Assume the agents are logged in for 45 minutes per hour.
 Assume the agents use 3:30 on each call.
 Assume the agents use 1:30 on post call processing.

$$3:30 + 1:30 = 5:00 \text{ Per Call}$$

| | |
|-------------------|---------------------------|
| Minutes Logged In | 45 minutes logged in |
| Minutes Per Call | <u>5 minutes per call</u> |
| | 9 Calls Per Agent / Hour |

How Many Agents Do We Need?

| | |
|-----------------|--------------------------|
| Total Calls | 100 calls per hour |
| Calls Per Agent | <u>9 calls per agent</u> |
| | 11.1 Agents Needed |

The call center needs 11.1 agents to handle the traffic load.

A Few Incremental Changes:

A call center can decrease the number of agents it needs with a few modifications to the work schedule. In the following example, the agent break time is reduced from 15 minutes per hour to 10 minutes per hour.

$$\begin{array}{r} \text{Minutes Logged In} \qquad \qquad \qquad 50 \text{ minutes logged in} \\ \text{Minutes Per Call} \qquad \qquad \qquad \underline{\quad / \quad 5 \text{ minutes per call}} \\ \qquad \qquad \qquad \qquad \qquad \qquad \qquad \qquad 10 \text{ Calls Per Agent / Hour} \end{array}$$

$$\begin{array}{r} \text{Total Calls} \qquad \qquad \qquad 100 \text{ calls per hour} \\ \text{Calls Per Agent} \qquad \qquad \qquad \underline{\quad / \quad 10 \text{ calls per agent}} \\ \qquad \qquad \qquad \qquad \qquad \qquad \qquad \qquad 10 \text{ Agents Needed} \end{array}$$

Staffing need has been decreased from 11.1 to 10 agents or call handling capacity has been increased by 10%.

In the following example, post call work is decreased by 30 seconds per call.

$$\begin{array}{r} \text{Minutes Logged In} \qquad \qquad \qquad 50 \text{ minutes logged in} \\ \text{Minutes Per Call} \qquad \qquad \qquad \underline{\quad / \quad 4:30 \text{ per call}} \\ \qquad \qquad \qquad \qquad \qquad \qquad \qquad \qquad 11.1 \text{ Calls Per Agent / Hour} \end{array}$$

$$\begin{array}{r} \text{Calls} \qquad \qquad \qquad 100 \text{ calls per hour} \\ \text{Calls Per Agent} \qquad \qquad \qquad \underline{\quad / \quad 11.1 \text{ calls per agent}} \\ \qquad \qquad \qquad \qquad \qquad \qquad \qquad \qquad 9 \text{ Agents Needed} \end{array}$$

Staffing need has been decreased from 10 to 9 agents. This is another 10% increase in call handling capacity. Overall, the call center has implemented a twenty percent increase in call handling capacity or a twenty percent cut in staff.

Not Ready - PCP - How To Minimize It

Post call processing is the single greatest time eater in most call centers. Now that misuse of the NRD key when agents are on break has ended, the call center's PCP time is accurate. However, it is often the case that agents use PCP time when they don't want to take another call. Agents will press the NRD key and engage in busy work in order not to take another call.

To control this problem, print out a report for a week or more. Compare the agents who use the least amount of PCP time with those who use the most PCP time. Evaluate the reason the times are different. If you can't find an explanation, then discuss the situation with the agent. If the agent can't answer for the time

either, then spend an hour with them as they answer calls. Perhaps, you can help them or see the reason they need to use more PCP time. Discuss a model hour, and then make it the standard for the call center. There are always real gains to be made by simply asking the agents how to minimize PCP time. They usually will come forth with a litany of PCP waste and clumsiness.

Automation

Some companies require a fair amount of PCP time for each call. This is usually due to paper work of some kind that is generated by the call. In these cases, the only relief you can expect is for the company to automate. Agents have computer terminal on each desk with access to databases. These systems may not entirely remove PCP time from each call but they should be designed to minimize it. Automating the company may be very expensive and time consuming. It may be cheaper to just hire more people to answer the phones. However, this is a short-term approach and does not fix the problem.

Computer / Telephone Integration (CIT - CTI)

The nicest systems use the callers I.D. to do a database access and deliver the call with a "screen pop" to the agent. The agent receives the call with the appropriate customer data screen already on their terminal. This is called Computer / Telephone Integration (CTI-CIT).

Scripting - Reduce the Length of ACD Calls

A call center can reduce ACD time by requiring agents to work from a script that is easily memorized. It can be prompted on screen, in your customer data base system, or on paper. It should appear friendly and intuitive. It will have at least three parts or "roles" to be played. You can develop it yourself or hire a scripting company to write one for you. The script will level the playing field for the agents as it pertains to the amount of time spent on ACD calls.

Greeting

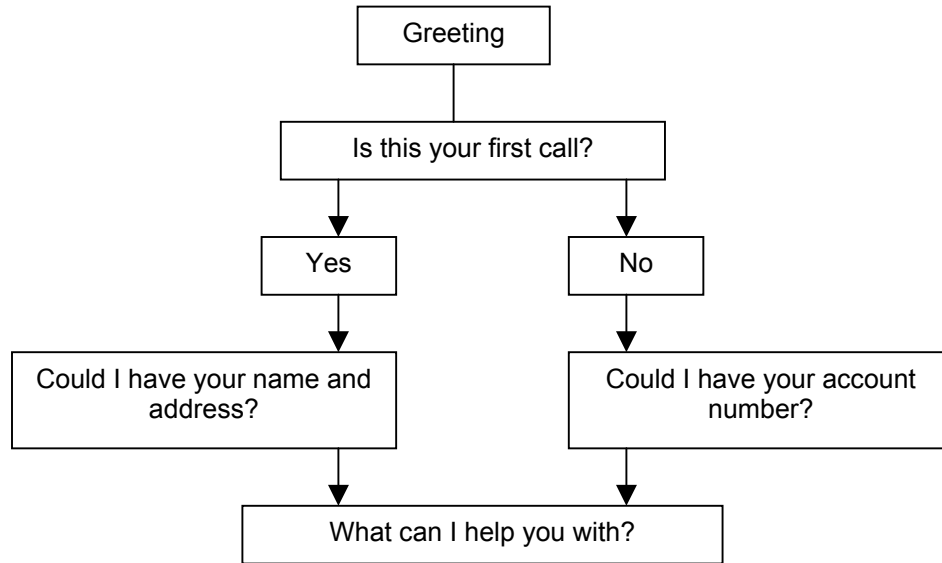
Your script opens with the greeting that your agents will give the customers. The greeting needs to state the business name, what department the customer has reached, and a friendly opening to engage the customer.

Initial Information Getting

Now the agent must determine the following:

1. Who is the customer?
2. Why are they calling?

These two questions usually develop into a series of questions for specific information getting. In the case of help desk operations or technical support queues, the information getting is lengthy and highly developed. Catalog operations assume that the customer has a catalog and has decided to buy. The information getting is simple: product I.D. codes and billing info. The following is an example of a basic flow chart for scripting from a brokerage firm.



A call center manager must determine what information your agents need to garner from the customer. Make sure that as much information as possible is available to the agent for solving problems. Draw a flow chart like the one above with all of the likely variations.

Asking for several pieces of information at one time can eliminate steps. This was done in the previous example by asking for name and address at once instead of asking for name, then asking for the address. Normal conversation has pauses for inflection and etiquette. If you ask someone for their name, there will be a pause of about one second before they begin to respond. Not because they had to think of their name, but because it is natural to allow a normal cadence of prompt and response in our conversational dialog. The following dialog illustrates this point:

| | | |
|-----------|------------------------------------|------------------------|
| Agent: | Good morning XYZ Products. (Pause) | 8 syllables 1 pause |
| Agent: | May I ask your name? (Pause) | 5 syllables 1 pause |
| Customer: | My name is John Smith. (Pause) | 5 syllables 1 pause |

| | | |
|-----------|---|--------------------------|
| Agent: | May I have your name and address? (Pause) | 6 syllables 1 pause |
| Customer: | My address is 12345 Sunny Lane. (Pause) | 13 syllables 1 pause |
| | Burbank, California (Pause) 99887. | 11 syllables 1 pause |
| Total : | | 48 syllables 6 pauses |

The following is a revised dialog:

| | | |
|-----------|---|--------------------------|
| Agent: | Good Morning, XYZ Products, may I ask your name and address? (Pause) | 16 syllables 1 pause |
| Customer: | My name is John Smith and I live at 12345 Sunny Lane (Pause) Burbank California (Pause) 99887 | 19 syllables 2 pauses |
| Total: | | 35 syllables 3 pauses |

The same dialog was roughly carried out in both of the preceding examples. In the second example, the syllable count is down by 13, the pause count by 3. Each pause is roughly worth 1 second.

Assume the following:

5 Seconds Per call Savings
 200 Calls Per Hour
 3 Minutes Per Average Call
 8 Hour Business Day
 1600 Calls Per Day
 50 Minutes Per Hour Manned Time
 16 Calls Per Agent Hour
 15 Agents

1600 Calls
x 5 Seconds Per Call Savings
 8000 Call Seconds Saved

8000 Call Seconds Saved

/ 60 Seconds Per Minute

133 Manned Minutes Saved

/ 8 Hours Per Day

16.6 Minutes Per Hour Saved

/ 3 Minutes Per Call

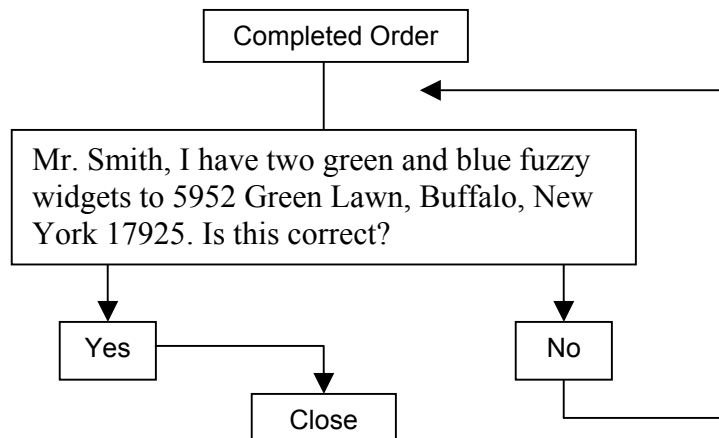
5.5 Additional Calls Per Hour = 2.75%.

The increase in throughput (call handling capacity) is 5.5 calls per hour. This is roughly 2.75%. All this added efficiency from changing the information getting of a very simple call. If similar gains from the rest of the call are realized, a 5% to 10% increase in throughput can be realized just by analyzing what we say and how we prompt the customer.

Scripting creates additional savings in how long it takes you to train new people when they come on board. You can give them a script, along with a knowledgeable viewpoint, that removes the whole conversational aspect of the call center. Furthermore, scripting helps to improve the accuracy of information exchange. It assures that the right questions are always asked and the right information is always given.

Information Giving

Here is a call center's largest potential saving. Controlling what and how to deliver information to a customer is easier than controlling how a customer gives the agent information. It is also where, unchecked, the agents have a tendency to chat with customers. With a script, the call center has a measured, consistent response to most situations. Here's a simple information giving script for a sales order house:



Of course, the information giving varies widely based on application. The previous example was easy to illustrate and few companies will have information giving segments as brief as the illustration. Thus, the potential gains are larger. Significant savings in agent time are available to call center managers that use scripting to optimize what is being said in the call center and how it is being said.

Close

The close is the last chance to impart a sense of good will and customer service to your customer. The close of the call should include something personable but not sentimental. The close should not prompt the customer to start asking questions about the product or service you offer. In the close, the agent should not ask questions - the time for getting information has past.

Reducing Idle Conversation

Many customers and some agents enjoy idle conversation. They get a listener on the phone and they go directly into chat mode. And they will go as long as they can. Any time the customer (or your agent) is left to ramble on, you lose. Only if a customer is angry should they be allowed to chat with your agent.

One of the best pieces of information that the marketing department can get from a caller in a sales environment is how they got your number. There's a right way and a wrong way. If you ask the customer how they found out about your company, you can trigger a long explanation. "Well, one day I was out for a drive. It was a very nice day and I was off of work, so..." It takes discipline to control the caller. Interrupting a customer in full chat mode can be done politely by acting like the caller needs to give one more, small piece of information. Ask, "Oops, I erased your zip code. I'm sorry, could you give me that again?" As soon as they give it, start the close before they go back into chat mode. Be creative.

Customer Data Bases

One of the most notorious time wasters is asking the customer for account numbers and having no way to look up the number (no database). In this case, if the customer does not know their account number, the agent responds, "We will not be able to service your account without the account number". The customer responds, "I'm the XYZ Company, we've done business with you for four millennia. I don't know the account number". "I'm sorry sir, we can't process". This produces an angry customer and is a waste of time.

The agent could have tapped into a data base or found the customer in a phone book size list and pulled the customer account number in half the time it took to argue with the customer. It should be incumbent upon the agent to help the

customer. If the agent cannot access such information, you might consider pre-call recordings that condition the callers to have the necessary information ready.

Non-ACD Calls

If the agents must generate a call for every inbound call they receive, non-ACD calls are necessary. One option is to save the callbacks for slow traffic periods. Another option is to assign specific people to perform all callbacks. Once again, the callbacks can be scripted. The timesaving for a non-ACD call is in the control of abuse. Most call centers do not require callbacks. So, any non-ACD calls are either research or abuse. It's usually pretty easy to separate the two by watching the duration of the non-ACD calls. Once again, the easiest way is to look at the call center reports and watch how many non-ACD calls your better agents are making. Compare this to the poorer performers.

Monitoring Calls

The supervisor phone, among its various ACD capabilities has the ability to perform agent observations. This is the ability to listen in on agents as they talk on the phone. This ability is either viewed as a way to gauge agent telephone etiquette or as an invasion of privacy. Agent observation is the only way to grade an agent on their actual call-handling abilities.

Privacy issues are important to consider. The observe function can be used to spy on people. Observation has become enough of an issue for several states to pass laws that require observing companies to tell agents that observation will occur at their hiring. Some states require that observation notices are published in the phone book along with the company phone number.

Your phone system can be programmed to allow or disallow the "warning tone". This is a beep tone heard by the agent that is being observed every few seconds. The customer does not hear the tone. Warning tones should always be allowed. This allows for a policy of trust between management and staff.

Everyone in the call center should share the monitoring of calls. People respond differently to being judged by their peers. A weak agent can learn from listening in on a star performer, then trying to emulate their performance. The agents can help identify problem situations and fine tune scripting.

Monitoring calls should always be carried out with a check off type of form so that an observer can grade the various points of the call. This form should at least contain a check box for "good" and "not so good" for every facet of the call. The following is an example of an evaluation form from Telecorp's Total E-Call:

Total E-Call (AWN), Eval

Lary Bowman | Default Form #1 | 10/05/2000 12:44PM | Key 52

Maintaining a rapport with the customer

| | | | | | | | | | | | |
|--|------|---|---|---|---|---|---|---|---|---|---|
| Greeted customer and correctly identified themselves | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Spoke clearly | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Asked probing and insightful questions | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Was attentive and did not interrupt the customer | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Showed interest and concern | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |

Providing a solution

| | | | | | | | | | | | |
|--|------|---|---|---|---|---|---|---|---|---|---|
| Gathered complete information from the customer | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Understood the customer and identified the problem | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Followed procedures | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Asked probing and insightful questions | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Gave a clear and concise response | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |

Customer perception

| | | | | | | | | | | | |
|--------------------------------|------|---|---|---|---|---|---|---|---|---|---|
| Didn't feel rushed | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Confident with given solution | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Customer understood the answer | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |

Closing

| | | | | | | | | | | | |
|--------------------------------------|------|---|---|---|---|---|---|---|---|---|---|
| Summarized call | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Gave a correct resolution time frame | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Thanked customer | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |
| Used standard closing | 10/5 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | X |

Real Audio Status information | Voice File Length | Agent and Time Stamp | **Voice**

Database Path: \ | 1 Records | Version 3.0.0.4

Default Evaluation Form

Forms | Save | Agents | Exit | DB Options | Reports | Delete

Wall Display Boards

Working in a call center where an agent can make decisions based on real data gives the individual input. The agents can affect each other by addressing the wall display board. There is no way to develop peer achievement pressure without letting them in on the data surrounding call center management. If the agents see what is happening and are charged with fixing it, managing the agents can be automatic.

Manned Stations

Manned station displays how many agents are currently logged into the telephone system. Providing this information allows agents to determine when it is appropriate to take a break. Establish guidelines for the minimum number of agents that must be present at certain times of the day. Take the guesswork out of agent break time.

Oldest Call in Queue

By displaying the oldest call in queue, the agents can determine the efficiency of the call center and make decisions accordingly. If a call center's average wait time before abandonment is 52 seconds, more agents can log into the telephone system if calls are starting to reach 45 seconds.

Calls in Queue

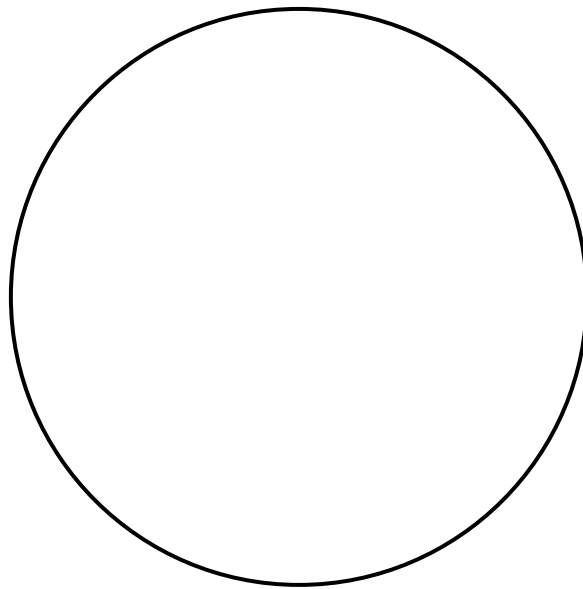
By displaying the number of calls in queue, the agents can judge the activity of the call center compared to the manned stations. If 10 new calls pop into queue, within 52 seconds some calls will be lost. Some more agents can quickly log in and save the calls.

Providing Information to Employees

At the installation of a system, some people are truly shocked to see how poorly the ACD is doing. They thought they were doing a decent job. Their bosses thought they were doing a decent job. The new reporting system poses a threat to the perceived value of the current supervisory staff.

Once past this type of crisis, all statistics should be shared with the agents. They should know how their efforts are paying off in providing the best customer service available. They will make group decisions to help a poorly performing employee get with the program. Now, a call center manager has many different imaginations working on solutions and everyone "sees" what impacts the call center.

Hourly Call Processing:



Use an average busy time in your call center to fill in the numbers below and draw in your pie above.

| | Seconds | Percent |
|-----------------------|---------|---------|
| DCP Time Per Call | _____ | _____ |
| PCP Time Per Call | _____ | _____ |
| Waiting Time Per Call | _____ | _____ |
| Manned Time Per Hour | _____ | _____ |

Number Of Calls Per Hour _____
Abandoned Calls Per Hour _____
Average Wait Before Abandonment _____
Average Speed Of Answer _____
Telephone Service Factor _____

ACD Performance Reporting Terms and Definitions

There are four different types of information on the telephone activity of your call center: Agent data, Queue data, CDN data and Trunk data. A data item (such as Accepted Calls) that appears in a Queue report can be defined differently in a CDN report or in a Trunk report.

Abandoned Calls (CDNs)

The number of calls accepted into the CDN, but abandoned before being answered through the controlled operation or routed according to the CDN's script.

Abandoned Calls (Queues)

An incoming ACD call is counted as abandoned when the caller hangs up before the call is answered by an agent or before the call is routed off-site. The sum includes calls that abandon while waiting for an agent to answer the call at his/her telephone. Calls that abandon while in the Timed Overflow (TOF) queue are counted against the ACD queue that initiated the overflow.

Abandoned Trunk Calls Before Threshold

A peg count of Calls Abandoned that shows how many calls were abandoned before the threshold time is reached. The threshold time is set in the telephone system for the ACD queue where a trunk route terminates. Do not try to relate these numbers to the numbers of Calls Abandoned in the Queue reports. The number of Call Abandoned in the Queue reports can include Abandoned Calls other than the Abandoned Trunk Calls (such as Overflowed Abandoned, etc.).

Abandoned Trunk Calls After Threshold

A peg count of Calls Abandoned that shows how many calls were abandoned after the threshold time is reached. The threshold time is set in the telephone system for the ACD queue where a trunk route terminates. Do not try to relate these numbers to the numbers of Calls Abandoned in the Queue reports. The number of Call Abandoned in the Queue reports can include Abandoned Calls other than the Abandoned Trunk Calls (such as Overflowed Abandoned, etc.).

Accepted Calls (CDNs)

The number of calls that entered the CDN and were routed by the telephone system according to the Enhanced ACD Routing script. The number of Accepted Calls for the CDN is equal to the number of Calls Answered plus the number

Abandoned plus the number Routed to the CDN plus the number Disconnected plus the number Busy plus the number Defaulted to this CDN.

Accepted Calls (Queues)

The number of calls placed in this ACD queue, including any Overflow by Number calls from another ACD queue. Timed Overflow calls from another ACD queue are not included. The number is based on the following:

If a call is Night Forwarded, it is counted in the Interflow amount for the source ACD queue in the Queue report. If the Night Forwarded number is an ACD queue, then numbers of Calls Accepted, Answered, or Abandoned (among other things) are reflected in the count for the destination ACD queue. The call is not counted as an Accepted call (or Answered, etc) against the source ACD queue.

If a call is not Night Forwarded (whether or not Night RAN is given), the call counts as an Accepted Call (or Answered, etc) against the source ACD queue. It will not count under Interflow in this case.

If the Time Overflow feature is used, the Calls Answered value includes answered Time Overflow calls from another queue. Calls to this ACD queue that are answered by another queue (via Time Overflow) are not counted.

ACD

See **Automatic Call Distribution**

ACD Report Buffer

A component of ACD Performance Reporting that transfers your call center data from the Call Accounting Buffer to the ACD Parser program for processing into your historical database. The ACD Report Buffer is a software application that runs on a computer connected to the Call Accounting Buffer.

ACD state

When an agent is engaged on an ACD call, they are considered to be in the ACD state. Also see Agent states.

ACD time (Talk time, DCP time, ACD time, Customer talk time)

The duration of an ACD call (including ACD hold time), or the length of a customer's call. Basically, from the time the agent answers the ACD call to the time when either the customer or the agent disconnects the call. ACD time is also

called Direct Call Processing time, Customer time, ACD Talk time, Call Processing time, or Talk time.

Active

In most telephone systems, 'active' is defined as having the ability to receive ACD calls. Agents become active when they log into the telephone system.

Agent

A general term for someone who handles telephone calls in a call center. Other common names for the same job include operator, Telephone Service Representative (TSR), attendant, and representative.

Agent states

The type of telephone activity an agent either performed or is engaged in performing. The time an agent spends in each state is tracked and is included in the information sent by the telephone system.

All Trunks Busy (ATB)

The situation that occurs when a call is received by a trunk group and, because of the level of telephone traffic, the trunk group cannot route the call. If a trunk busy condition exists beyond a single reporting period (for example, it begins during period 1 and is still busy during period 2), that condition may be pegged for both periods.

All Trunks Busy Calls

A peg count of the number of times a call received by a trunk group could not be routed by that trunk group, due to the level of telephone traffic.

All Trunks Busy Time

The total amounts of time calls that were received by a trunk group could not be routed by that trunk group, due to the level of telephone traffic.

All Trunks Busy Longest

The longest amount of time a call was received by a trunk group and could not be routed by that trunk group, due to the level of telephone traffic.

Answered Call (CDNs)

This is the number of calls that entered the CDN and were answered with the controlled operation or according to the scripting of the CDN's routing.

Answered Call (Queues)

A call that was routed to an ACD queue, and was then answered by an agent in that ACD queue. The number of Answered Calls is based on the following:

If a call is Night Forwarded, it is counted as an Interflowed call for the Source ACD queue in the Queue report.

If the Night Forwarded number is an ACD queue, the Answered Call is reflected in the count for the destination ACD queue. The call is not counted as Answered against the source ACD queue.

If a call is not Night Forwarded (whether or not Night RAN is given), then it counts as an Answered Call against the source ACD queue. It will not count under Interflow in this case.

If the Time Overflow feature is used, the Calls Answered value includes calls that Time Overflowed from another queue to this one (TOF-IN), as well as the number of calls that Time Overflow to another ACD queue (TOF-OUT) from this one.

This shows the number of ACD calls answered by agents for this queue, including calls that overflow into the queue.

Answered Trunk Calls Before Threshold

A peg count of Calls Answered that shows how many calls were answered before the threshold time is reached. The threshold time is set in the telephone system for the ACD queue where a trunk route terminates. Do not try to relate these numbers to the numbers of Calls Answered in the Queue reports. The number of Call Answered in the Queue reports can include Answered Calls other than the Answered Trunk Calls (such as Overflowed Answered, etc.).

Answered Trunk Calls After Threshold

A peg count of Calls Answered that shows how many calls were answered before the threshold time is reached. The threshold time is set in the telephone system for the ACD queue where a trunk route terminates. Do not try to relate these numbers to the numbers of Calls Answered in the Queue reports. The number of Call Answered in the Queue reports can include Answered Calls other than the Answered Trunk Calls (such as Overflowed Answered, etc.).

ASA

See **Average Speed of Answer**

ATB

See **All Trunks Busy**

Automatic Call Distribution (ACD)

A software feature of the telephone system that routes a call to groups of agents (also called a 'queue') based on first-in, first-answered criteria. The guiding principle is that the caller who has been waiting the longest will be first the caller routed to the next available agent. The agent that receives the call will be either the first available agent or the agent that has been available for the longest period of time.

Available state

An agent's telephone is considered in the Available state when the telephone is able to receive ACD calls. A logged on agent enters the Available mode when they log into the telephone system and then exit the Not Ready state. Some telephone systems automatically place agents into the Available state at log in. A line that is available to receive ACD calls is also available to receive Non-ACD incoming calls (internal or external).

Available time

The amounts of time that an agent in the ACD queue spends in the Available state. The Available telephone state is one where an agent is available to take an incoming ACD call.

Average Busy Time

This is the sum of all Position Manned times, minus the sum of all waiting times, *divided by* the number of positions that had any Position Manned time accumulated against them.

Average Direct Call-Processing (DCP) Time

The average amounts of time per Answered ACD call that an agent (or agents) was engaged with an ACD call. This is the total time (in seconds) that each agent spent handling ACD calls *divided by* the total number of calls answered (by either the agent or the ACD queue). Handling time is the time from initial answer of the call to final release of the call. When the telephone system data includes Hold time, the average Direct Call Processing time does not include the Hold time. In this situation, the Average DCP time is the time that the agents are active on the call, excluding holding time of ACD calls.

Average Hold Time (HDCP time)

The average amounts of time per Answered ACD call that an agent (or agents) placed an ACD call on hold. Handling time is measured from the time the agent puts the ACD call on Hold to the time the agent becomes active on the call again or the caller abandons the call. The average Hold time is the sum of all ACD call hold times *divided by* the number of ACD calls answered by the agent or ACD queue. When the telephone system data includes Hold time, the average Direct Call Processing time does not include the Hold time. In this situation, the Average DCP time is the time that the agents are active on the call, excluding holding time of ACD calls.

Average Incoming Call Time

The average amounts of time per Non-ACD call that an agent (or agents) was engaged in a call on his/her Non-ACD extensions. This is the total duration (in seconds) of all incoming calls on the agent's Non-ACD key(s) during the report period, timed from call answer to final call release, *divided by* the total number of Non-ACD calls received during that time period.

Average Incoming Call Time (Trunks)

The average amount of incoming trunk traffic time per Trunk call. This is the total incoming trunk traffic for the trunk route (in CCS) between seizure and disconnect (including non-ACD calls, if any) *divided by* the total number of calls that came in on this trunk route (including non-ACD calls) during the report period. The total number of calls per ACD queue equals the total number of Incoming Calls for all trunk routes terminating on the ACD queue.

Average Manned Time

The average amounts of time per reporting period agents were logged into the telephone system. This is the sum of all Position Manned times *divided by* the number of agent positions that had *any* manned time accumulated. An agent position is considered Manned when an agent logs into the telephone system, and the agent will continue to accumulate Manned time until the agent engages the Make Set Busy key (which logs them out of the telephone system).

Average Non-ACD In Time

The average amounts of time an agent spends engaged on incoming Non-ACD calls. The Average Non-ACD Incoming time is the sum of all times from the initial selection of the individual extension key, including transfer and conference keys, to the final release of the call, *divided by* the number of incoming calls. The telephone system only accumulates call time for one Non-ACD call per agent position at a time. It is not possible to add multiple simultaneous events (engaging

on several Non-ACD calls at once, using the Hold feature) as the total Non-ACD time would exceed real clock time. This means that if an agent position has more than one DN (or extension) key and the agent uses both at once, the reported Non-ACD call time will not be accurate. Agent positions should be configured with only one extension key unless you are willing to forego the accuracy of Non-ACD call statistics.

Average Non-ACD Out Time

The average amounts of time an agent spends engaged on outgoing Non-ACD calls. The Average Non-ACD Outgoing time is the sum of all times from the initial selection of the individual extension key, including transfer and conference keys, to the final release of the call, *divided by* the number of outgoing calls. The system only accumulates call time for one Non-ACD call per agent position at a time. It is not possible to add multiple simultaneous events (engaging on several Non-ACD calls at once, using the Hold feature) as the total Non-ACD time would exceed real clock time. This means that if an agent position has more than one DN (or extension) key and the agent uses both at once, the reported Non-ACD call time will not be accurate. Agent positions should be configured with only one extension key unless the customer is willing to forego the accuracy of Non-ACD call statistics. If an agent is involved in a conference call or an outgoing Non-ACD call, or is transferring a call when the telephone data is generated, the Non-ACD Outgoing time includes the call start time minus the current time. The Non-ACD Out and Transferred IDN amounts are not incremented until the call is released, and they are reflected in the next reporting period.

Average PCP Time (Not Ready)

The average amount of time per ACD call that an agent (or agents) was in the Post Call Processing (or Not Ready) state. The Average PCP time is measured from the time the agent goes into Not Ready (the NRD key activated) until the occurrence of any event that removes the agent from the Not Ready state. The average PCP time is the total time accumulated against all Not Ready states *divided by* the total number of ACD calls answered by an agent or ACD queue.

Average Speed of Answer

The Average Speed of Answer for calls received by an ACD queue. The timing for answering the call begins when the call is queued for the ACD queue and ends when an agent (either in the primary or overflow ACD queue) answers the call. If an agent in an overflow group answers the call, Average Speed of Answer is counted in the overflow group. This includes Enhanced Overflow Calls from other queues, but not including Timed Overflow In Calls from another queue nor Network ACD calls that are answered by a remote target agent.

Average Wait Time before Abandon

The average amounts of time per Abandoned call the customer waited to be answered before abandoning the call. This is the total of all waiting times for Abandoned calls *divided by* the number of calls abandoned in the ACD queue this reporting period.

Average Waiting Time

This is the average amount of time that an agent was available to receive an ACD call. It is the total amount of waiting time *divided by* the number of incoming ACD calls answered.

Busy (CDN)

The number of calls given a busy tone when routed to this CDN, due to a setting in the telephone system (Supervisor Control of Queue Size). Calls treated with the busy tone are noted with a B next to the entry in the telephone system data.

Busy (Queue)

An agent is considered Busy when he/she is logged into the telephone system and is engaged on an ACD call, engaged on a Non-ACD call, or in the Not Ready state. An agent is not considered Busy when he/she is in the Waiting state (waiting for an ACD call to be routed to the agent's telephone).

Busy Time

The cumulative amounts of time that an agent in the ACD queue spends in the ACD state, the Not Ready state, or the Non-ACD state. Basically, the total amount of agent position manned time minus the total amount of agent position waiting time.

Call Accounting Buffer

A hardware data collection device that receives data broadcast by the telephone system and stores that data until the ACD Report Buffer program asks for it. The device is slightly larger than the standard external modem, and connects to the telephone system via standard data cabling.

CCR

See **Customer Control Routing**

CCS

See **Centi-Call Seconds**

CDNs

See **Control Directory Numbers**

Centi-Call Seconds

A unit used for the measurement of telephone traffic analysis, equivalent to one hundred seconds of telephone usage.

Connection

A two-way communication path between terminations that allows the transmission of speech (or other information) and supervisory signals.

Control Directory Numbers

A Control DN (CDN) is a special Directory Number not associated with any physical telephone or equipment. The CDN specifies a destination ACD queue to which incoming calls are directed. Multiple CDNs can place calls into the same ACD queue. The parameters of the CDN, not those of the ACD queue, determine call treatment.

Customer Control Routing (CCR)

Customer Controlled Routing enables the customer to customize the treatment and the routing of incoming calls

DCP

See **ACD Time**

Default DN (CDN)

The number of ACD calls routed to the Default DN for this CDN. This is usually an ACD queue.

Directory Number

A numbered code (usually a four or five digit number) used to route calls to a collection of telephones, otherwise know as an ACD queue.

Directory Number Key (DN Key, Extension, Non-ACD line)

A Directory Number Key is a button on a person's telephone that allows them to take calls routed directly to their telephone or to make calls to other telephone extensions. When a person calls your telephone directly, they are dialing the number for one of the DN keys on your telephone. When an agent presses a DN

key to make or receive a call, any other call in progress is automatically released (unless on hold). When the call on the DN key is released, the agent position is automatically returned to whatever state it was in before the DN key was pressed. Any call being presented to the ACD In-Calls key, but not yet answered by the agent when the DN key is pressed, is moved back to the head of its priority grouping in the incoming call queue for the ACD queue.

Disconnect

The total number of controlled calls that were given forced disconnect by the system. If you want to set a time limit to long conversations, you can implement a Timed Forced Disconnect timer on each route. Any conversation that reaches that timer threshold will be disconnected instantly.

Division

A user-defined collection of ACD queues. Divisions are usually organized along the lines of functionality or type of telephone activity (i.e. the Sales division and the Support Division).

DN

See **Directory Number**

EAR

See **Enhanced ACD Routing**

Enhanced ACD Routing

An optional ACD feature that allows supervisors to regulate ACD traffic and to give different RAN and music treatments to calls queued at the same ACD queue.

HDCP

See **Hold Direct Call Processing Time**

Hold Direct Call Processing Time (HDCP)

The time (in seconds) that each agent spent with an ACD call placed on Hold. Hold time is measured from the time the agent puts the ACD call on Hold to the time the agent becomes active on the call again or the caller abandons the call. When Hold time appears, the DCP time does not include the HDCP time; the DCP time is the time that the agents are active on the call, excluding holding time of ACD calls. HDCP only appears in the data from the telephone system if the data output is set for Totals (rather than the usual Averages).

High Priority Trunks (HPR)

The number of trunks designated as High Priority. Calls being routed to an ACD queue via a High Priority Trunk are presented before another queue's Timed Overflow queue (TOFQ) calls.

HPR Trunks

See **High Priority Trunks**

IDs

See **Log In IDs** or **Position IDs**

Incoming Calls (Agent or Queue)

A phone call received by an agent in the ACD queue on his/her telephone extensions.

Incoming Calls (Trunk)

This is the total number of calls that came in on this trunk route (including non-ACD calls) during the report period. The total number of calls per ACD queue equals the total number of Incoming Calls for all trunk routes terminating on the ACD queue. The number of Incoming Calls equals the numbers of (Calls Abandoned Before Threshold) plus (Calls Abandoned After Threshold) plus (Calls Answered Before Threshold) plus (Calls Answered After Threshold). Do not try to relate this number to those of the ACD reports (Answered Calls, Accepted Calls, and Abandoned Calls). This number applies to auto-terminating trunks and reflects how the trunk was first handled (answered or abandoned).

Incoming Non-ACD Calls

This is the number of incoming calls that arrived on an agent's DN key(s) (or telephone extensions) during the report period.

Interactive Voice Response (IVR)

An option of the telephone system that gives you the ability to route calls according to the caller's response to your recording. Most IVRs take the form of a recording that states (for example) 'If you want Sales, press one. If you want Support, press two'.

Interflows

The number of calls removed from this queue and directed to another (internal or external) queue by the interflow mechanism. This number does not include Time

Overflow calls. The Interflow (ENI) key allows the supervisor, during excess traffic periods, to redirect incoming ACD calls to another pre-designated ACD queue. If a call is Night Forwarded, it is counted as an Interflow for the source ACD queue in the Queue report.

IVR

See **Interactive Voice Response**

LAN

See **Local Area Network**

Local Area Network (LAN)

A group of computers connected via a networking protocol (such as Ethernet, Novell, etc.), that can communicate and share resources with each other.

Log In IDs

When an agent wants to receive ACD calls at their telephone, they first must log into the telephone system. Depending on how the telephone system is programmed, there are two different methods an agent can use to log in. The first method uses a **Log In ID**. When the agent wants to take ACD calls, they enter a (usually four-digit) number. The telephone system then tracks their telephone activity according to that log in number. The other method uses a **Position ID**. When the agent wants to take ACD calls, they hit their ACD button twice. The telephone system then tracks their telephone activity according to the position ID of the telephone that they used to log in. The major difference between the two different methods is that Log In IDs track the telephone activity of a number (which may appear at different telephone locations) and Position IDs track the telephone activity of a particular telephone (regardless of whose using it). If your agents always sit at the same telephones, then the Position ID method will track the telephone activity of the agents (because the activity of the telephone is always the same as the activity of the agent). If your agents sometime sit at different telephones, then, in order to track the telephone activity of the agents correctly, the telephone system needs to be configured to use Log In IDs.

Longest Wait before Answer

The longest time a call had to wait before being answered by an agent in the ACD queue. This excludes Time Overflow calls answered by a target agent, but includes Recall to Source calls answered by a source agent.

Make Set Busy

Engaging the Make Set Busy key on the agent's telephone logs the agent out of the telephone system. Telephone sets that are logged out of the telephone system cannot receive ACD calls.

Manned

An agent is considered Manned if they are logged into the telephone system and able to take ACD or Non-ACD calls. When Manned, agents can be in the Available, Not Ready, ACD, or Non-ACD states.

Manned time

The period of time an agent was logged into the ACD queue. Manned time includes time spent in the Available, ACD, Not Ready, or Non-ACD states. Manned time is accumulated when an agent logs into the telephone system and stops when the agent engages the Make Set Busy key (which logs the agent out of the telephone system).

MSB

See **Make Set Busy**

Non-ACD Calls

A peg count of the number of times that agents initiated or received a call on their individual extension telephone keys. Transfer and conference keys are also included in this category. The peg count is increase each time the agent engages an extension (or DN) key, regardless of whether or not they dial a number or whether a telephone connection takes place.

Non-ACD state

A Non-ACD call is a call that is either placed or received on one of an agent's extensions. Non-ACD calls include Incoming, Outgoing and Internal calls that were placed from, or received at, an agent's extension.

Not Ready (PCP)

A state an agent can engage to finish paperwork associated with a recently finished ACD call. Not Ready is also called the Post Call Processing state. Agents enter the Not Ready state by engaging the Not Ready Key on their telephone sets. Agents should only engage the Not Ready key when performing work directly related to completing ACD calls. The Not Ready state should not be

used for other activities not related to ACD calls (i.e., bathroom breaks, lunch, etc.).

Outgoing Non-ACD Calls

The number of outgoing calls from an agent position using extension (DN), conference, or transfer keys.

Outgoing Calls (Trunk)

The total number of calls outgoing on this route. These are non-ACD calls, but could include outgoing calls made from the DN keys of the ACD agent positions.

Overflow

The number of calls redirected to another queue with the Automatic Overflow feature, excluding Timed Overflowed calls.

PBX

See **Private Branch Exchange**

PCP

See **Not Ready**

Peg Count

A simple count of the number of times an event has occurred, like moving a peg on a cribbage board or making notches on a piece of wood.

Position IDs

When an agent wants to receive ACD calls at their telephone, they first must log into the telephone system. Depending on how the telephone system is programmed, there are two different methods an agent can use to log in. The first method uses a **Log In ID**. When the agent wants to take ACD calls, they enter a (usually four-digit) number. The telephone system then tracks their telephone activity according to that log in number. The other method uses a **Position ID**. When the agent wants to take ACD calls, they hit their ACD button twice. The telephone system then tracks their telephone activity according to the position ID of the telephone that they used to log in. The major difference between the two different methods is that log in IDs track the telephone activity of a number (which may appear at different telephone locations) and position IDs track the telephone activity of a particular telephone (regardless of whose using it). If your agents always sit at the same telephones, then the position ID method will track the telephone activity of the agents (because the activity of the telephone is

always the same as the activity of the agent). If your agents sometime sit at different telephones, then, in order to track the telephone activity of the agents correctly, the telephone system needs to be configured to use log in IDs.

Post Call Processing

See **Not Ready**

Private Branch Exchange (PBX)

A switching system providing telephone communications between internal stations and external telephone networks. The term generally refers to manually operated switching equipment as opposed to computer operated switching.

Queue

A queue is a number of calls that are waiting to be answered by agents in an ACD queue. The calls are usually assigned to available agents in a first-arrived, first-answered basis. The queue is the “line up” where incoming calls wait until they are answered. The queue sometimes refers to the group of agents available to answer incoming calls to an ACD queue.

RAN

See **Recorded Announcement**

Raw Data

The unprocessed data output from the telephone system. This data is passed to the Call Accounting Buffer box on an hourly, half-hourly or hourly on the half-hour basis. The periodic raw data reports are a summation of the telephone activity of your call center, and are processed into your historical database by the ACD Parser application.

Recalled to Source

If a call Time Overflows while in the target ACD queue (because it previously Overflowed or Interflowed by number from a source queue), it will then be recalled back to the source ACD queue. The call is then linked to the source ACD queue’s Timed Overflow queue, and the Recall To Source number is increased.

Recorded Announcement (RAN)

An option of the telephone system, which plays a recorded announcement for callers waiting for an available agent. An example would be when a caller is waiting and hears 'Your call is important to us. Please remain on the line, and your call will be answered by the next available agent'. A call can only get one

First RAN treatment and one peg against the 1ST RAN amount. Each time that a call receives second RAN treatment, it is pegged against 2ND RAN amount. The 1ST RAN and 2ND RAN peg counts do not necessarily equal the Accepted Calls peg counts for an ACD queue. It is possible for a caller to hear RAN both before and after a transfer. In this case, the Accepted Calls count would tally only one call while there are two RAN peg count increases.

Routing

The way a call is passed through the telephone system. The telephone system handles the way a call is sent, and the route the call takes through the telephone system. Different versions of the telephone system can route a call in different ways, according to the available routing features.

Routed by IVR

The Route By IVR field is incremented if the call is queued to receive IVR treatment and the IVR routing initiates a call modification to another field. This is the number of IVR controlled calls given a Route To command (and no additional processing).

Routed by CCR

The number of calls routed by CCR and given a Route To command by the CCR script (and no additional processing).

Supervisor

A user-defined group of agents, usually collected under a designated supervisor.

Team

A user-defined group of agents, usually collected under a group specific label (such as French, Spanish, East, West, etc.).

Telephone Service Factor (TSF)

The TSF measures how quickly incoming calls are answered. The customer specifies the time (in seconds) in the programming of the telephone system. The percentage of incoming calls answered or abandoned before that time (in seconds) is the TSF. A value of 100 means all calls were answered or abandoned within the customer-defined time threshold. Calls Time Overflowed and calls answered by target agents (TOF In Calls) are included in these calculations because TOF In Calls accumulate a Before Time Threshold value. However, TOF In Calls do not last in the target queue long enough to accumulate an After Time Threshold value. Calls Time Overflowed from a source ACD queue (TOF-Out) are not counted in

this field because the TSF factor does not apply to calls answered by the source agent.

Timed Overflowed In

ACD calls that hit the call's primary ACD target and then are either assigned to an ACD agent as an Overflow ACD target or are assigned to an ACD agent in an ACD queue where the group is defined as an Overflow ACD target. The source and target queues must have the Timed Overflow option turned on for accurate reports. For example, the source ACD queue has the option turned off and the target ACD queue has the option turned on. When an overflowed call is answered by the target queue, that call is pegged as answered for the target queue but not for the source queue, resulting in an inaccurate report.

Timed Overflowed Out

ACD calls that hit the call's primary ACD target and then are either assigned to an ACD agent as an Overflow ACD target or are assigned to an ACD agent in an ACD queue where the group is defined as an Overflow ACD target. A call is also counted as Overflowed Out of the ACD queue when it is assigned (by the telephone system) to an extension or when the call is routed off-site. Calls answered by voice mail are counted as Overflowed Out. The source and target queue must have the Timed Overflow option turned on for accurate reports. For example, the source ACD queue has the option turned off and the target ACD queue has the option turned on. When an overflowed call is answered by the target queue, that call is pegged as answered for the target queue but not for the source queue, resulting in an inaccurate report.

TOF

See **Timed Overflow In** or **Timed Overflow Out**

Transferred Internal DN Calls (IDN)

The Transferred IDN number is the sum of all the calls the agent Transferred or Conferenced while on an active Non-ACD call. The number increases when the Transfer or Conference is complete.

Transferred ACD Calls

The Transferred ACD number is the sum of all the calls the agent Transferred or Conferenced while on an active ACD call. The number increases when the Transfer or Conference is complete.

Trunk

Trunks are the physical links that enable telephone communication. A trunk route carries calls from outside to answering positions in your ACD queue.

TSF

See **Telephone Service Factor**

Work Trunks

This is the number of trunks (including non-ACD trunks) that are currently enabled.

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