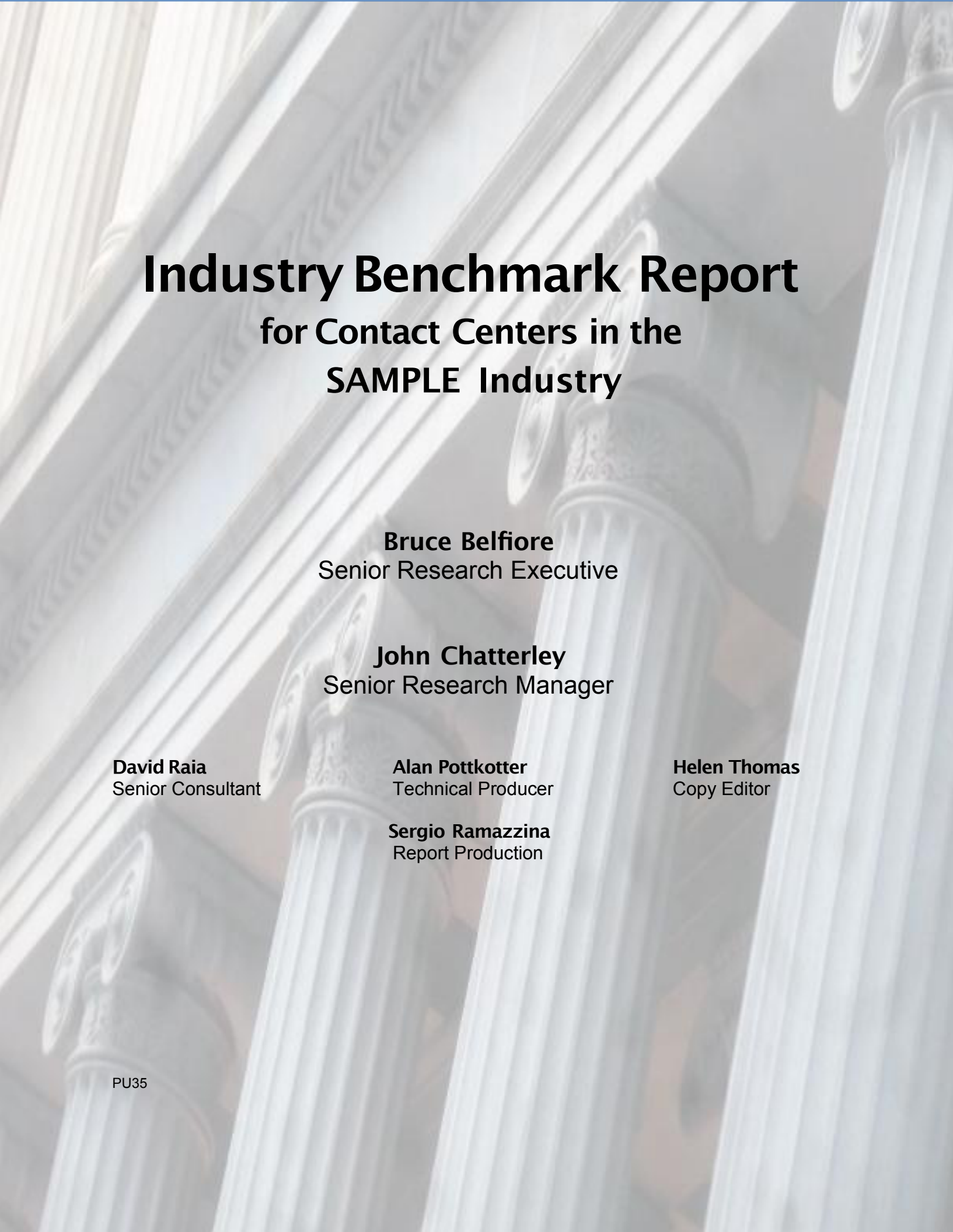


# **Benchmark Portal**

## **Contact Center Industry Benchmarking Report**

### **Sample Industry**

From the world's largest and most respected database of contact center metrics



# **Industry Benchmark Report**

## **for Contact Centers in the SAMPLE Industry**

**Bruce Belfiore**  
Senior Research Executive

**John Chatterley**  
Senior Research Manager

**David Raia**  
Senior Consultant

**Alan Pottkotter**  
Technical Producer

**Helen Thomas**  
Copy Editor

**Sergio Ramazzina**  
Report Production

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Please send detailed questions to:  
[Information@BenchmarkPortal.com](mailto:Information@BenchmarkPortal.com)

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PU35  
Revision: 4/15/2019

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## Acknowledgements

We wish to extend our thanks to the many contact center managers who have kept our database current and growing over the years. We would also like to acknowledge the contribution of colleagues who have provided both inspiration and perspiration to make this effort useful to managers all over the world. In particular, we note the founding contributions of our former partners, Dr. Jon Anton and David Machin, and the constant support of Professor Richard Feinberg of Purdue University.

We also thank our report team, especially Alan Pottkotter, Sergio Ramazzina, and Helen Thomas for their untiring efforts to make these reports the best value available for the contact center industry.

Bruce L. Belfiore, Senior Research Executive  
John Chatterley, Senior Research Manager  
David Raia, Senior Consultant



# **Chapter 1: Introduction**

## Chapter 1: Introduction

**“Every enterprise, in every sector, can benefit from comparing itself to other similar operations. This promotes a process of creative soul-searching regarding comparative strengths and weaknesses, which, in turn, leads to identification and adoption of best practice improvements. We have repeatedly seen the transformative power of systematic benchmarking for customer contact centers.”**

~ Bruce Belfiore, BenchmarkPortal

Benchmarking has proven to be an important management tool, especially since the late 1970's. Comparing operating metrics and methodologies with other enterprises in the same industry has provided managers with useful insights that, in turn, result in a virtuous process of discovery, action and improvement that leads, in turn, to superior performance.

Superior performance in customer contact is more important today than ever. As products become commoditized, it is the service aspect which determines loyalty and repeat sales in more and more industries. Knowing your competitive position on the customer service you provide is key.

Contact centers are ideal operations for benchmarking for several reasons:

- ✓ They all have systems (such as Automatic Call Distributors, or ACDs) that automatically capture large quantities of data on key performance metrics. Unlike industries where gathering apples-to-apples data is a long and laborious process, gathering data for contact centers is easier - - and can now be largely automated under a patented process pioneered by BenchmarkPortal.
- ✓ Senior managers look to contact centers to prove their value to the organization on a regular basis. Benchmarking the contact center provides management the performance-based information needed to make decisions on staffing, technology acquisition, and other budget-related matters
- ✓ Contact centers are one of the enterprise's keys to the customer experience, satisfaction and, ultimately, loyalty. The center's relative performance on quality metrics can reveal volumes about its competitive position against its industry.

### Why BenchmarkPortal?



Since beginning its benchmarking activities on the campus of Purdue University in 1995, BenchmarkPortal has gained a reputation as the source for the highest quality data for the contact center industry. Data we receive goes through a multi-layered scrubbing process to ensure accuracy. This includes both automated statistical parameters, as well as human quality control. In addition, BenchmarkPortal was awarded a patent for its advanced benchmarking process. As a result, BenchmarkPortal is considered the gold standard for data in the contact center sector.

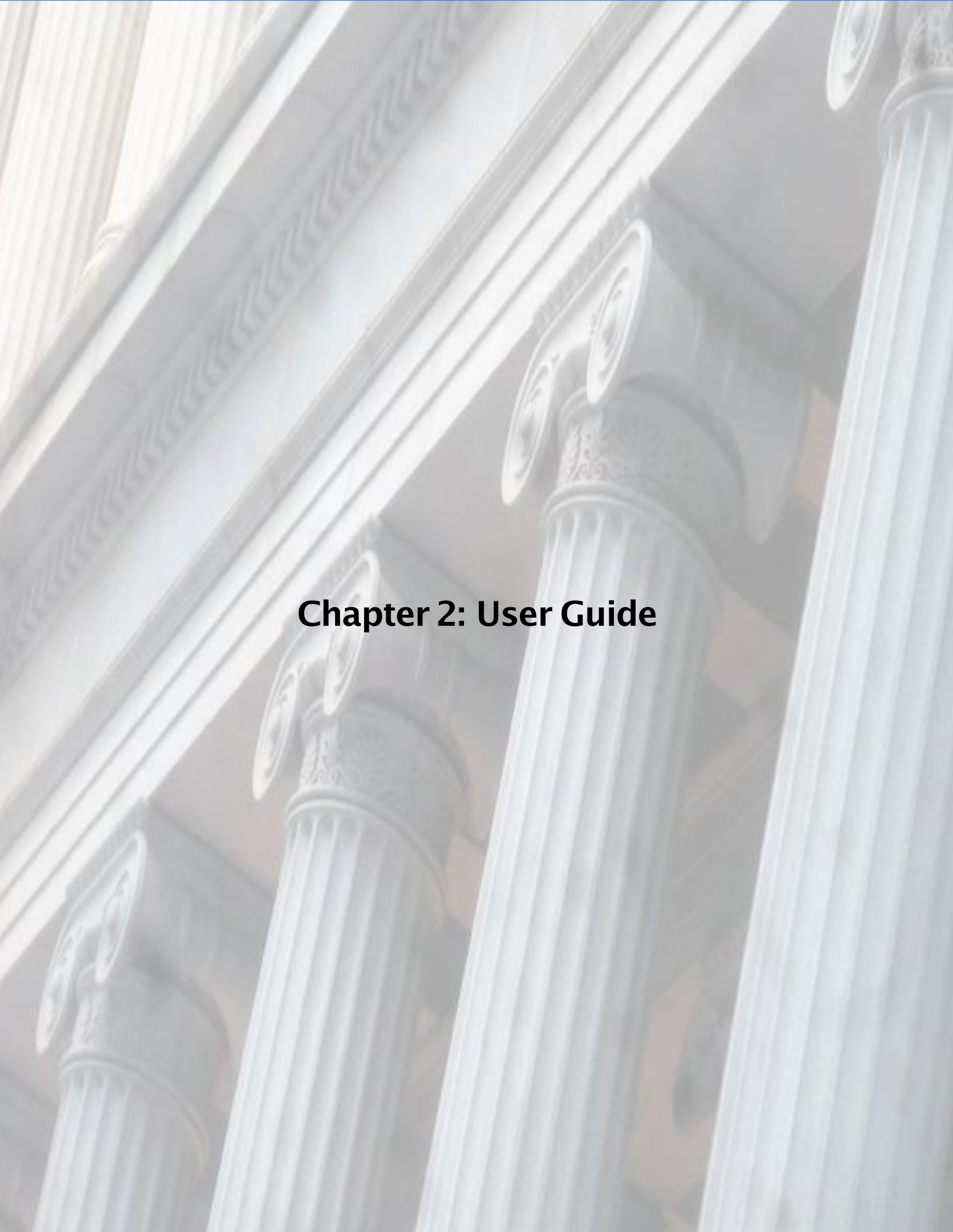
By monitoring competitive position with the help of BenchmarkPortal benchmarking, and identifying areas that require improvement, contact centers make continuous improvement a part of their culture. The ROI that results provides quantifiable proof of efficiency and effectiveness.

BenchmarkPortal has developed a balanced scorecard process which is explained in Appendix B (The Tonchev Performance Index) and which lies at the heart of the benchmark reports that are provided to individual centers that input their data into the BenchmarkPortal database.

A Balanced Scorecard Identifies Gaps Compared with Your Peer Industry					
Effectiveness Metrics	Your Value	Industry Average	Efficiency Metrics	Your Value	Industry Average
Top Box Caller Satisfaction in Percent			Inbound Calls per Agent per Hour		
BottomBox Caller Satisfaction in Percent			Cost per Call in Dollars		
Top Box Agent Satisfaction in Percent			Average Talk Time in Minutes		
BottomBox Agent Satisfaction in Percent			Average After-Call Work Time in Minutes		
Calls Closed on First Call in Percent			Average Occupancy in Percent		
Average Speed of Answer in Seconds			Average Utilization in Percent		
Calls Transferred in Percent			Adherence to Schedule in Percent		
Average Hold Time in Seconds			Average Agent Attendance in Percent		
Average Time in Queue in Seconds			Auxiliary Time in Percent		
Average Calls Abandoned in Percent			Turnover of Full-Time Agents in Percent		

Note that our industry reports have evolved over time, and continue to do so. We have recently launched our Multi-Channel Benchmark Survey, which includes more data from the email, chat, white mail and social media channels. It will take time to develop enough data to provide these metrics on an industry-specific basis. In the meantime, we include here metrics that are gathered from all industries.

We hope that you find this report useful and a stimulant for improvement. If comparing your metrics to your industry causes you to take just one important action to improve your operations, we will feel we have done our job. Please feel free to contact us with any questions or requests for further assistance. Contact centers are our passion, and we are happy to share our insights with you.



## **Chapter 2: User Guide**

## Chapter 2: User Guide

Most users of our Industry Reports fall into one of two categories:

### 1. Contact Center Managers

This Industry Report is a great first step into benchmarking for many contact center managers. They want to become familiar with the Key Performance Indicator metrics of the contact center sector, without making the commitment to assemble all of their own metrics. For these purchasers we offer a complimentary one-hour session with one of our experts, to walk through the report and discuss the metrics and what they can mean to managers.

Ultimately, we hope that you consider becoming one of our database contributors. In fact, if you decide to join our large community of data contributors within 90 days of buying this Industry Report, we will offer you one free Individual Benchmarking Report, which shows your metrics side-by-side with your industry peers.

To view a sample Individual Benchmarking Report, please click on this link (please allow adequate time for download):

[SAMPLE CCB](#)

### 2. Consultants and Analysts

Most consultants and analysts buy our Industry Reports to allow them to benchmark their clients as part of a larger engagement. We understand that you are primarily interested in the numbers, so we have made them easy to find and to use.

You may use them in your analyses and presentations to clients, with proper attribution to BenchmarkPortal as your data source.

However, we would also like you to know that we may be available, under appropriate circumstances, to work with you on your consultant teams. We have a very collegial group of contact center experts who can add depth to your teams and add value to your client engagements.

If you would like to discuss the possibility of having BenchmarkPortal work with you as a consulting partner on your engagements, please contact us at [info@benchmarkportal.com](mailto:info@benchmarkportal.com)

Note that BenchmarkPortal's complete Glossary of Terms is found in Appendix A of this Report.



## **Chapter 3: Methodology**

## Chapter 3: Methodology

The BenchmarkPortal database, founded at Purdue University in 1995, is the world's first, largest and most respected database of contact center metrics. Data is gathered on a continuous basis using one of three means:

- Participants can go to the BenchmarkPortal website and input their metrics into the survey found there;
- Participants can download the benchmarking survey from the BenchmarkPortal website. They can print and complete the survey by hand and then fax it to us for insertion into our database; or
- Participants can subscribe to iBenchmark, our automated process that receives the majority of metrics directly from the participants' systems and enters them into our database. Data that does not come directly from systems (such as budget and agent turnover) is input manually once or twice a year via a survey portal.

Data that are submitted by survey participants are subject to three levels of rigorous quality checking, to ensure that our database remains accurate. The first level involves static parameters, which are set by our statistical experts. The second level of quality assurance involves a series of cross-check formulae, which utilize data provided to validate key pieces of data. For example, if the sum of the average talk time plus the average after call work time multiplied by the average number of calls per agent per hour yields a number over 60 minutes, the anomaly will result in a red flag for our database department. We will then reach out and work with the participant to identify the proper metric from their management reports. The third level of scrutiny is provided directly by our Research team members, who review each survey report individually.

This commitment to quality distinguishes BenchmarkPortal's database from other industry sources which simply take in metrics as entered by participants. While this level of scrutiny requires considerable effort and cost, we are committed to providing the best data possible to our industry.

We note that, as more centers adopt the patented iBenchmark automated benchmarking, the less impact there will be from human error. Automating the entry of data and provision of reports, utilizing our patent-protected system, ensures that the correct data are being entered "at the source" for the majority of metrics.

All individual metrics are held as completely confidential and are never revealed with the name of the participant to third parties. Only aggregated data are published in our Industry Reports, such as the one you are reading now.

The data sets are all tagged by industry sector, as well as by other characteristics, such as country of origin. This allows us to create reports that are drawn entirely from one industry sector. In addition, we can create World-Wide Industry Reports by gathering data sets by geographical region. Custom reports can be generated by using parameters agreed with the client. The data sets are selected and downloaded from the database. The report generator accesses the data and calculates the industry average. It also segregates the top quartile (25%) of the data sets and shows the average for these top-performing centers under the “Upper-Quartile” column.

To determine which centers to include in the Best of Industry calculation, we do the following:

- We separate the performance metrics into two categories: efficiency metrics that correspond to costs (these are metrics such as cost per call, talk time, after-call work time, etc.) and effectiveness metrics, which correspond to quality (caller satisfaction, first contact resolution, etc.). In this way we place balanced emphasis on the elements that reflect quality of customer service and elements that indicate careful use of company resources.
- The two groupings of metrics are put through separate expert formulas to calculate two coefficients: the cost index (indicating efficiency) and the quality index (indicating relative effectiveness).
- The two indices are added together for each center, and the centers are stack ranked by their combined scores.
- The top quartile of the centers is selected out.
- The averages for each metric are calculated from this upper quartile of centers and presented as “Best of Industry Averages”.

Note that use of this methodology means that not every “Best of Industry” average will be better than the overall industry average. Centers that perform better overall may be less strong (compared with the industry) for specific metrics.

Thank you for acquiring this report. Please let us know if you have any questions or comments, or wish to discuss purchase of a customized report.

If you would like to consider benchmarking your own metrics through an individualized report, please feel free to contact us for a chat.



**Chapter 4: Highlights and Interpretation  
of the SAMPLE Industry Key Performance  
Indicators (KPIs)**

## **Chapter 4: Highlights and Interpretation of the SAMPLE Industry Key Performance Indicators (KPIs)**

This chapter provides focus on individual metrics of interest to contact center managers and analysts.

The metrics are grouped according to the following categories:

Section One: Contact Center Classification

Section Two: Contact Center Costs

Section Three: Contact Center Performance

Section Four: Customer Satisfaction

Section Five: Human Resource Management

Section Six: Multi-Channel Metrics



## Section One: Contact Center Classification

In this section we graphically depict the survey results regarding selected contact center classification questions.

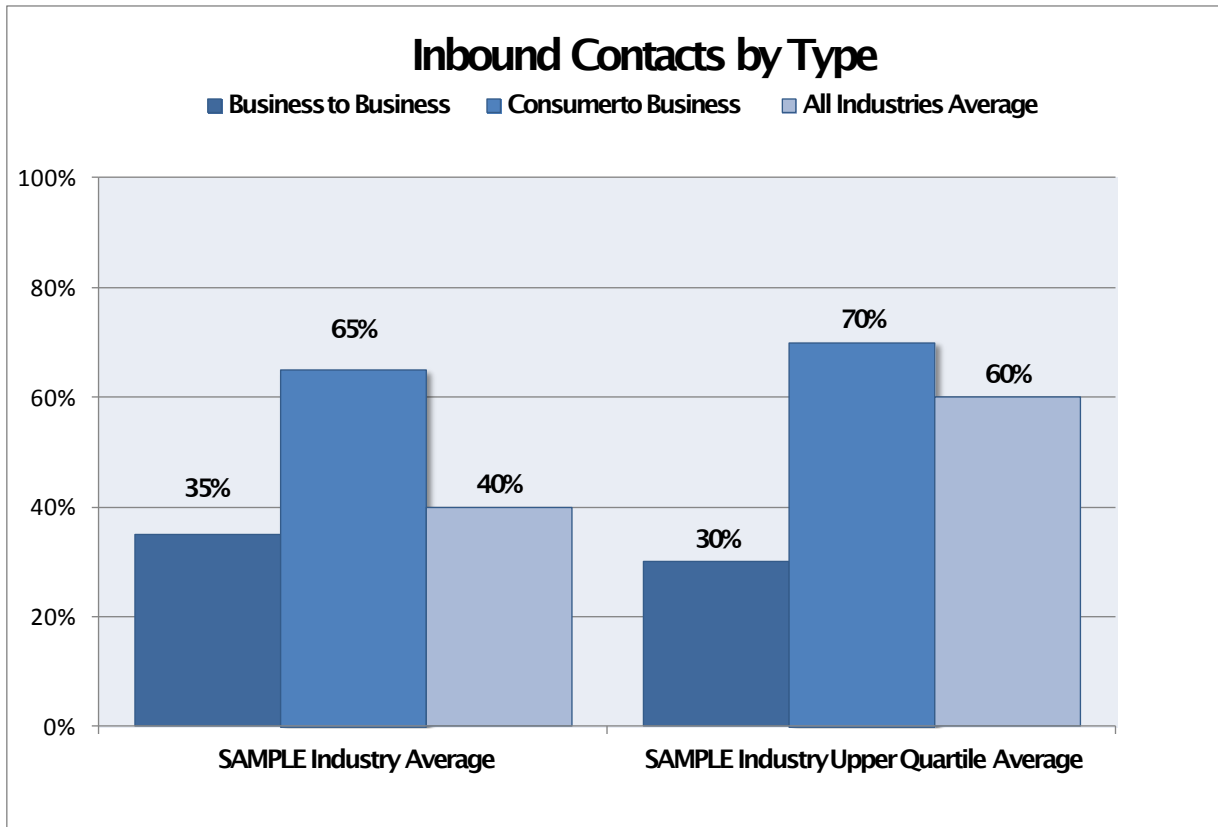


Figure 1. Inbound Contact Types

**Question:**

How do your inbound contacts break down in the following two categories?

- Business to Business (B2B): This is the percentage of calls exchanged with other businesses as opposed to end-user (individual customer) callers.
- Business to Consumer (B2C): This is the percentage of calls exchanged with end-user (individual customer) callers.

**Interpretation:**

As can be expected, the preponderance of calls to this industry segment are consumer related and are typically calls regarding customer service requests/inquiries, and other issues. B2B calls are typically associated with commercial inquiries, account verification, or other related issues.

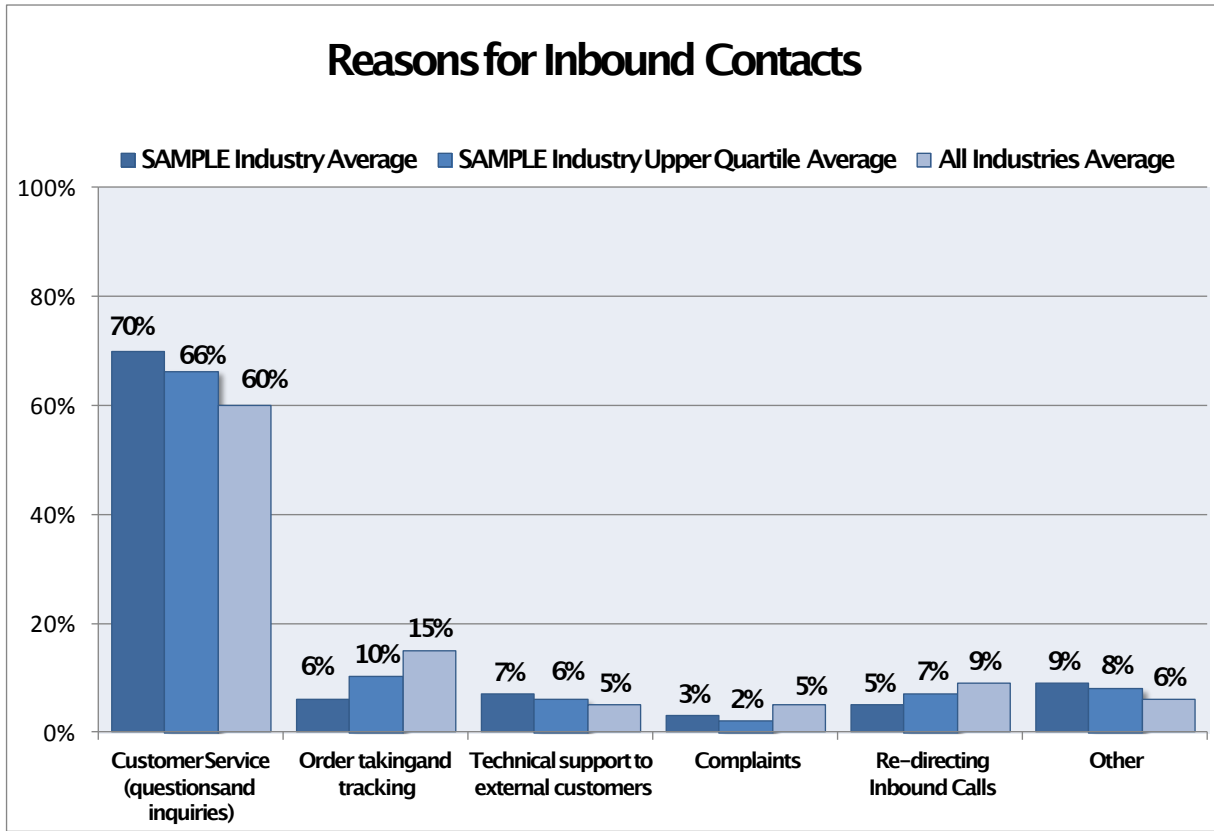


Figure 2. Reasons for Inbound Contacts

**Question:** Which functions do your agents provide regarding inbound contacts?

**Interpretation:** Customer service questions and inquiries constitute the vast majority of all inbound contact volume across the entire SAMPLE Industry sector. Order Taking and Re-directing inbound calls constitutes the next greatest reasons for calls across the SAMPLE Industry centers. The “All Industries” averages vary from SAMPLE Industry Averages, as can be expected.

## Section Two: Contact Center Costs

This section graphically depicts survey results regarding contact center cost performance.

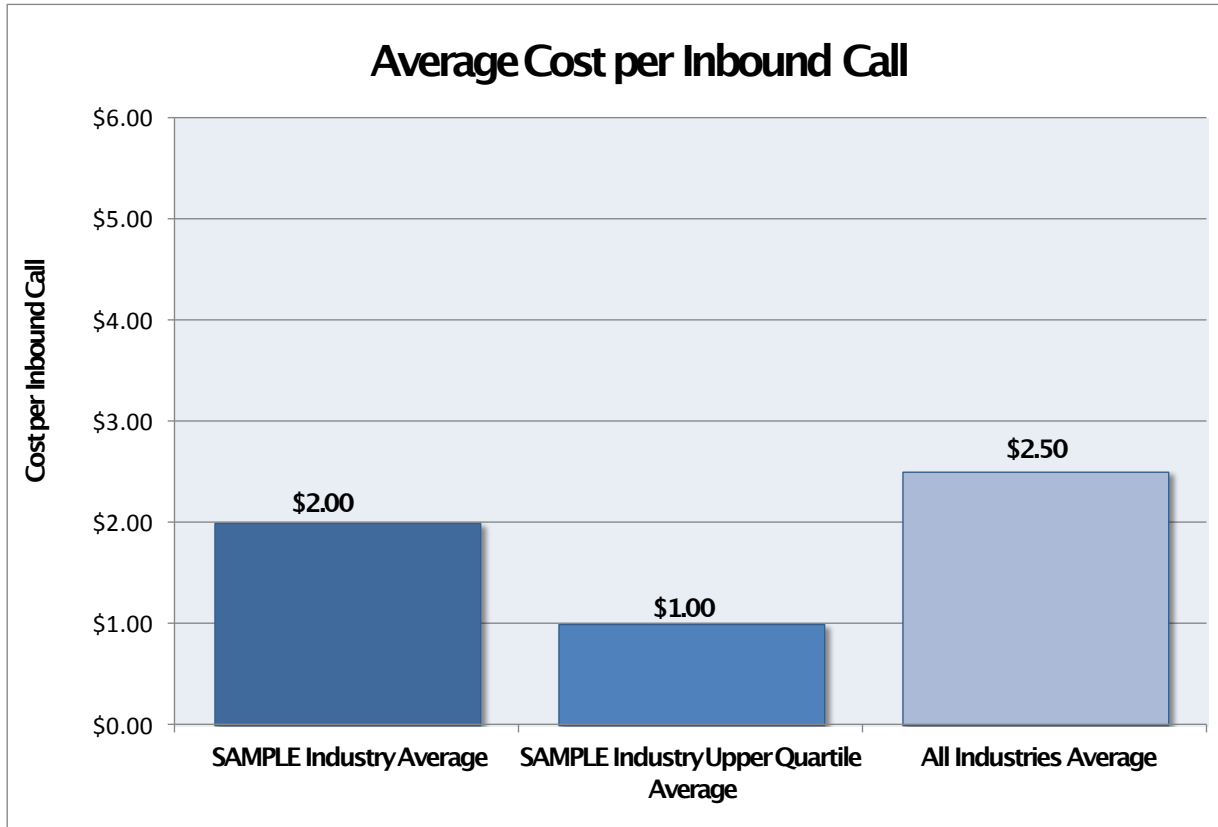


Figure 3. Average Cost per Inbound Call

**Question:** What is your average cost per inbound call?

**Interpretation:** SAMPLE Industry managers report that IVR self-service containment has had a significant positive impact on cost per call (see page 25). With call center averages of over 1.5 million inbound calls handled annually, just a XX% reduction in the cost per call would represent a savings of over \$\*\*\*K annually. As shown above, in Upper Quartile and All Industries comparisons, the opportunity for significantly more than a XX% improvement certainly seems achievable. Our research shows cost per call as the one of the most closely watched performance measures that contact center managers use to determine their contact center efficiency, with IVR self-service accounting for the largest contribution.

**There are 13 additional highlight charts & interpretations included in this chapter.**



**Chapter 5: Detailed Benchmark Results  
for the  
SAMPLE Industry**

Classification Questions	SAMPLE Industry Average	SAMPLE Industry Upper Quartile Average	All Industries Average
Calls Offered	*****	*****	*****
Calls Handled Annually	*****	*****	*****
Annual Call Volume Handled by Agents	*****	*****	*****
Annual Call Volume Handled by IVR	*****	*****	*****
Business to Business	*****	*****	*****
Business to Consumer	*****	*****	*****
Full Time Agents	*****	*****	*****
Part Time Agents	*****	*****	*****
Full Time Equivalents (FTE's)	*****	*****	*****
Labor Union (Yes)	*****	*****	*****
Labor Union (No)	*****	*****	*****
Call Type (Question & Inquiries)	*****	*****	*****
Call Type (Order Taking / Tracking)	*****	*****	*****
Call Type (Technical Support)	*****	*****	*****
Call Type (Complaints)	*****	*****	*****
Call Type (Re-directing Inbound Calls)	*****	*****	*****
Call Type (Other)	*****	*****	*****

Financial	SAMPLE Industry Average	SAMPLE Industry Upper Quartile Average	All Industries Average
Annual Budget	*****	*****	*****
Agents Base Salary	*****	*****	*****
Average Hourly Wage Front Line Agents	*****	*****	*****
Average Starting Hourly Wage Front Line Agents	*****	*****	*****
Average Cost Per Call	*****	*****	*****

Agent Time Per Channel	SAMPLE Industry Average	SAMPLE Industry Upper Quartile Average	All Industries Average
Inbound Phone	*****	*****	*****
Outbound Phone	*****	*****	*****
E-mail	*****	*****	*****
Web Chat	*****	*****	*****
Other	*****	*****	*****

Voice Channel Performance Metrics	SAMPLE Industry Average	SAMPLE Industry Upper Quartile Average	All Industries Average
Average Speed of Answer in Seconds	*****	*****	*****
Average Talk Time in Minutes	*****	*****	*****
Average After Call Work Time in Minutes	*****	*****	*****
Average Queue Time in Seconds	*****	*****	*****
Average Caller Hold Time in Seconds	*****	*****	*****
Average Abandoned Rate in Percent	*****	*****	*****
Calls Resolved on First Call In Percent (FCR)	*****	*****	*****
Agent Occupancy in Percent	*****	*****	*****
Adherence to Schedule in Percent	*****	*****	*****
Average Attendance in Percent	*****	*****	*****
Average Calls Transferred in Percent	*****	*****	*****
Average Auxiliary (AUX) Time in Percent	*****	*****	*****
Average Utilization in Percent	*****	*****	*****
Calls Per Agent Per Hour	*****	*****	*****

<b>Human Resources Metrics</b>	<b>SAMPLE Industry Average</b>	<b>SAMPLE Industry Upper Quartile Average</b>	<b>All Industries Average</b>
Span of Control (Agent:Supervisor Ratio)	*****	*****	*****
Annual Turnover	*****	*****	*****
Promotional Turnover	*****	*****	*****
All Other Turnover	*****	*****	*****
Number of Shifts (Full Time)	*****	*****	*****
Number of Shifts (Part Time)	*****	*****	*****
Shift Length in Minutes (Full Time)	*****	*****	*****
Shift Length in Minutes (Part Time)	*****	*****	*****
Formal Method Collect Agent Satisfaction (Yes)	*****	*****	*****
Formal Method Collect Agent Satisfaction (No)	*****	*****	*****
Top Box Agent Satisfaction	*****	*****	*****
Bottom Box Agent Satisfaction	*****	*****	*****

<b>Caller Satisfaction Metrics</b>	<b>SAMPLE Industry Average</b>	<b>SAMPLE Industry Upper Quartile Average</b>	<b>All Industries Average</b>
Formal Method Collect Caller Satisfaction (Yes)	*****	*****	*****
Formal Method Collect Caller Satisfaction (No)	*****	*****	*****
Top Box Caller Satisfaction	*****	*****	*****
Bottom Box Caller Satisfaction	*****	*****	*****



## Alternate Channel Metrics – All Industries

Outbound Call Metrics		All Industry Average	All Industries – Upper Quartile Average
•	Average Annual Volume (Outbound)	* * * * *	* * * * *
•	Average Talk Time in (Minutes)	* * * * *	* * * * *
•	Average After Call Work Time (Minutes)	* * * * *	* * * * *
•	Average Cost Per Call (US Dollars)	* * * * *	* * * * *

E-mail Metrics		All Industry Average	All Industries – Upper Quartile Average
•	Average Annual Volume (E-Mail)	* * * * *	* * * * *
•	Average Speed of Answer (Hours)	* * * * *	* * * * *
•	Average Handle Time (Minutes)	* * * * *	* * * * *
•	Average First Contact Resolution - FCR (Percent)	* * * * *	* * * * *
•	Average Cost Per E-mail (US Dollars)	* * * * *	* * * * *

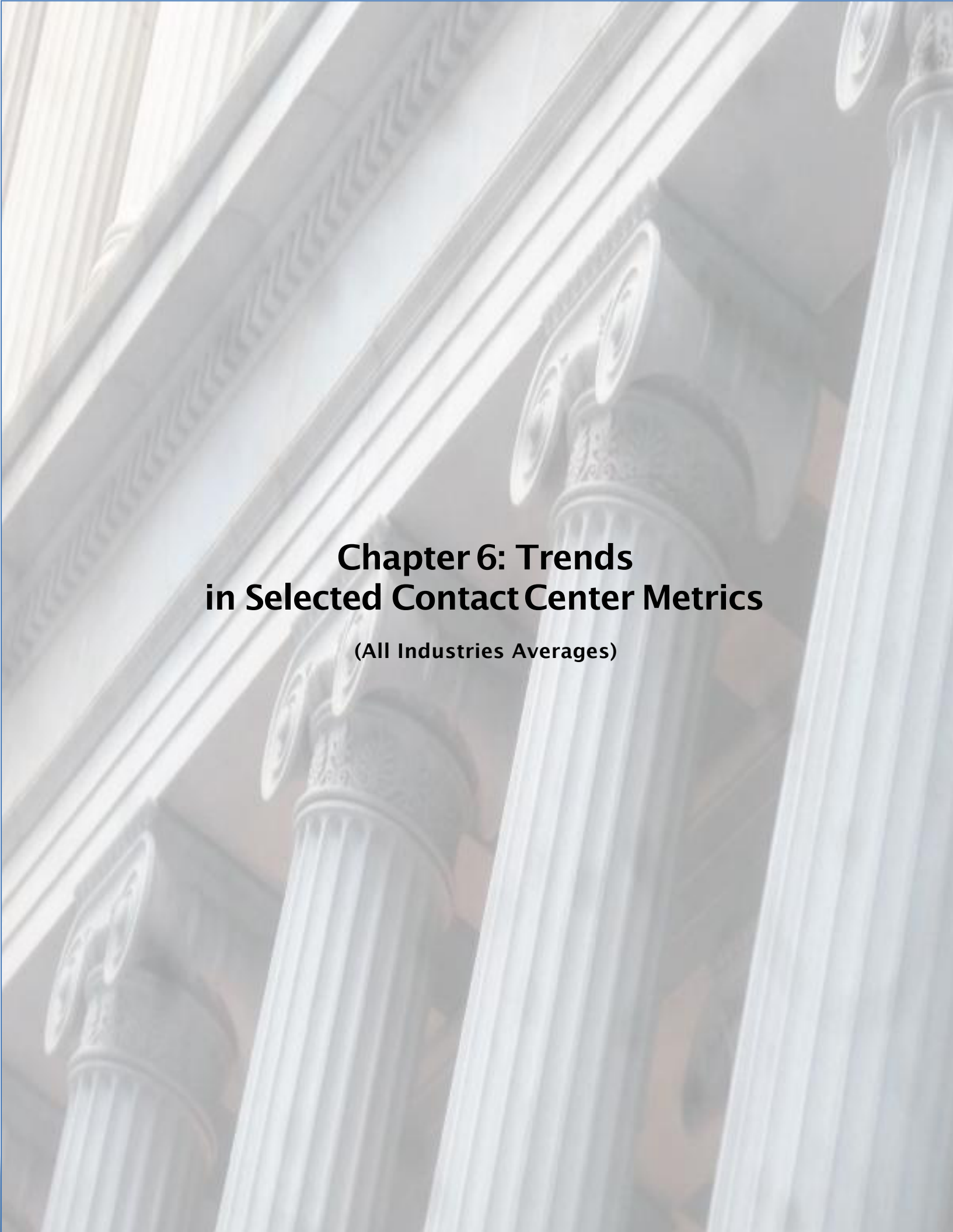
Social Media Metrics		All Industry Average	All Industries – Upper Quartile Average
•	Average Annual Volume (Social Media)	* * * * *	* * * * *
•	Average Speed of Answer (Hours)	* * * * *	* * * * *
•	Average Handle Time (Minutes)	* * * * *	* * * * *
•	Average Cost Per Social Media (US Dollars)	* * * * *	* * * * *

Web Chat Metrics	All Industry Average	All Industries – Upper Quartile Average
• Average Annual Volume (Web Chat)	* * * * *	* * * * *
• Average Speed of Answer (Seconds)	* * * * *	* * * * *
• Average Handle Time (Minutes)	* * * * *	* * * * *
• Average First Contact Resolution - FCR (Percent)	* * * * *	* * * * *
• Average Cost Per Web Chat (US Dollars)	* * * * *	* * * * *

Fax	All Industry Average	All Industries – Upper Quartile Average
• Average Annual Volume (Fax)	* * * * *	* * * * *
• Average Handle Time (Minutes)	* * * * *	* * * * *
• Average Cost Per Fax (US Dollars)	* * * * *	* * * * *

Postal Mail	All Industry Average	All Industries – Upper Quartile Average
• Average Annual Volume (Postal Mail)	* * * * *	* * * * *
• Average Handle Time (Minutes)	* * * * *	* * * * *
• Average Cost Per Postal Mail (US Dollars)	* * * * *	* * * * *

Other	All Industry Average	All Industries – Upper Quartile Average
• Average Annual Volume (Other)	* * * * *	* * * * *
• Average Handle Time (Minutes)	* * * * *	* * * * *
• Average Cost Per Other Transaction (US Dollars)	* * * * *	* * * * *



## **Chapter 6: Trends in Selected Contact Center Metrics**

**(All Industries Averages)**

## Introduction

As heir to the industry's first call center benchmark studies, launched at Purdue University over two decades ago, BenchmarkPortal has a wealth of data of interest to contact center managers and consultants. The statistical trends in this section reflect yearly changes in contact center KPIs across All Industries, with focus on the past decade.

The first groups of graphics look at quality-related items, while the second group considers cost-related metrics over time.

**There are**

- 5 Effectiveness(Quality) Performance trend charts & analysis,**
  - 6 Efficiency (Cost/Productivity) Performance trend charts & analysis, and**
  - 3 Alternate Channel trend charts & analysis**
- presented in this chapter.**



## **Chapter 7: Frequently Asked Questions**

**This FAQ contains common questions asked by contact center professionals who have purchased our Industry Reports**

Question	Answer
How are your Industry Reports produced?	Benchmark members are constantly providing us data via surveys. When a contact center professional participates in our flagship survey, the In-Depth RealityCheck (CCBR), their data is scrubbed, validated, cataloged in their industry, and then housed in our databases. We then take the data and run the averages that appear in the Industry Reports.
What Industries are reported on within an Industry Report?	Each standard Industry Report covers a single industry. Please refer to our website at <a href="http://www.BenchmarkPortal.com/store">www.BenchmarkPortal.com/store</a> and click on Industry Reports at the top for a complete list of the industries offered.
What kind of Key Performance Indicators (KPIs) are measured within your Industry Reports?	We report metrics for the following contact center areas: general classification (i.e. size, business orientation), contact center costs (operational), contact center performance measures, customer satisfaction, human resources, and alternate contact channel KPIs. You may download a sample Industry Report at the following Web address: <a href="http://www.benchmarkportal.com/store_files/IndustryReportSAMPLE.zip">http://www.benchmarkportal.com/store_files/IndustryReportSAMPLE.zip</a>
What geographical regions do the Industry Reports cover?	Our standard Industry Reports cover North America only (USA & Canada). Custom reports for other geographical regions can be produced on a custom basis. These include our Worldwide Reports (which break out the Americas, EMEA and Asia-Pacific)
How current is the data contained in your Industry Reports?	The reports are updated every 6 to 12 months.
How do I know when the report I have has been published?	The month of publication of the report is on the inside title page of the report.
Can I get a list of the contact centers that participated in your Industry Report(s)?	Our confidentiality policy prevents us from disclosing the identity/contact information for any individual participant. A copy of the confidentiality agreement can be found at the following Web address: <a href="http://www.benchmarkportal.com/cs.pdf">www.benchmarkportal.com/cs.pdf</a>
I would like to order an Industry Report, what is the earliest I can get it after placing an order?	Reports that are current (updated within the past 12 months) are provided within 2 business days of receipt of order. Reports that require updating will be shipped in 7-10 business days.

Question	Answer
Where can I purchase additional Industry Reports?	Additional reports can be purchased via our Web site at <a href="http://www.BenchmarkPortal.com">www.BenchmarkPortal.com</a> (then click on Industry Benchmark Reports under the heading Performance Benchmark Reports).
What format does the report come in?	Industry Reports are delivered electronically in Adobe PDF format using a download link and password sent to the purchaser by email.
What if I am looking for a custom cut within an Industry (i.e. contact centers in the Consumer Products Industry that handle a majority customer service questions)? Can an Industry Report be produced that can suit my needs?	We can do custom cuts within major industry sectors (e.g. Financial Services, Insurance, Telecom, etc.). Custom Industry Reports take time to produce, so it will typically take 10 – 14 days. Prices of custom reports are quoted on an individual basis.
I have a list of companies I would like Industry data on. Can you produce a custom Industry Report?	For a fee of \$100, we will scan the database to determine the percentage of companies you listed that are included in our database that we could roll-up into a custom Industry Report. However, as per our confidentiality statement we cannot and will not disclose the name of any single company or group of companies included in a specific report. If an order is subsequently placed, the \$100 search fee will be deducted from the purchase price.
In Chapters 3 & 4 of the report, how do you define “Upper-Quartile”?	See Chapter 3 – Methodology.



**Appendix A: Glossary of Terms for  
Contact Centers**



## A

**AbandonRate:** This is the percentage of calls that get connected to the ACD, but get disconnected by the caller before reaching an Agent, or before completing a process within the IVR. The abandon rate is the percentage of calls that are abandoned compared to calls received.

**ACD:** See Automatic Call Distributor.

**AdherencetoSchedule:** A measure of whether Agents are “on the job” as scheduled. This percentage represents how closely an Agent adheres to his/her detailed work schedule as provided by the workforce management system. 100% adherence means that the Agent was exactly where they were supposed to be at the time projected in their schedule. The scheduled time allows for meetings with the supervisor, education, plus answering customer phone calls.

**AfterCallWork Time:** Call-related work that is done when an Agent is not on a call. This is the cumulative amount of time Agents spend on performing follow-up work after the Agent has disconnected from the caller, divided by the total number of calls handled by Agents. The data for after call work time is taken from the system.

**Agent:** A general term for someone who handles telephone calls in a call center. Other common names for the same job include, but are not limited to: operator, associate, sales associate, collections specialist, customer service representative (CSR), or customer care representative.

**AgentDevelopment:** A process designed to address the Agent’s individual needs, and to help them build their work skills and achieve their career objectives. This may include, but not be limited to, work behaviors expected, taught, measured and tracked; continuous education offered and encouraged; and career planning.

**AgentOccupancy:** The percentage of total paid hours of an Agent’s shift during which the Agent is logged in to the ACD or other technology and is available to handle inbound phone, outbound phone, e-mail, chat and other productive work (white mail or back office work), divided by the total scheduled hours at work.

**Agent / SupervisorRatio:** This is the average number of agents that a supervisor manages. It is calculated by dividing the total number of agents by the total number of supervisors that manage those agents.

**AgentTurnover:** The number of Agents who left their “Agent job” (voluntarily or involuntarily) during the previous 12-month period, divided by the total number of Agents working, expressed as a percentage. Track those who were hired during the period, minus those who left their job during the same period. The average number of Agents working is calculated by taking the beginning-of-the-year Agent head count plus the end-of-year Agent head-count and dividing that number by two. **Do not include attrition during training.**

$$\text{Annual Turnover} = \frac{P}{A + R + P} \times 100$$

**Where:**

A = the total number of Agents working during the specified period;

R = the number of new-hires during the specified period; and  
 P = the number of Agents that left the center during the specified period.

**Agent Utilization Rate (a.k.a. Utilization):** (NOTE: this definition was expanded in November, 2012, to account for the shift towards multi-channel operations. Dedicated inbound call centers are not affected by this change; only multi-channel centers are affected.) Utilization is the percentage of the Agents' shift engaged in productive work. For centers which are completely or almost-completely engaged in taking inbound calls, this will mean the percentage of logged-in time during which the Agent is in active telephone mode (involving talk time, hold time and after-call work time). For multi-channel centers, utilization will also capture productive time engaged in e-mail, chat, outbound and other productive work (responding to postal mail or performing productive administrative/"back-office" work). Managers of multi-channel centers must work to gather accurate information on productive time from appropriate systems (e-mail, chat, outbound systems, etc.), and be ready to make those reports available for review.

**NOTE! FOR SINGLE-FUNCTION, DEDICATED AGENT CENTERS, PLEASE USE THE FOLLOWING FORMULA:** (e.g., Agents that handle only inbound calls or only e-mail or outbound calls)

**AVERAGE SINGLE FUNCTION UTILIZATION PER DAY =**

$$\frac{(\text{Avg. Contact Time in Min.} + \text{After Contact Time in Min}) \times (\text{Avg Contacts per Shift})}{\text{Logged-in Time-in-Minutes per Shift}}$$

**NOTE! FOR BLENDED MULTI-CHANNEL CENTERS, PLEASE USE THIS FORMULA:**

**Inbound calls:** (Avg. Contact Time + Avg. After Contact Work Time) X (Avg Contacts per Shift) PLUS

**Outbound calls:** (Avg. Contact Time + Avg. After Contact Time) X (Avg Contacts per Shift) PLUS

**E-mails:** (Avg. Contact Time + Avg. After Contact Time) X (Avg Contacts per Shift) PLUS

**Web Chats:** (Avg. Contact Time + Avg. After Contact Time) X (Avg Contacts per Shift) PLUS

**Social Media:** (Avg. Contact Time + Avg. After Contact Time) X (Avg Contacts per Shift) PLUS

**Postal Mail/Back Ofc work:** (Postal Mail/Back Ofc Work Time) X (Avg Transactions per Shift) =

**Total Utilized Minutes per Shift**

**AVERAGE MULTI-CHANNEL/FUNCTION UTILIZATION PER DAY =**

$$\frac{\text{Total Utilized Minutes per Shift}}{\text{Logged-in Time-in-Minutes per shift}}$$

**Alternate Points of Contact:** Refers to contact channels other than phone that a customer can use to communicate with a contact center, such as email, web chat, fax, social media, and postal mail. (See also Contact Channel.)

**Analytics and Reporting Process:** A process designed to provide a means to collect, store, and analyze call center performance data, and caller inquiry data. The products of this process are

actionable reports for Agents, Supervisors, Managers, and other departments. As financial margins in small centers are often narrow, these centers are more prone to “bleed red” when not managed efficiently.

**Annual Inbound Call Volume Handled by Agents:** This is the sum of all inbound calls routed to the agent queue(s)/splits from the ACD.

**Annual Inbound Call Volume Handled by the IVR:** This is the number of inbound calls handled to completion by the IVR; this is often referred to as IVR “self-service.”

**Agent Satisfaction Survey (ASAT) Score:** BenchmarkPortal collects top and bottom box “overall” agent satisfaction metrics through its In-Depth RealityCheck™ benchmarking surveys. These metrics, which reflect a 5 out of 5 (i.e., “very satisfied”) rating from agents for **top box**, and a 1 out of 5 (i.e., “very dissatisfied”) rating from agents for **bottom box**, are revealing about a center when compared with other centers in its industry.

However, when BenchmarkPortal conducts a Contact Center Assessment, or a Center of Excellence Certification exercise, it goes well beyond the top box and the bottom box “overall” satisfaction metrics alone. In these cases, an in-depth survey of agents and team leads is conducted for each center. The survey includes 76 questions that are grouped into 18 categories, which include supervisor style, internal communications, customer focus and many others. Agents score each question on a scale of 1 to 5. The answers are aggregated for the center being assessed, and percentages are computed for each category.

**Automatic Call Distributor (ACD):** A device used to manage and distribute incoming calls to a specific group of terminals (Agents).

**Automatic Dialer (aka, Autodialer):** A device used to generate outbound calls based on a call list, and distribute answered outbound calls to a specific group of terminals (Agents) for completion.

**Automatic Number Identification (ANI):** ANI is a service of telecommunications carriers, which identifies the telephone number of the calling party. It is commonly used for billing, call routing and database synchronization. There are several specific technologies that fit under the umbrella of ANI, including caller ID.

**Auto Response:** See E-Mail Auto Responder.

**Auxiliary (AUX) Time in Percent:** This is the average amount of time per shift, in percent, that an Agent is logged into an AUX state. Auxiliary time may include, but is not limited to, times for training, meetings, assigned off-line work, e-mails, or other job-related tasks. After Call Work Time and Outbound dialing activity is work related, therefore it is not considered Auxiliary Time and therefore it is inappropriate for AUX-codes to be used as such.

**Average Attendance in Percent:** Actual number of shifts worked divided by the planned number of shifts multiplied by 100. This is a percentage representing how often Agents are NOT absent from work due to an unplanned absence (not to include excused absences, i.e., vacation, authorized leave, jury duty, etc.). This is calculated by dividing the total number of unexcused absences by the total number of planned shifts, then subtracting the resulting number from 100.

**Average Cost per Call/Contact:** See Cost per Call/Contact.

**AverageDialsper Hour per Agent:**This is the sum of all outbound calls manually or automatically dialed and connected to an Agent divided by the total of the Agent hours devoted to outbound calls.

**AverageHandleTime:** See Handle Time.

**AverageHoldTimeInboundCalls:**The time during which an Agent placed a call on hold during the body of a call. This is the cumulative total of all hold time, divided by the number of calls placed on hold, for the period that is measured (please use annual metrics).

**AverageHourlyAgentWage(US\$):** The averaged amount of monetary compensation paid to agents working in a contact center, to be reported in US dollars/cents.

**AverageInboundAfterCallWork Time:** See Average Talk Time

**AverageInbound Calls Abandoned:**See Abandon Rate.

**AverageInboundCall Talk Time:** See After Call Work Time

**AverageNumberofShiftsper Year:** The averaged number of shifts worked annually by an agent within the contact center being reported.

**AverageOccupancyin Percent:** See Occupancy.

**AveragePaidShiftLengthin Hours:**The average length of an Agent shift, including lunch and breaks, e.g., 8 hours, 10 hours, etc.

**AverageResponseTime:**This is an average of the amount of time, rounded to hours, that elapse while a contact center to respond to a non-voice inbound customer contact (E-mail, Web Chat, FAX, White Mail, etc.).

**AverageSaleValueper Call:**This number is determined by taking the total sales in dollars and dividing it by the total number of calls handled that result in a sale during the same period of time.

**AverageSpeedofAnswer(ASA):**This is the cumulative total length of time of calls that are in queue or that are ringing before being answered by an Agent, divided by the total numbers of calls answered. This includes both IVR-handled calls and calls handled by an Agent.

**AverageStartingHourlyAgentWage(US\$):** The averaged amount of monetary compensation paid to new agents hired to work in a contact center, to be reported in US dollars/cents.

**AverageTalkTime:**This is the sum total of Agents' time-in-talk mode, divided by the total number of calls handled by Agents.

**AverageTimebetweenCalls(a.k.a. Idle Time):** This is the average number of minutes during which the Agent is logged into the system in a ready state, waiting for the next call. In other words, it is the average idle time in minutes an Agent spends in waiting mode between calls.

**AverageTimein Queue:**This is the cumulative total length of time of calls spend in queue before being answered by an Agent. It is the time-in-wait time incurred by a call directed to a split/skill, which includes the time of wait during transfers. This is the average wait time that a caller endures waiting for an Agent to answer the telephone after being placed in the queue by

the ACD. This differs from average speed of answer, because this calculation includes only calls that actually had a wait time. This metric is also known as Average Time of Delay. Most ACD systems provide this number.

**Average Timeto Abandonment:** This is the average amount of time a customer will wait in queue before abandoning.

**Average Total Live Connects per Agent per Hour:** This is the sum of Live Outbound Call Connects divided by total Agent hours. This includes all live conversations to numbers dialed.

**Average Total Right Party Connects (RPC) per Agent per Hour:** This is the sum of all Right Party (Decision-Maker) Outbound Call Connects divided by total of all Agent hours. (Typically, the correct party connection is able to lead to a resolution.)

## **B**

**Base Salary per Year:** This is the gross annual base earnings (or guaranteed earnings before incentive pay) of an Agent. (Based on 2080 annual paid hours for a full time employee).

**Benchmarking:** A structured, analytical methodology that is designed to establish a reference point for performance measures. The outcomes of this process enable managers to identify, assess, and deploy those proven practices that are highly likely to enable them to gain and maintain a competitive advantage.

**Best Practice:** Best practice is variously used to describe the best performing metric in a category, or a proven process or technology that results in optimal performance as measured through benchmarking.

**Blended Agents:** The term “Blended Agents” refers to Agents that are scheduled to split their workload between handling inbound calls and making outbound calls. Blended Agents can also refer to Agents who spend a portion of their work schedule engaged in non-telephone activities such as handling e-mails, chat sessions, back-office work, and so forth.

**Bonus or Incentive Compensation:** Annual compensation that is over and above the base wage. This is measured, per Agent, by dollar or percentage above the hourly wage.

**Bottom Box Agent Satisfaction:** The percentage of lowest possible scores received on the question: “Overall, how satisfied are you with your position?” (a “lowest” score of 1 out of 5, or the bottom of whatever scale you use.)

**Bottom Box Caller Satisfaction:** The percentage of lowest possible scores received on the question: “Overall, how satisfied were you with the service you received during your call to our center?” (A “lowest” score of 1 out of 5, or the bottom of whatever scale you use.)

**Budget:** The annual call center budget is the total annual dollar amount attributed to and allocated for all expenses associated with the operation of the call center for which the call center manager is accountable. The annual budget should include all fully loaded direct and indirect costs for budgetary line items such as: labor, benefits, and incentives for Agents, management, training, and support personnel; HR costs (e.g., recruiting, screening, training); telephony

expenses (toll, trunks, equipment); technology purchases/installation (hardware, and software); technology maintenance (hardware and software) network; furniture, fixtures, decorations, etc.; utilities (gas, water, power, UPS backup); maintenance (repair, janitorial, upkeep); supplies; overhead expenses and charge-backs for shared corporate costs (e.g., legal, risk management, payroll administration, IT support, security, accounting, groundskeeping, real estate, floor space, common areas, etc.) as applicable.)

**Burdened Cost per Agent:** The annualized average cost of an Agent, including salary, commissions, bonus, and benefits.

**Business to Business:** This is the percentage of calls exchanged with other businesses as opposed to end-user (individual customer) callers.

**C**

**Calculated Cost per Call in Dollars:** The Annual Budget divided by Annual Calls Handled (total of IVR-handled and Agent-handled calls). In blended outbound activity, take the percent of the Annual Budget dedicated to Outbound call-occupied time, divided by live Outbound calls handled.

**Calculated Cost per Call Minute in Dollars:** The quotient of Annual Budget divided by Annual Calls Handled (both technology-handled and Agent-handled calls), divided by Average Call Handle Time (the sum of Talk Time + Hold Time + After Call Work Time).

Annual Budget	Live calls handled	Live call time per call	Cost per minute
\$800,000	/ 200,000 = \$4 cost per call	/ 5 minutes	\$4 / 5 = \$0.80

**Calculated Calls per Contact in Dollars:** The Annual Budget divided by total Annual Contacts from all channels (Agent handled and Automated) that are handled by the contact center or location.

**Calculated Calls per Full-Time Equivalent (FTE) in Dollars:** The value derived from dividing the annual budget by the total number of FTE's. (Annual Budget / Total FTE's)

**Calculated Self-Service in Percent:** The value given from total number of annual calls handled by the IVR divided by the sum of all IVR-handled calls and Agent-handled calls, expressed as a percent.

$$((\text{Annual IVR-Handled Calls}) / (\text{Annual IV-R Handled Calls} + \text{Annual Agent-Handled Calls}) \times 100)$$

**Call Center Performance Evaluation:** This is a process designed to provide a visible means to manage the call center and report its accomplishments to upper management. Properly implemented, it defines those key performance indicators (KPIs) that are optimal to manage the call center, determines the frequency with which to collect and analyze performance KPIs, and provides an understanding and guidance of how to manage the center if KPIs fall below goals.

**Call Quality Monitoring:** A process designed to observe and evaluate from 5 to 10 calls per month for each Agent, and to record the evaluations on a monitoring form to be discussed by the Supervisor and the Agent during the coaching process.

**CallRecording:**A technology that enables call centers to capture and record most customer/Agent telephone interactions. See Call Quality Monitoring Process.

**CallRoutingProcess:**(See also ACD) This is a process designed to ensure that each call is routed to the next available Agent with the proper skills and training to handle the call in the most effective and efficient manner possible. Call routing often includes identifying “high-value callers” and routing them to a shorter queue.

**CallTypes:**For purposes of classification, call types are broken out into the following categories:

- Customer Service (questions and inquiries)** – General questions, requests, inquiries, etc. calls from external customers.
- Order Taking and Order Tracking** – Specific calls from external customers related to purchasing &/or tracking the purchase of a product(s) &/or service(s) from the company.
- Technical Support** – Calls from external customers related to issues with products/services produced/provided by the company.
- Complaints** – Calls from external customers who want to express dissatisfaction or displeasure with products/services produced/provided by the company.
- Re-directing Inbound Calls** – Calls that require the agent to transfer the call to another department or specialist for resolution.
- Other** – Contacts handled by agents that are not calls, which include Emails, Web Chats, Social Media interactions, Faxes, Postal Mail, Back Office work, etc.

**CallerSatisfaction:**This is a state of mind that a customer has regarding his or her most recent interaction with a call center. It is typically measured by asking the question: “Overall, how satisfied were you with the telephone interaction you just had?” (See also Top Box Caller Satisfaction)

**CallerSatisfactionCollectionProcess:**An established, routine process of gathering customer feedback regarding a recent call center contact experience. This process includes after-call IVR surveys, follow-up outbound (live Agent) calls, follow-up email surveys, and the like. This is reported as the Percentage of call centers with a formal mechanism to capture caller satisfaction in our surveys and reports.

**CallerSatisfactionOutboundProcess:**A standard (1 to 5) rating process of gathering customer feedback regarding a recent contact center-initiated call experience. This process includes after-call IVR surveys, follow-up outbound (live Agent) calls, follow-up e-mail surveys, and the like.

**CallerSelf-ServiceProcess:**This is a process designed to a) to have the caller input into the IVR information about themselves and the reason for their call in order to minimize live-Agent time, and b) to migrate low-value calls to the IVR, where the caller’s question can be answered by the IVR without the caller talking to an-Agent.

**CallerServiceRecovery:**This process is designed ensure that follow-up to “disgruntled” callers is properly executed, that their issues are understood and, where possible and reasonable, their

issues are acted upon and resolved with a win-win solution. This process is different from that of Service Improvement in that it, Service Recovery, is designed to win back disgruntled or lost customers.

**CallsBlockedinPercent:**The total number of calls that did not connect with the ACD divided by the total number of calls offered plus blocked calls multiplied by 100. These are calls that never make it to the ACD. Examples of blocked calls are: “busy signals,” “number not in service” messages, etc. This number is commonly furnished by the telecommunications provider.

**CallsHandled:**These are the total number of unique inbound calls received in a given year by the center that are completed by an Agent, plus those completed by the IVR. The numeric value for calls handled must be equal to or less than calls offered, and should be approximate to the numeric value of calls offered less those abandoned. (This number is often provided by your ACD.)

**CallsHandledbyAgent–Inbound:**These are the total number of unique inbound calls received in a given year by the center that are completed by an Agent. The sum of this value, when added to the sum of calls handled by the IVR, should equal the value for calls handled by the center. (This number is often provided by your ACD.)

**CallsHandledbyAgent–Outbound:**These are the total number of outbound calls connected during a given period of time by the center that are completed by an Agent.

**CallsHandledbyIVR:** These are the total number of unique inbound calls received in a given year by the center that are completed by the IVR. The sum of this value, when added to the sum of calls handled by Agents, should equal the value for calls handled by the center. (This number is often provided by your ACD.)

**CallsOffered:**This is the total number of inbound calls received at the ACD in a given year by the center. (This number is provided by your ACD.)

**CallsperAgentperHour:**The average number of calls handled per Agent per hour. Formula = 60 minutes times Occupancy times Utilization divided by the Average Handle Time (AHT = Average Talk Time + Average After-Call Work Time).

**CallsResolvedonFirstCall:**This is the total numbers of calls that were completely resolved during the course of the first inbound call initiated by the customer (and that therefore do not require a call back to resolve the issue) divided by total numbers of calls handled by Agents – expressed as a percent. Also known as first call resolution (FCR) and first time final.

**CallsTransferredinPercent:**The total number of calls transferred by Agents (due to their inability to properly or completely handle the call – for whatever reason), divided by the total number of unique calls handled by Agents. This would not include voluntary transfers to other departments after resolution occurs for the initial call reason.

**Campaign:**See Outbound Call Campaign

**CampaignList:**Outbound call dialing list(s) used in connection with Automatic (Predictive) Outbound Dialers. These lists are fed into the automatic dialer throughout the calling day until all



calls have been completed or until an answering machine response protocol has been employed. Uncompleted campaigns are carried over to the next day(s).

**ChatSession:** See Web Chat.

**Complaints:** See Call Types.

**Computer-Telephony Integration (CTI):** This refers to the technology that enables the coordination and integration of computers with telephone systems. Functions of CTI include: Calling Line Information Display, Screen Population (on call answer), On Screen Dial, Preview and Predictive Dial, and On Screen Call Control. For outbound calling such as telemarketing, CTI pre-dials the callers, matches the number of a called party with a customer record and displays it for reference by the Agent when talking to the customer.

**Connects:** See Live Connect Percent.

**ConsumertoBusiness:** This is the percentage of calls exchanged with people working for businesses as opposed to calls from individuals calling in their private capacity.

**ContactChannel:** See Customer Access Channels.

**ContactTypes:** For purposes of classification, contact types are broken out into the following categories:

- Customer Service (questions and inquiries)** – General questions, requests, inquiries, etc. calls/contacts from external customers.
- Order Taking and Order Tracking** – Specific calls from external customers related to purchasing &/or tracking the purchase of a product(s) &/or service(s) from the company.
- Technical Support** – Calls from external customers related to issues with products/services produced/provided by the company.
- Complaints** – Calls from external customers who want to express dissatisfaction or displeasure with products/services produced/provided by the company.
- Re-directing Inbound Calls** – Calls that require the agent to transfer the call to another department or specialist for resolution.
- Other** – Contacts handled by agents which are not calls, which include Emails, Web Chats, Social Media interactions, Faxes, Postal Mail, etc.

**Contacts per Hour:** The total number of customer contacts from all channels handled per Agent per shift, divided by the total occupied hours worked- i.e., 48 live calls + 15 Emails per shift / 6 hours occupied per shift = 10.5 contacts per hour

**Contacts Resolved on First Call:** This is the total numbers of customer contacts from all channels that were completely resolved during the course of the first contact initiated by the customer (and therefore do not require a follow-up contact to resolve the issue) divided by total numbers of contacts from all channels handled by Agents – expressed as a percent (Also known as First Contact Resolution (FCR) or First Time Final).

**Costper Call (a.k.a. Costper Inbound Call):** This is the sum of all costs for running the call center for the period divided by the number of calls handled in the call center for the same period. This includes all calls for all reasons whether handled by an Agent or technology, such as IVR. You can also just calculate the cost per call for Agent-handled calls. The number of calls received will be captured by the ACD. The total cost of the center can be obtained from your accounting department.

**Cost per Contact:**

a) Across all channels: This is the sum of all costs for running the call center for the specified period, divided by the number of contacts handled in the call center for the same period for all contact channels, including phone (live Agent and IVR), e-mail, web-chat.

b) By channel: This is the sum of all costs for running the call center for the specified period divided by the number of contacts handled in the call center for the same period for each contact channel, factored by its percentage of total contacts for all channels for the period, as follows:

1. **Costper AgentHandledphonecontact**= (Budget / # Agent Handled phone contacts) x (# Agent Handled phone contacts / total sum of all contacts)
2. **CostperE-mailcontact**=(Budget / # E-mail contacts) x (# E-mail contacts / total sum of all contacts)
3. **CostperWeb Chatcontact**= (Budget / # Web Chat contacts) x (# Web Chat contacts / total sum of all contacts)
4. **Costper IVR Self-Servicecontact**=(Budget / # IVR Self-Service contacts) x (# IVR Self-Service contacts / total sum of all contacts)
5. **Costper other channelcontacts**= (Budget / # of other contacts) x (# of other contacts / total sum of all contacts)

**Cross-Sell:** Across-selloccurs when an Agent recognizes that the caller might be able to use a product from the same company, but in a totally different product line. For instance, an Agent at a banking call center who is opening a savings account for a caller might recognize the advantage for the caller to purchase a CD from the bank at a higher interest rate.

**CTI:** See Computer-Telephony Integration.

**CustomerService (questions and inquiries):** See Call Types.

**CustomerAccessChannels:** Customer access channels are the multiple ways that customers can reach out and contact a company. A few of the obvious access channels are

- Telephone,
- E-Mail,
- Fax,
- Social Media
- Postal Mail,
- Web Chat

□ Other, Such As Kiosk & Face To Face.

**CustomerCentric:** Placing the wants and needs of the customer as the central focus of all business practices within the firm. Seeing your business through the “eyes of the customer.”

**CustomerLifetimeValue:** The imputed dollar revenues or profits (depending on formula) generated by the customer for as long as the customer remains with the firm.

**CustomerRelationshipManagement(CRM):** This process is designed to ensure that the Agent taking a call is aware of all aspects of the caller’s information, including such things as purchasing history, previous contacts, credit rating, channel preferences, value to the company, and many more. The CRM process allows the Agent to use this caller information to better serve the caller’s needs during the call handling experience.

**CustomerRetention:** The process of keeping a customer as opposed to losing the customer to the competition. A percentage of this figure would be the tenure of the average customer with the firm as computed by the sum of the time of all customers with the firm divided by the number of customers.

**CustomerSatisfaction:** This is a state of mind that a customer has about a company in which their expectations have been met or exceeded over the lifetime of the product. This leads to company loyalty and product repurchase.

**CustomerShare:** The percent of those who purchase the item of interest from a given firm. This is computed as the number of customers who purchase the item from a given firm divided by the number of customers who purchase the item from all firms combined.

**CustomerValueSegment:** Customer value segmentation strives to segment customers based on their financial value to the company. This value is usually based on a combination of the total amount of money that a customer spends with the company, and the profitability of that revenue stream. The best example would be the frequent flyer programs that the airlines have. United, for instance, has the following value segments with its frequent flyer program: a) regular frequent flyer, b) premium frequent flyer, and c) 1K frequent flyer.

## D

**DedicatedOutboundAgent:** This describes the differentiated skill of an Agent who is assigned and occupied full time to an Outbound team or department in the Contact Center. Such Agents typically will not switch to inbound calls or other activity during the day. This is in contrast with Blended Agent activity.

**DialAttempts:** A volume measure of all dials made to a predetermined customer list. The attempt includes the ring, no answer, voice mail, and/or connects. It becomes the baseline of Outbound activity typically used for occupancy confirmation.

**DNIS:** Dialed Number Identification Service. A carrier service for 800/888 and 900 numbers that forwards the number dialed by the caller to the called party.

**E**

**Effectiveness Index:**The index is calculated by statistically combining into an index those metrics that are indicative of effective performance. This is considered to be a quality metric and impacts customer-focused processes.

**Efficiency Index:**The index is calculated by statistically combining into an index those metrics that are indicative of efficient performance. This is considered to be a productivity metric and focuses on the cost investment of time or money in operating the business.

**E-Mail Auto Responder:**An auto-response system automatically returns a prewritten message to anyone who submits e-mail to a particular address, whether an individual or a Web site. Auto-response systems are widely used by Web sites for the purpose of responding to visitor comments and suggestions in a preliminary way. You may see an auto-responder in cases where you purchase something online, receiving a "thank you for your order" e-mail, etc.

**E-Mail Channel Annual Volume (total):**The total number of E-Mails handled by the contact center annually.

**E-Mail Channel Annual Volume Handled by Agent:**The total number of E-Mails handled by the Agents annually.

**E-Mail Channel Annual Volume Handled by Auto Responder:**The total number of E-Mails handled by an Auto Responder annually.

**External Metrics:**These are usually characterized as "soft" numbers as they are the collected attitudes, opinions, and emotions of customers or other interested parties. The data may be collected by survey, focus group, or interview methods. This represents the customer perspective.

**F**

**Fax Channel Annual Volume (total):** The total number of Faxes handled by the contact center annually.

**Fax Channel Annual Volume Handled by Agent:**The total number of Faxes handled by the Agents annually.

**Fax Channel Handle Time:**The total number of Faxes handled by an Auto Responder annually.

**First-Call Resolution:**See Calls Resolved on the First Call.

**First-Contact Resolution:**Similar to calls resolved on first call, this is the total numbers of contacts that were completely resolved during the course of the first contact initiated by the customer (and that therefore do not require follow-up to resolve the issue) divided by total numbers of contacts handled by Agents – expressed as a percent.

**Full-time Agents:**A full-time Agent is one who works 40 hours or more per week, or for whatever comparable equivalent is used. In some cases, full-time Agents are counted at 36 hour per week. As this is an operational metric, the specific hours worked is less important than the number of Agents working in the capacity of a full-time Agent.

**Full-time Equivalent (FTE):** This is an operations and workforce metric that aggregates the amount of all labor used in terms of a full-time workforce. It is derived by adding the cumulative sum of labor hours for both full-time and part-time employees for a specified period and dividing its sum by 40. Centers that experience significant seasonality in staffing should discuss questions regarding this metric with their Senior Consultant.

Total FTE's = (total average hours of full-time Agents + total average hours of part-time Agents) / 40

Agent Type	Agent Head-Count	Average Hrs Worked /Wk / Agent	Total Weekly Hours	Full-Time Equivalent Hours	Total FTE's
Full-time	50	40	2000		50
Part-time	20	30	600	40	15
Totals	<u>70</u>	70	2600	40	<u>65</u>

## H

### Handle Time:

**Inbound Call:** The sum of talk time, hold time, and after-call work time.

**IVR:** The average amount of time a caller spends in the IVR before the caller either hangs up or is forwarded to the Agent queue.

**Outbound Call:** The sum of talk time and after-call work time.

**E-mail:** This is the total time, including after work time to process an e-mail transaction.

**FAX:** This is the total time, including after work time to process a facsimile transaction.

**Web Chat:** This is the total time, including after work time to process a web chat transaction.

**Postal Mail:** This is the total time, including after work time to process a White Mail transaction.

**Social Media:** This is the total time, including after work time to process a social media transaction.

**Other Productive Work:** This is the total time expended on any other productive work (e.g. back-office work) expended by agents during their work shift.

**Help Desk:** The term typically applied to a call center that primarily handles calls from employees about technical problems with their computer, monitor, printer, and the like.

**HoldTime:**The cumulative sum total of all hold time, divided by the number of calls placed on hold for the period measured. This measurement may also be derived from percent of calls held.

**Hoursper Shift(a.k.a. ShiftHours):**See Average Paid Shift Length in Hours.

## I

---

**InboundCallAuxiliaryTime:**See Auxiliary (AUX) Time in Percent.

**InboundCallsAverageSpeedof Answer:**See Average Speed of Answer (ASA).

**InboundCallsClosedonFirst Call:**See Calls Resolved on First Call.

**InboundCallsOffered:**The total number of calls that are directed (offered) to a contact center annually by their telecommunications provider. This number can be obtained from their telecommunications provider.

**InboundCallsHandled:**The total number of calls handled annually by a contact center. This metric is available in ACD reports.

**InboundCallsperAgentperHour:**This metric is calculated using the following formula: (60 minutes X Occupancy % X Utilization %) divided by the sum of (Average Talk Time in minutes + After Call Work Time in minutes).

**InboundCallsTransferred:**See Calls Transferred in Percent.

**Idle Time:**(See also Average Time Between Calls.) This is the average number of minutes during which the Agent is logged into the system in a “ready” state waiting for the next call, or in other words, the average idle time in minutes an Agent is in waiting mode between calls.

**InformationAccess:**An internal process designed to make all information needed by the Agent easily accessible on the Agent’s desktop for quick and accurate answers to caller’s questions. In theory, the Information Access process defines those access points used by Agents to tap into the knowledge base management system (KBMS) of the company.

**InitiateOutboundCalls:**This metric represents the average percentage of an average agent’s logged-in time devoted to initiating outbound calls.

**InternalMetrics:**These are generated by computers internal to call center technology (PBS, ACD, or VRU) or by departments such as Accounting, Finance, or Human Resources. Internal metrics are commonly perceived as “hard” numbers. Examples include average handle time, queue time, and abandon rate. These metrics generally do not reflect the view the customer has of your company.

**IVR (InteractiveVoiceResponse):**Technology that both routes calls and allows a customer to interact with the data systems by responding to a menu of options. Responses are typically entered by pressing the keys on the telephone keypad; however, voice recognition is becoming more commonly integrated into the process.

**IVR Containment:**See Percent IVR Containment.

**IVR OptOut:** Measured in percent, this is the number of callers who, during their call to your center, initially attempt to find solutions via the IVR, but then elect to speak with an Agent. This is not the same as those who choose to speak to an Agent as an initial menu option.

## **K**

**Key Performance Indicators (a.k.a. KPIs):** A set of quantifiable measures that contact center management uses to measure and evaluate their center's performance in terms of their operational and strategic goals. Common KPI metrics include cost per call, average speed of answer, hold time, occupancy, utilization, first call resolution, customer satisfaction and so on.

## **L**

**Labor Union:** A legally recognized professional body organized for the purpose of supporting the needs of its members through the collective bargaining of wages, benefits, and working conditions.

**List Penetration:** (See also Campaign List.) A telemarketing metric that measures the percentage of the daily calling list (or "campaign") that result in a completed live call.

**Live Connect Percent:** This is the percentage of calls made where an person answers divided by the total calls attempted. Within the live connects, you can measure "Right-Party (Decision Maker) Connect." Live connects do not include hang-ups, voice-recorders, call intercepts, busy tones, etc.).

## **M**

**Minutes of Telephone Usage:** This is the annual number of minutes of telephone usage by the call center for calls. This does not include the phone usage for executive, administrative, and support personnel. This number is often provided by your telecommunications service provider (the phone company).

**Moment of Truth:** MOT is a critical interaction between the customer and the product or service or employee that determines whether the customer will continue to purchase from the vendor.

**Multi-Channel Center:** In a multi-channel contact center, an Agent handles incoming and outgoing calls, e-mail, live chats, and other tasks such as letters, Faxes etc. as needed. Need is determined by contact center traffic levels as they occur randomly throughout the shift. This differs from a blended contact center in that the traffic flow is not forecasted, regulated, or managed on a business-rules driven, scheduled basis.

## **O**

**Occupancy:** This is the total staffed time logged in to the ACD (including ready/available, engaged on call, in ACW, or other active states) or other technology and is available to handle inbound phone, outbound phone, e-mail, chat and other productive work (white mail or back office work), divided by the total scheduled (paid) hours at work.

**Order Taking and Tracking:** See Call Types.

**OutboundCallCampaign:** For outbound call centers, a campaign is a specific operation to call a pre-selected list of individuals for a specific purpose. (See Outbound Call Types below.)

**OutboundCallTypes:** In benchmarking you can compare to others by call function in three distinct service call types: (1) Sales / Leads / Telemarketing; (2) Collections; (3) Surveys / Research / Follow-up Contacts.

**OutboundPerformanceMetrics:** These are all the measurements that indicate the performance of an outbound telephone Agent or contact center. Examples include Sales per Agent per Shift or measures related to results, revenue, or resolution.

**Outsourcing:** The process of contracting through a third-party, teleservices company to manage the call-handling experience for a company that: a) doesn't have the core competency to handle telephone calls from its customers, and/or b) has too many calls to handle for its existing base of trained Agents. The third-party teleservices company typically specializes in call handling as their only core competency.

## P

**Part-time Agents:** A Part-time Agent is one who works a schedule of less than 36 hours per week or whatever equivalent part-time cap is used by your center. As this is an operational metric, the specific hours worked is less important than the number of Agents working in the capacity of a part-time Agent, e.g., if an Agent works 30 hours part-time compared to 40 hours full-time, they are .75 equivalent.

**PBX:** A telephone switching device owned by a private company vs. one owned by a common carrier.

**Peer Group:** Peer Group most often refers to the call centers that have the same profile of activities as your company. For instance, a peer group might be all call centers handling mostly inbound calls that are mostly business-to-business in a call center of over 100 Agents for a company with annual revenues of over one billion dollars. Peer group does not necessarily connote competitors.

**Penetration Level:** See List Penetration.

**Percent Abandoned:** See Abandon Rate.

**Percent Agent Utilization:** See Agent Utilization Rate.

**Percent Attendance:** See Average Attendance in Percent.

**Percent Blocked Calls:** See Calls Blocked.

**Percent Calls Handled on the First Call (a.k.a. First Time Final):** See Calls Resolved on First Call.

**Percentage of Call Centers with a Formal Mechanism to Capture Caller Satisfaction:** See Caller Satisfaction Collection Process.

**Percent of Callers Giving a Perfect Score for Customer Satisfaction:** See Top Box Caller Satisfaction.



**Percent of Callers Giving the Lowest Score for Customer Satisfaction:** See Bottom Box Caller Satisfaction.

**Percent IVR Containment (aka, Percentage of IVR Self-Service):** This is the percentage of calls that were completely resolved within the IVR and were not forwarded to an Agent.

**Percentage Live Connects to Total Attempts:** This is the total number of calls answered by an person divided by the total number of calls attempted. This is not the same as Right-Party Connects.

**Percentage of Agent's Time Sent on Each Contact Channel** – The average percentage of an agent's productive time each shift devoted to the following channels/activities:

- Inbound Calls**
- Outbound Calls**
- Emails**
- Web Chats**
- Social Media**
- Faxes**
- Postal Mail**
- Other (including back-office work)**

**Percentage of Calls Placed in Queue:** See Average Time in Queue.

**Percentage of Calls Transferred:** See Calls Transferred in Percent.

**Power Dialer:** A power dialer is more than simply an automatic dialer. It not only helps connect and manage the call; it can personalize calls to existing customers by bringing up related customer history and personal preferences. This can help to convey the feeling that each customer is receiving preferential treatment.

**Predictive Dialer:** A type of autodialer. A predictive dialer dials ahead of Agents becoming available or when the predictive dialer matches a forecast number of available Agents with a forecast number of available called parties. These processes provide large increases in dial rates and Agent productivity.

**Preview Dialer:** A preview dialer automatically presents an Agent with contact information prior to dialing the number. The Agent has complete control over the dialing process and can inform the preview dialer if and when the call is to be placed. If the Agent does not wish to proceed with the call, the preview dialer can present another contact for the Agent to review. Preview dialing is an effective automated dialing technique when the Agent requires more control over the call process and may prioritize which contacts are to be made. Also, if the Agent requires additional time prior to the call to read through notes or call history, this technique is useful because it lets the Agent manage contact preview time.

**Public Business (or Branch) eXchange:** See PBX.

## Q

**QueueTime:** See Average Time in Queue.

## R

**Real-TimeExpertHub:** A process designed to enhance the probability that each call is completed on the first call. A Real-Time Expert Hub is often staffed by subject matter experts (SME).

**Re-directingInboundCalls:** See Call Types.

**Rejection:** The customer's state of mind such that disengagement from the current relationship has already been decided and has been or soon will be implemented. Negative word of mouth is likely to occur.

**RespondtoE-mail:** This metric represents the average percentage of an agent's time devoted to responding to E-mails from customers.

**RespondtoInboundCalls:** This metric represents the average percentage of an agent's logged-in time devoted to handling inbound calls from external customers.

**RespondtoOn-lineWeb-chats:** This metric represents the average percentage of an agent's time devoted to responding to Web-chat messages from customers.

**Right-PartyConnects(RPC):** This is the percentage of calls made where the intended party answers, divided by the total calls attempted. This is not to be confused with "Live Connect" which measures anyone providing a response to an outbound call connection

## S

**Semi-automaticDialer:** An Agent-controlled dialer. All actions (dialing, playing audio message, recording, and the like) are initiated by an Agent, normally with the press of a key. It is a productivity tool for telemarketing Agents.

**ServiceImprovement:** A process designed to use caller feedback from the call-handling experience to improve how future calls are handled. Properly implemented, it involves conducting caller feedback surveys, documenting complaints, fixing the caller's problem, and the process that caused the problems of the caller.

**ServiceLevel:** This is a broad-based term that is used to measure productivity; however, its use is not exclusive to the productivity of call handling. In contact centers it commonly defines X amounts of output in Y amounts of time. For example, 80 percent of calls answered in 20 seconds.

**ShiftsperYear:** On average, a full-time Agent works approximately 250 shifts per year for an 8-hour shift, or 200 shifts per year for a 10-hour shift. However, the number of shifts worked by part-time Agents may actually be more or less than this, depending upon the average length of shifts and numbers of shifts worked per year. This may also be interpreted as the average number of times that an Agent reports to work.

**SingleChannelCenter:**Contact Centers that support a single contact channel and/or Customer function only. (e.g., Inbound Telephone calls, Outbound Calls, e-mail, etc.).

**Skills–basedRouting:**Atechnologyenabling the routing of calls to Agents assigned a particular skill or set of skills. A common component of most ACD systems.

**SmartAutodialer:**A Smart Autodialer is an autodialer capable of personalizing messages and collecting touchtone or speech feedback. A speech engine is usually included for converting text to speech and recognizing speech over the phone.

**SpanofControl(AgentstoSupervisorRatio):** This is the total number of Agents, including leads (if used,) assigned to the control of each supervisor, expressed as a ratio.

**SpeechRecognition:**Atechnology designed to use interpreted human speech that enables people to interact with a computerized (telephone) system.

**StaffingModel:**TheWorkforce Management method employed by call center management to determine the optimal number of Agents to schedule per shift by using a third-party workforce management system or an in-house scheduling system. Blended staffing models are used to assign time spent on inbound vs. outbound call activity and occupancy.

**SubjectMatterExpert(SME):** This is a designation specific to an organization, business unit, process, or item this is assigned to someone who demonstrates exceptional levels of expertise, knowledge, and abilities in the performance of a particular job-skill, task, or function related to the topic: a person that has an extended sense or in-depth knowledge of a particular subject.

## T

**TalkTime:**See Average Talk Time.

**TechnicalSupport:**See Call Types.

**TelephoneGradeofService (80% of calls answered in xx seconds):**This is a productivity measure of the average time in seconds it requires for a center to answer 80% of its calls offered. This differs from standard service level measurements that set a goal in time to which the center shall attempt to handle a prescribed volume of calls within.

Use the following formula to calculate this value: Let X = your service level time; let Y = your service level percentage; S = the time in which 80% of calls are answered.  $S = (X \cdot .80) / Y$ . For example, if you answer 93% of your calls in 20 seconds, the results are as follows:  $S = (20 \cdot .80) / .93 = 17.20$  seconds.)

**TopBox AgentSatisfaction:**Thepercentage of perfect scores received on the question, “Overall, how satisfied are you with your position?” (A “highest” score of 5 out of 5, or the top of whatever scale you use.)

**TopBox CallerSatisfaction:**Thepercentage of perfect scores received on the question, “Overall, how satisfied were you with the service you received during your call to our center?” (A “highest” score of 5 out of 5, or the top of whatever scale you use.)

**Total Calls Offered:** See Calls Offered.

**Touch-point:** Touch-point is a “buzzword” for customer access channels. (See also Alternate Points of Contact, Customer Access Channels.)

**Turnover of Full-time Agents:** See Agent Turnover.

## U

**Up-Sell:** To sell a higher value product to an existing customer. For example, to lease a more expensive copier to an existing customer. (Also see Cross Sell).

**Utilization:** See Agent Utilization Rate.

## V

**Value-based Routing:** A programmable form of Skills Based Routing targeted at Customer Value where customers are ranked in revenue or sensitivity value and their calls are handled by designated Agents.

**Value Creating Gap:** This represents a performance gap where your call center is doing better than your peer group.

**Value Destroying Gap:** This represents a performance gap where your call center is doing worse than your peer group.

**Voice Response Unit (VRU):** See IVR.

## W

**Web Chat:** An interactive keyboard messaging exchange between a customer / client / individual and a customer support representative (CSR) conducted over the company’s Internet web site.

**Web Chat Session:** This is the total elapsed time from the beginning to the conclusion of an interactive Web Chat exchange, expressed in minutes.

**Workforce Management:** Related to Workforce Optimization, a process often used for call forecasting and Agent scheduling using historical call data. Other functions of workforce management may include skills-based scheduling, schedule adherence, time-off administrations, performance management tools and reporting

**Workforce Optimization:** A process designed to ensure that all Contact Center personnel with the right skills are in the right seats at the right times to maximize the call center’s productivity with the fewest possible resources.

**Wrap-Up Time (a.k.a. Wrap time):** See After Call Work Time.



**Appendix B: Tonchev Performance Index**

## 1. Introduction

Indexes have been widely used to measure the market performance of companies active in diverse industry sectors. However, as the business processes become more complex and inter-dependent there is an emerging need for a structural analytical methodology that thoroughly examines all the aspects of the company's performance. In response to this challenge, the Tonchev Performance Index (TPI) was developed to match the performance requirements of the Contact Center Industry. The index's objectives, structure, calculation and characteristics are briefly described in this paper to facilitate its understanding and utilization.

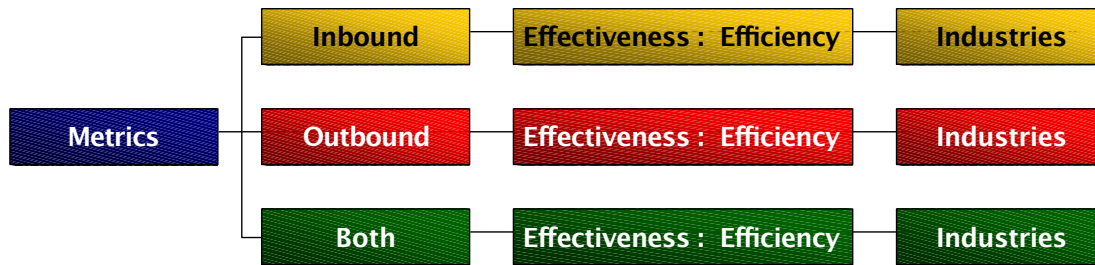
## 2. Objectives

The Tonchev Performance Index (TPI) has the following six objectives:

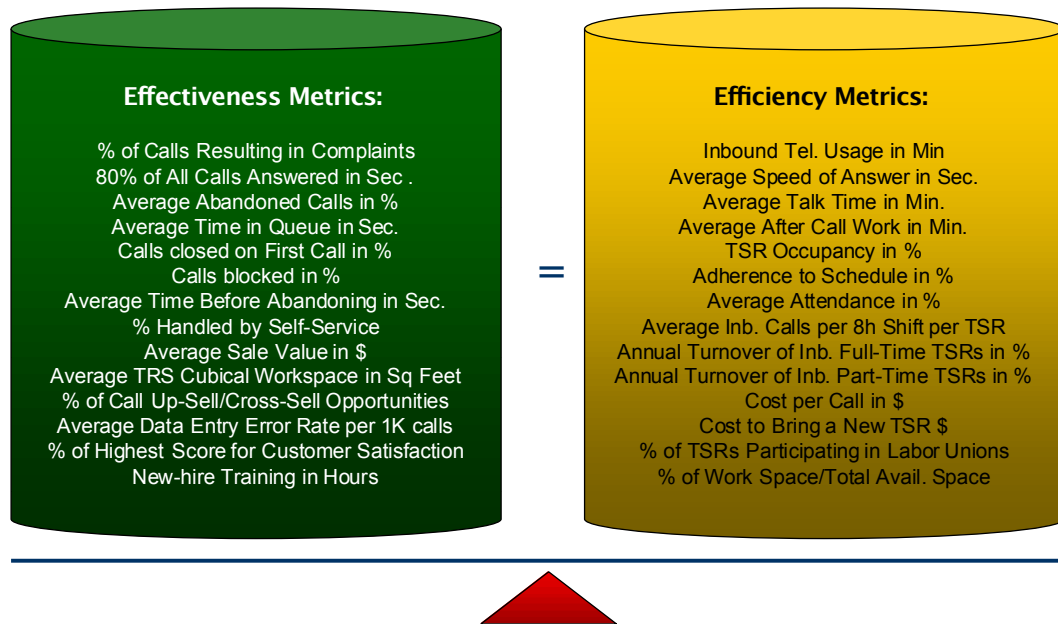
- 1. Business Performance Measurement:** to quickly and quantitatively describe a company's Contact Center as compared with its industry peers.
- 2. Effectiveness and Efficiency Balance:** to take into consideration the balance needed between effectiveness (quality) and efficiency (productivity).
- 3. Industry and Operations Sensitivity:** to evaluate the Contact Center's performance based on both industry and business criteria.
- 4. Mathematical Normalization:** to normalize all key performance indicators so that metrics are expressed in identical and comparative units.
- 5. Simplified Calculation:** to be easily comprehended, calculated and believed
- 6. Adjustment Allowances:** to allow adjustments and updates without major re-design.

## 3. Index Structure

Considering the above-mentioned objectives, the TPI index has a multi-level division of its composite metrics. The first division is by types of Contact Centers. Here, there are three possibilities: inbound, outbound, and both. For each of these three categories, there is a further split into equal amounts of effectiveness and efficiency key performance indicators. The idea behind this separation is to achieve a balanced model that realistically measures a Contact Centers' performance. Finally, the last metrical division is by industry types. (Please, see the two figures below.)



### A Balanced Model (example)



### 4. Index Calculation

The main TPI index's formula is:

$$TBPI = (Q - P) \times \frac{|Q - P|}{k}$$

Q = Effectiveness Metrics

P = Efficiency Metrics

k = "Out-of-Balance" Penalty Factor

$$Q = \sum_{i=1}^n C_{q,i} \times \frac{|KPI_{q,i} - KPI_{q, industry \_ average \_ for \_ i}|}{KPI_{q, industry \_ average \_ for \_ i}}$$

$$P = \sum_{i=1}^m C_{p,i} \times \frac{|KPI_{p,i} - KPI_{p, industry \_ average \_ for \_ i}|}{KPI_{p, industry \_ average \_ for \_ i}}$$

KPI = Key Performance Indicator

n = Total Number of Effectiveness KPIs

m = Total Number of Efficiency KPIs

n = m (Balanced Model)

KPI<sub>q,i</sub> = Effectiveness KPI

KPI<sub>p,i</sub> = Efficiency KPI

C<sub>q,i</sub> = Gap Direction Coefficient

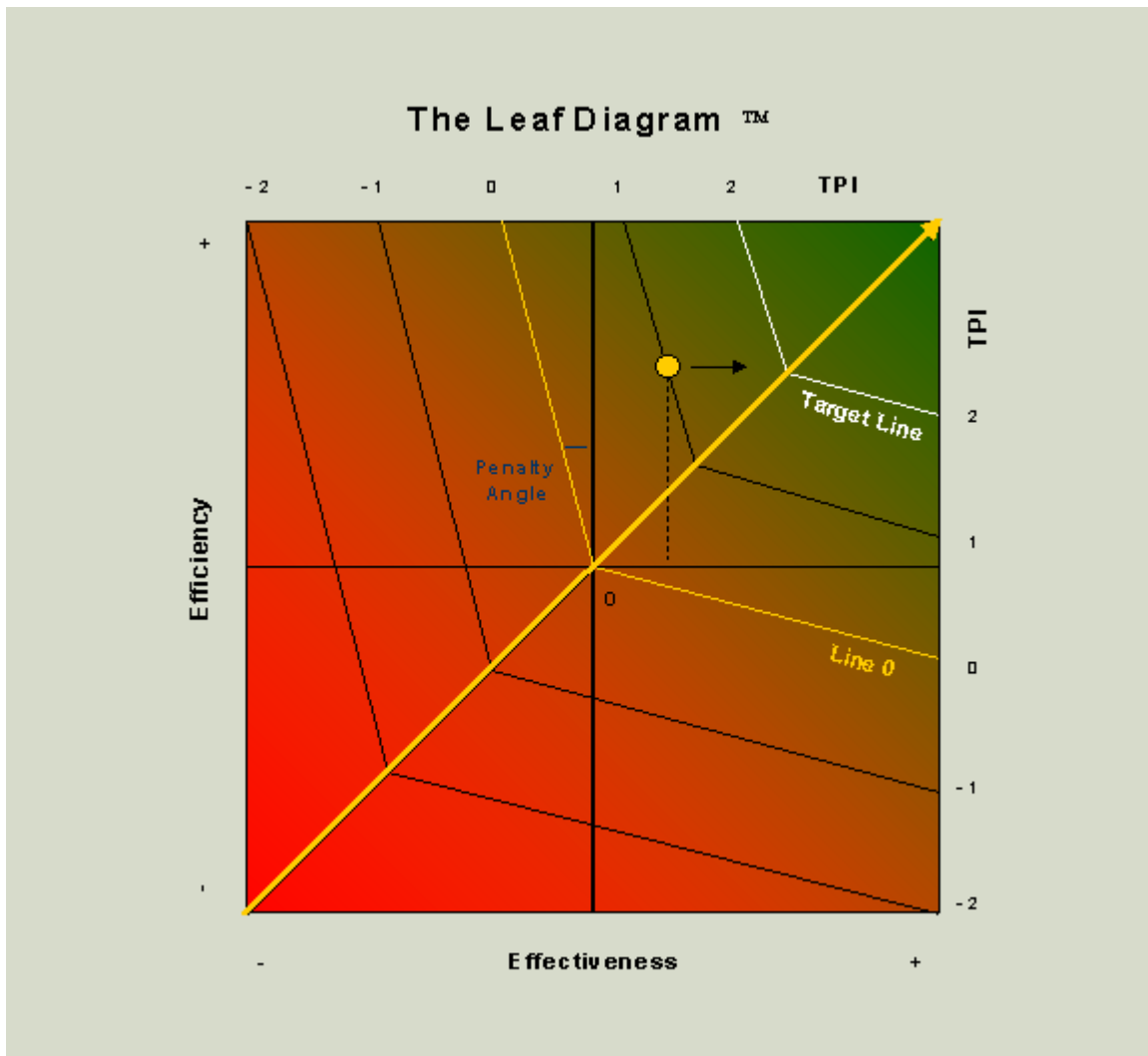
C<sub>p,i</sub> = Gap Direction Coefficient

## 5. Graphical Presentation of the TPI index

The Tonchev Performance Index is graphically represented by "The Leaf Diagram" (See the figure below). This diagram is a type of matrix with two axis: effectiveness and efficiency. Diagonally, across the center of the matrix, there is a yellow line that shows the balance between the two



parameters. Additionally, there are “Line 0” and “Target Line”. The first line shows the combination of points with TPI index equal to zero, whereas the second line points the desired performance. The slope of these lines determines how much a particular company is penalized for not being able to balance quality with productivity. The closer a given point is to the upper right side of the balance line, the higher the TPI index and therefore the better the performance.



## 6. Advantages and Limitations of the TPI Index

The TPI index differs substantially from the conventional performance indexes. Its main advantages and limitations can be summarized as follows:

### Advantages:

**Balance between effectiveness and efficiency** - Equal attention is paid on both goals. Therefore, if there is an imbalance between effectiveness and efficiency, the company's performance is penalized, and the index is lower.

**Transparent Results** - The index value tells exactly the company's deviation from the industry average. Depending on the performance, this value can be positive, neutral, or negative.

**Normalization** - All metrics included in the index calculation have the same units, namely they are all in percent, (%).

**Adjustability** - When necessary, the index allows updates and corrections.

**Comparability** - Since the company performance is measured by percentage deviation from the industry average, the index compares "apples with apples".

**Dynamics** - Except for the penalty factor, the index does not rely on static coefficients. Instead, it is based on dynamic industry data.

### Limitations:

**Database Requirement** - The index requires a large database.

**Pair Principle** - Since the index's effectiveness-efficiency balance must exist, the addition of new effectiveness metrics always has to correspond with the inclusion of equal amounts of efficiency metrics.

**Penalty Factor** - Even though the penalty factor has a logical justification its value can be biased.

## 7. Conclusion

The TPI index is a performance benchmark tool that gives a numerical value of the Contact Centers' performance. It is a balanced index that can be used for comparisons of different types of Contact Centers with various business operations. The strength of the TPI index is its simplicity and dynamic nature. It can help organizations to identify their weak areas and show the path leading to improved financial and market results. In conclusion, just as the finish time determines the performance of the long-distance runner, the TPI index is a single aggregate value that measures a Contact Center's competitive performance.



**Appendix C: Principal Investigators**



**Bruce Belfiore** is CEO and Senior Research Executive of BenchmarkPortal, which provides key performance metrics and offers best practices information to the customer contact industry worldwide.

Bruce is the host of CallTalk™, the industry's first online radio talk show dedicated to contact center topics. Through CallTalk and his frequent articles, he provides innovative thought leadership for the contact center sector.

He is the author of the books *Benchmarking for Profits!* a manual for best practices contact center benchmarking, as well as its sequel, *Benchmarking at its Best for Contact Centers*. Bruce has authored numerous White Papers and case studies on contact center topics, as well as being the principal investigator for BenchmarkPortal's benchmarking surveys and reports.

He is also head of the College of Call Center Excellence, which provides training curricula to contact center professionals at all levels through in-person, live-online and on-demand formats.

A dual national, Bruce has divided his career between North America and Europe, and has fulfilled work assignments in Asia and Africa as well. He formerly worked in the finance sector with international commercial and investment banks, and also worked with the Bain & Co. management consulting group in Italy. While in Europe, Bruce was also a speaker and writer on business topics in English and Italian.

He is co-inventor of a patent for a symbolic language system, Simbly™, with important contact center applications. Simbly, which uses nested symbols to encapsulate and standardize frequently-used text "chunks" has been shown in research to lower data entry time by 17 to 20%, and offers advantages to operations that must deal with more than one language.

Bruce holds an A.B. degree from Harvard College, a J.D degree from Harvard Law School, and an MBA degree from Harvard Business School, where he also attended the HBS Entrepreneur's Tool Kit program.

Bruce can be reached at [BruceBelfiore@BenchmarkPortal.com](mailto:BruceBelfiore@BenchmarkPortal.com).



**John Chatterley** is Director of Research and Analysis and a Senior Consultant for BenchmarkPortal, specializing in contact center performance analysis, technical writing, and content editing. John has published numerous customized benchmarking reports, research reports, One-Minute™ Survey reports, and White Papers.

John is chief editor/writer/analyst of BenchmarkPortal's annual series of detailed industry reports covering the broad spectrum of contact center industry sectors. He also chairs the Center of Excellence Certification panel of BenchmarkPortal. Mr. Chatterley has been and continues to be retained for his contact center expertise with numerous contact centers and consulting firms, both domestically and internationally.

He authored a comprehensive White Paper study entitled "Improving Contact Center Performance through Optimized Site Selection." Mr. Chatterley co-authored numerous books with Dr. Jon Anton, including:

1. "Coaching Call Center Agents,"
2. "Defining Customer Care,"
3. "Automated Self-Service Using Speech Recognition,"
4. "Listening to the Voice of the Customer,"
5. "Contact Center Management by the Numbers"
6. "Offshore Outsourcing Opportunities,"
7. "Selecting a Teleservices Partner."

John's professional career spans more than 25 years of experience in contact center management and consulting. Mr. Chatterley designed, implemented, staffed and managed three 500+ seat contact center sites in Arizona, Nevada, and California, and has extensive direct contact center operational management experience. He possesses first-hand experience at all levels of contact center operation including front-line technical support agent, supervisor, team lead, performance analyst, site selection and contact center design, contact center manager, and operations director.

John is a Certified Contact Center Auditor, Instructor and Analyst. WORLDWIDE WHO'S WHO recognized John by selecting him as a recipient of their coveted Worldwide Who's Who Lifetime Achievement Award representing outstanding professional dedication and career longevity. John's professional education was in Electrical Engineering & Computer Science at Southern Utah University, and subsequently at the University of Utah.

John can be reached at [JohnChatterley@BenchmarkPortal.com](mailto:JohnChatterley@BenchmarkPortal.com)



**David Raia** is a Senior Research Analyst and metrics database manager for BenchmarkPortal. He is also a Senior Consultant and is highly regarded in the industry as a Contact Center Operations Improvement Specialist. He began his consulting career in 1995 and spent 15 years successfully driving a variety of complex Contact Center Optimization engagements for Fortune 500 companies and Government agencies in the United States and Canada. Over the past five years, David has managed BenchmarkPortal's industry-leading KPI database and has been responsible for the expansion of the database into multi-channel and omni-channel metrics. He is a thought-leader in KPI analytics, gap analysis and ROI, as well as the impact of technology on performance metrics. His consulting areas of expertise include: reporting and performance management, workforce optimization, process reengineering, quality assurance programs, contact management, agent and supervisor training, market segmentation, business process outsourcing and virtual consolidations. David has been a featured speaker on many of these topics at a variety of national Contact Center and Management Seminars.

David enjoyed a successful thirty-year career in the telecommunications industry; holding a variety of line and staff managerial positions in Sales, Service, Strategic Planning and Finance. In his last assignment, he was the General Manager for a 1,500 seat multichannel and multi-functional national sales and service assistance center. He was responsible for introducing a leading edge expertsystemsknowledge and contact management platform to his organization that, with modifications, is still operating effectively today.

David can be reached at [DavidRaia@BenchmarkPortal.com](mailto:DavidRaia@BenchmarkPortal.com)



**Sergio Ramazzina** is BenchmarkPortal's IT partner for database management and report production. He is an experienced software architect/trainer with 25 years' experience in software design and development of a broad number of business-critical applications, including designing complex enterprise solutions in Java/JavaEE and Ruby. He has a very deep and broad experience in the IT field due to the large number of varied projects in which he has participated. He was a pioneer user of Pentaho products from the very beginning in late 2003, and has exceptional experience deploying Pentaho as an Open Source analytical engine, whether standalone or integrated in other applications.

In 2009 he began participating actively as a contributor to the development of Pentaho projects including JPivot, Saiku, CDF and CDA. He was designated a Pentaho Active Contributor as a result. He also began participating as a BI architect and Pentaho expert on a wide number of projects where Open Source BI and Pentaho were the main components.

In late 2010, he founded Serasoft, an Italian consulting firm specialized in delivering high value Open Source Business Intelligence solutions. The Serasoft team's mission is to design and deliver highly innovative enterprise solutions that provide companies with growth, efficiency and a measurable ROI.

He has published two books about Pentaho: *Instant Pentaho Data Integration Kitchen How-To* (July 2013) and *Pentaho Business Analytics Cookbook* (June 2014).

Sergio can be reached at [Sergio@BenchmarkPortal.com](mailto:Sergio@BenchmarkPortal.com)



**Appendix D: Partial List of  
Benchmark Participants**



**Catalog-Wholesale/Retail**

1-800-flowers  
 ALJ  
 Blair Corporation  
 Bob Barker Company  
 Bodybuilding.com  
 Buyseasons Inc.  
 Central Power Systems  
 Chico's  
 Eddie Bauer  
 Gopher Sport  
 Home Décor Products, Inc.  
 Horace Mann  
 Integrated Merchandising  
 Systems - Group II  
 Logicom Bilgi Teknoloji  
 Dagitim Ltd Sti  
 Manpower EU  
 MidwayUSA  
 Miles Kimball  
 MSC Industrial Supply  
 Musictoday  
 Network Direct Inc  
 PRC - Philip Morris  
 R&B, INC  
 Rent A Center  
 Silhouette Optical  
 Sleeman Breweries Ltd/CAC  
 Southern Fulfillment Services  
 Sysco Business Services  
 The Bradford Exchange  
 Ultradent Products  
 Victoria's Secret  
 VWR International  
 Wine Country Gift

**Chemicals / Pharma**

Ecolab  
 Monsanto  
 Mylan Pharmaceuticals, Inc.  
 Novo Nordisk Inc.  
 SABIC  
 Scherzinger Pest Control

**Computer Hardware**

Caleris

Cornerstone Medical Care  
 DB Sync Testing  
 Dell  
 HCL Technologies  
 HP  
 IBM  
 Motorola Solutions  
 RMZ  
 Siemens Government  
 Technologies  
 VeriFone, Inc.

**Computer Software**

asknet AG  
 Beeline  
 BidSync  
 CCC Information Services  
 DealerTrack  
 ExpressDigital  
 ezybus  
 Intuit  
 MakeMusic, Inc.  
 McKesson Automation  
 McKesson Pharmacy Systems  
 Midwest Real Estate Data  
 Mitchell International  
 Ovid  
 PLATO Edmentum  
 RealPage, Inc.  
 Sterling Commerce  
 Symantec.com  
 TaxSlayer  
 The SAVO Group  
 Thomson West  
 TREND  
 Wolters Kluwer Health

**Consumer Products-  
Consumables**

Alaven Consumer Healthcare  
 E J Gallo Winery  
 Giant Eagle Inc.  
 Herbalife Internacional  
 Herbalife USA  
 illy Caffè, N.A. Inc.  
 Jostens  
 Labatt Breweries of Canada

Mannatech  
 Meda Consumer Healthcare  
 Nestle Purina PetCare  
  
 Nutri-Health Supplements  
 Sleeman Breweries Ltd  
 Starbucks Coffee Company  
 Thorntons Oil  
 Wawa Inc.  
 Winn-Dixie

**Consumer Products  
Durables**

ACS  
 Acushnet Company  
 Advance Auto Parts  
 Alta Resources  
 Blinds.com  
 Braun Corporation  
 Cemcol  
 Columbia Sportswear  
 Euro-Pro  
 Event Photography Group  
 EXEO Consulting  
 John Deere  
 Kohler Co.  
 Multi Pure International Corp  
 Nebs Business Products  
 (Canada)  
 Newell Rubbermaid  
 Oreck  
 Shaw Industries Inc  
 Snap-On Incorporated  
 The Great Courses  
 The RoomPlace  
 Vistaprint

**Consumer Products-  
Electronics**

Jawbone  
 Motorola Solutions  
 OSRAM Sylvania  
 Panasonic  
 Research In Motion  
 Samsung  
 Snap-on Diagnostics  
 Sony of Canada Ltd

Wasla  
Western Digital

**Consumer Products-Non Durable**

British Petroleum  
Edward Don & Company  
L'Oreal USA  
Payless ShoeSource  
Sephora  
Unilever

**Consumer Products-Other**

AASA  
Affinion Group  
Bass Pro Shops  
Defender Direct  
Emery Waterhouse  
Entertainment Publications  
Giant Eagle, Inc  
Neill Corporation  
N.E.W. Customer Service Companies  
Nutri-Health Supplements  
Staples, Inc.  
Water Pik, Inc

**Education**

Academic Partnerships  
Academy of General Dentistry  
Athabasca University  
Georgia Perimeter College  
Normandale Community College  
Northern Virginia Community College  
Plante-Moran, LLP  
Rasmussen College  
Whitney International  
University Systems

**Financial Services-Annuities**

Allianz Life Insurance

E F G call center  
FATCO  
Fremont Investment & Loan Corporation  
HomeBanc Mortgage Corporation  
Horace Mann  
Lincoln Financial Group  
Mortgage Lenders Network  
Portico Benefit Services  
RES-Direct  
Standard Bank  
TIAA-Cref  
USAA SMS Life, Health & Annuity Service  
USAA Specialized Members Services  
Western National Life  
ZC Sterling- Lincoln Center

**Insurance -Health**

New Mexico Educators  
Federal Credit Union  
NYCB  
Orient Express Bank  
Pacific Capital Bancorp  
Pentagon Federal Credit Union  
Purdue Federal Credit Union  
RCU Member Loans  
Regions Bank  
Royal Credit Union  
Scotiabank  
Seacoast National Bank  
State Department FCU  
Synovus  
TD Bank Financial Group  
Teachers Credit Union  
The Bank of New York  
The Mauritius Commercial Bank Limited  
The Washington Trust Company  
U.S. Bank  
Umpqua Bank  
Vantage Credit Union  
Webster Bank  
Wells Fargo  
Zion Bank

**Financial Services - Brokerage**

Albridge Solutions  
Cambridge Investment Research  
Figliola Consulting  
Genworth  
GuideStone  
MetLife  
TD Ameritrade  
USAA SMS Brokerage & Mutual Funds Svc.  
Wells Fargo - Wealth Management Group

**Financial Services-Credit Card**

Alliance Data  
Desjardins  
Fidelity National Information Services - STP  
GE Capital  
Horace Mann  
Merchante-Solutions  
National Bank of Canada  
Pitney Bowes, Inc.  
RCI Leasing  
Vantiv-Financial  
WEX Inc  
Wright Express

**Financial Services -Other**

ARC Corp.  
Barri Financial Group  
Canon Financial Services  
Corporate Reimbursement Services Inc CRS  
Corporate Reimbursement Services Inc.  
Delage Landen  
Fairheads Benefit Services  
Fidelis Recovery Solutions  
FiServ VB CST  
Ford Motor Credit  
Hunter Warfield  
ING

JP Morgan Retirement Plan  
 MassMutual Financial Group  
 Mutual & Federal  
 National Bank of Canada  
 NT Services Ltd.  
 Proctor Financial Inc.  
 Provident Credit Union  
 Runzheimer International  
 Securian Financial Service  
 Triad Financial Corp  
 Unifica

**Freight-  
 Rail/Trucking/Shipping**

Aditya Birla Minacs  
 BNSF Railway Company  
 DHL International Pte Ltd  
 Integrated Merchandising  
 Systems - Group II

**Government –Federal**

BH Services Inc.  
 Department of Defense  
 (DFAS)  
 Department of Veterans  
 Affairs  
 Financial Mgmt Serv. - US  
 Department of Treasury  
 Federal Reserve  
 FOD Economie  
 Pearson Govt. Solutions  
 Security Assistance Corp  
 Peninsula Inc.  
 United States Coast Guard  
 US Department of Labor  
 USPS  
 Veterans Administration  
 Vangent Inc

**Government, Local**

Austin 3-1-1  
 City of Austin  
 City of Berkeley  
 City of Chesapeake  
 City of Edmonton

City of Fort Wayne  
 Durham One Call  
 Halton Region  
 New York City  
 Health and Hospitals  
 RTA

**Government-  
 State/Provincial**

Department of Veteran Affairs  
 - Health Resource Center  
 Michigan Department of  
 Treasury  
 North Carolina Department of  
 State Treasurer  
 OCSS (Office of Child Support  
 Services)  
 Ontario Lottery & Gaming  
 Corporation  
 OPS  
 State of Ohio Dept of Taxation  
 Texas Department of  
 Licensing and Registration  
 VicRoads

**Government-Service  
 Providers**

Anthem 4 - Med B  
 Canadian Broadcasting  
 Empire Medicare Services  
 Fidelity National Home  
 Warranty  
 Oak Hill Technology, Inc.  
 Ontario Ministry of  
 Government Services  
 Oxford Properties Group  
 Sentinel Offender Services  
 Tri-County Metropolitan  
 United Government Services-  
 WI

**Government: Service  
 Providers, Health Care**

American Medical Association  
 Amerigroup

Colorado HCPF  
 Health Net Federal Services  
 Maximus-(multiple locations)

**Health Care–Medical  
 Equipment**

Abbott Labs  
 Bio Rad Laboratories  
 Broan-Nutone LLC  
 Coughlin & co  
 Dental Fix Rx  
 Hear USA  
 KCI  
 Medtronic  
 MLSNI  
 Parata Systems LLC  
 Roche-Multiple locations  
 Ultradent Products

**Health Care–  
 Provider/Hospitals**

Advocate Health Care  
 Allina Hospitals - SB  
 CCHMC  
 Fairview Health Services  
 Gamma Dynacare Medical  
 Laboratories  
 Great-West Healthcare  
 Hennepin County Medical  
 Center  
 I. U. Heath Physicians  
 LabCorp-Multiple locations  
 Mayo Medical Laboratories  
 McKesson  
 Medical University of So Car.  
 Methodist Health System  
 MultiCare Health System  
 Oakwood Healthcare  
 response marketing  
 Rural Metro Corp  
 Santa Clara Family Health  
 University of Michigan Health  
 System  
 WakeMed  
 WellSpan Health  
 West Monroe

**Health Care-Support Services**

Acclaris  
 ADP  
 American Medical Response  
 Ascension Health  
 Blue Cross Blue Shield of IL  
 BlueCross BlueShield of FL  
 Bright Horizons  
 Brother International-OmniJoin  
 Cardiovascular Consultants  
 Clariant  
 Crothall Healthcare at BIDMC  
 CustomerElation  
 Department of Veterans Affairs  
 ECardio Diagnostics  
 EPBS Intermedix  
 LabCorp-Multiple locations  
 LCA Vision  
 LifeCare Inc.  
 LifeScan  
 Maximus-Multiple locations  
 Mayo Medical Laboratories  
 McKesson-Multiple locations  
 MedAssets  
 Onlife Health  
 Optum Health  
 PAREXEL  
 Pharmacy Solutions Abbott  
 Philippine Psychiatric Association  
 Quest Diagnostics  
 Restat  
 Scan Health Plan  
 SXC Health Solutions  
 United BioSource Corporation  
 University of Michigan  
 Viracor-IBT  
 Virtua Health

**Immediate Response Services**

AAA (Multiple locations)  
 ACP Services, LLC.  
 Auto Club Enterprises  
 MedicAlert Foundation Intl

**Insurance -Health**

AFLAC  
 AMA Insurance Agency  
 Amalgamated Life  
 Assurant Employee Benefits  
 Blue Cross Blue Shield- (Various locations)  
 Caresource  
 Cigna  
 Community Health Group  
 Community Health Plan of WA  
 CoreSource, Inc  
 Corvesta Services, Inc.  
 Deloitte  
 Delta Dental-Multiple locations  
 EyeMed VisionCare-Multiple locations  
 Hallmark Services Corporation  
 Inland Empire Health Plan  
 LifeSecure Insurance Company  
 Mayo Medical Center  
 Medica  
 MESSA  
 Michigan Education Special Servicess Assoc. - MESSA  
 Molina Healthcare of Washington  
 Neighborhood Health Plan  
 New Directions Behavioral Health  
 Northeast Delta Dental  
 POMCO Group  
 Samaritan Health Plans  
 Sento Corporation  
 South Central Preferred  
 Southland Benefit Solutions  
 The Regence Group  
 Tufts Health Plan  
 United Concordia Companies  
 United HealthCare  
 USHEALTH Group

**Insurance -Life**

AAA Member Services  
 Abc consultants  
 ACE  
 Allianz Life - C.S.  
 American National  
 AXA Equitable  
 Bankers Life and Casualty, a Consecro Company  
 CNO Financial Group  
 Farmer's New World  
 Insurance Company  
 Forethought Life Insurance  
 Guarantee Trust Life  
 Insurance Company  
 Horace Mann  
 Lincoln Financial Group  
 Metlife  
 Mutual of America  
 Mutual of Omaha  
 New York Life-Multiple locations  
 New York Life Mutual  
 NYLAARP  
 PPS  
 Principal Life Insurance  
 Securian Financial Group  
 Sun Life Financial  
 Symetra  
 The Foresters

**Insurance -Other**

1dental  
 Aflac  
 AIG United Guaranty  
 American Family  
 Ameritas Group  
 ARAG  
 Banesco Seguros  
 Corvesta Services  
 EMPLOYERS  
 Hagerty Insurance  
 HSG CodeBlue LLC  
 Hyatt Legal Plans, Inc.  
 MetLife-Multiple locations  
 Industrielle Alliance  
 Motion Picture & TV Fund  
 NTUC Income

PFP Services  
 Proctor Financial Inc.  
 Revolv  
 Safe Auto Insurance Company  
 Traveler insurance services  
 ZC Sterling – Raleigh

**Insurance –Property & Casualty**

AAA-Multiple locations  
 Allied Solutions  
 Allstate  
 American Family Insurance  
 Amica Insurance  
 Church Mutual Insurance Company  
 GE Fleet Services  
 Grange Insurance Company  
 Hagerty Insurance  
 Horace Mann  
 Liberty Mutual Claim Contact Center  
 Mang/NBT Insurance Agency  
 QBE –Multiple locations  
 SafeCo Insurance  
 Sterling National Corporation  
 The Hartford  
 Travelers Insurance Company  
 Veterinary Pet Insurance.

**Help Desk**

Media Temple  
 American University  
 Applied Systems  
 Apriva  
 ARC Corp - CHD  
 Blue Cross and Blue Shield of Minnesota  
 Bright Horizons  
 Brother International-Software Support  
 Canon Canada Inc.  
 Canon U.S.A. Inc.  
 Cars.com  
 C-net  
 Datamatic

Delta Dental of MI, OH and IN  
 Ecolab - Aqua Balance Support Center  
 Farmers Insurance-Services  
 FARO Technologies, Inc.  
 Federal Reserve Bank of St. Louis  
 InsideSales.com  
 McKesson-Help Desk  
 McKesson Pharmacy Systems  
 Snap-on-Technical Support  
 Motorola Solutions  
 Northwestern Mutual  
 O1 Communications  
 OE Connection, LLC  
 OneSource  
 Oxford Properties-Support  
 Plato Edmentum  
 Pontoon (formerly Adecco Solutions, Inc.)  
 Portico Benefit Services-Help Desk  
 Quality Sourcing  
 Samsung IT  
 United Guaranty  
 USCG Operations Systems Center  
 Vantiv-Merchants  
 Vivint

**Manufacturing – Industrial/Construction**

ADI  
 Atlantic Power, Inc.  
 Briggs & Stratton Corp  
 Emaar MGF Land Limited  
 Ferris Industries  
 GAF  
 Kennametal  
 Mid-West Engine Warehouse  
 OTIS Elevator Company  
 Pella Corporation  
 Power Source Canada  
 Preferred Power  
 SEDCO, Inc.  
 Snapper

The Timken Co  
 Zurn Wilkins

**Manufacturing –Light**

AOPA  
 CFE  
 Datamatic  
 Datamax Corporation  
 Dee Zee, Inc  
 FARO Technologies, Inc.  
 Johnson Controls Inc.  
 Moen Inc  
 Netafim USA  
 Rain Bird  
 Remington Arms Company  
 Sauder Woodworking  
 Techsonic Industries  
 Tyco Safety Products  
 Uniforms To You  
 Vita-Mix Corporation

**Manufacturing– Transportation**

Bombardier Aerospace  
 Chevron  
 Fiat  
 Prestolite  
 Volkswagen of America

**Media –Infomercial/Direct Marketing**

Alliance Teleservices, Inc  
 Costco MX  
 eHarmony.com  
 ShopNBC  
 Teligence Communications

**Media–Publishing/ Newspaper/Magazine**

AutoTrader.com - Consumer Division  
 Concordia Publishing House  
 ETS  
 Harlequin Distribution Center

John Harland  
The Arizona Republic  
The Teaching Company

**Media-TV/ISP/  
Cable/Dish/Radio**

AG Young & Associates, Inc  
Arbitron  
BenchmarkPortal  
CBC  
Comcast  
HOT  
Look Communications Inc.  
SelectSource  
Shaw Cable Systems  
The RM Factory

**Not for Profit**

Academy of General Dentistry  
AOPA  
Bobby Dodd Institute Inc  
BloodCenter of WI  
Family Life Corporation  
MedicAlert Foundation Intl  
NurseAdvice New Mexico  
The Arc of Virginia  
The Relationship Mktg Factory

**Other**

3M Company  
Adecco NA  
Answer 1 Communications  
AnswerNet  
Associates  
BloodCenter of Wisconsin  
Carondelet Health  
CBN  
CDS Global  
City of Regina  
Convergys  
Co-Operations  
Customer Research, Inc  
Cyber City  
eBay  
Ecolab Inc.  
Fantasy Entertainment

Foundation CCC  
Hallmark Business  
Connections  
Hammersmith  
Mudd Advertising  
Neill Corporation  
Nestle USA  
Pfizer  
QIAGEN  
Quiznos Sub  
RDI Marketing Services, Inc.  
RealPage Inc  
Redcats USA  
Sonda Procwork  
Trialcard  
West Corporation

**Professional Services**

aca research  
Adecco Solutions, Inc.  
Affinion Group  
Aon Hewitt  
ASQ  
Asseco  
Callmax Dominicana  
CDW  
CSC  
Deloitte Consulting  
Grandtech Technology  
Hear USA  
LegalZoom  
Orrick Herrington  
PWC  
Reliance Industries  
Securitas  
Securitas USA  
Thriving Business Solutions  
Unicom Teleservices

**Telecom -Cellular/Wireless**

ACC  
AT&T WiFi Services  
CCCL  
Globe Telecom-Innove  
Communications  
Harte-Hanks (Samsung STA)  
I-Contacts Corporation

Maksen  
Samsung STA  
SingTel  
STC  
Sykes  
U.S. Cellular  
Verizon  
VIPnet  
Warid Telecom

**Telecom -Service/Landline**

Access Integrated Networks  
Algotech  
Beijing 95teleweb.com  
Belize Telemedia Limited  
Birch Communications  
BroadStar  
Broadview Networks  
BullsEye Telecom  
Cablevision MX  
Farlep  
Focus Services  
Fusion Contact Centers, LLC  
Group O  
IPA  
MCCI  
MTS Allstream  
Nevada Power  
Nextel Communications  
Argentina S.A.  
Senture, LLC  
Shieff services  
Socket  
TBayTel  
Tunisia Telecom

**Telecom -Technology**

Assistt  
Azerfon LLC  
CJSC Comfortel  
CSG Systems  
Digitrust Group LLC  
Encompass Teleservices  
FIS  
HCL  
Iowa Telecom  
NII Holdings - Argentina

PeopleNet	vegas.com
Perfect Presentation Co	Viator
PLDT	
PT Infomedia	<b><u>Utilities –Energy Reseller</u></b>
Siemens Enterprise	Chilquinta Energia S.A
Communications	Compania Nacional de Fuerza
TechTeam	y Luz
	Dayton Power and Light
<b><u>Toll Operators</u></b>	Direct Energy-TX
91 Express Lanes	Electrabel
ACS for E-ZPass New York	Manpower
ACS-Fastrak	OGE
E-470 Public Highway	Petrobras
Authority	ProCore Solutions
Egis Projects Canada Inc.	Reliant Energy
ITR Concession Company	Telus –Multiple locations
Transroute International	Union Energy
VE Systems	
Xerox-Multiple State Toll	<b><u>Utilities –Investor Owned</u></b>
Road locations	AGL Resources Inc.
	American Electric Power
<b><u>Travel &amp; Hospitality</u></b>	Aqua America, Inc.
Accor North America	CenterPoint Energy
ACS - Red Lion Hotels	Florida Power and Light
Airbnb	Louisville Gas and Electric
AvisBudget Group	and Kentucky Utilities
Best Western Intl.	Minnesota Power
British Columbia Ferries	San Antonio Water System
Carlson Hotels - Omaha	Transat
Cendant	Vectren
Coasts Hotel and Resorts	
Delaware North Companies	<b><u>Utilities –Municipal</u></b>
Delta Hotels	Blue Stakes of Utah
Diamond Resorts International	Citizens Energy Group
Hertz	Citizens Gas
Hyatt Hotels and Resorts	City of Atlanta
InnLink Central Reservation	Greenville Utilities
Services	Indianapolis Power & Light
JetsGo	
P&O Ferries Ltd	
Promociones Marriott	
RCI	
Starwood Hotels & Resorts	
Starwood Vacation Ownership	
Transat	
Travel Focus	



**Appendix E: Community Resources  
& Product Listing from  
BenchmarkPortal**



## BenchmarkPortal's Mission

**At BenchmarkPortal, we believe every contact center professional can make a difference for each customer experience. Everything we do is about discovering and sharing better ways to optimize those experiences.**

To fulfill this mission, we conduct original research on the contact center sector and offer a menu of products and services that have proven useful to managers around the world.

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## Contact Center Certification

The Center of Excellence recognition is one of the most prestigious awards in the customer service and support industry. The certification process is management's best path to a world class customer contact operation.

A contact center that has been certified as a Center of Excellence by BenchmarkPortal has met and/or surpassed rigorous standards of efficiency and effectiveness. This certification is unique in that its achievement is ascertained strictly "by the numbers." This means that the BenchmarkPortal team audits and verifies the center's key performance indicators and compares that data to data from other peer organizations. This is different from other types of contact center certifications that typically focus on less results-oriented measures, such as process handling methods and procedures.

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## Contact Center Benchmarking

Benchmarking is now recognized as an essential function for a properly managed customer contact center. The competitive insights and aids to decision-making that are offered through benchmarking are so compelling that managers cannot do without it and still consider themselves in line with professional standards.

In 1995, BenchmarkPortal's founders conducted the first scientific, industry-wide benchmark study at Purdue University, under a grant from IBM.

Now custodian of the world's largest and most respected database of contact center metrics, BenchmarkPortal individualized reports. These reports provide managers the information to:

- Compare their performance against an appropriate peer group of Contact Centers
- Make optimal, fact-based decisions regarding investment, personnel, procedures, etc.
- Formulate recommendations on how to improve their contact center
- Determine if they qualify for BenchmarkPortal's Contact Center of Excellence Certification

Through our reports, as well as our leading edge research, we aim to contribute to the continual improvement processes of individual customer Contact Centers, and ultimately to improve the performance of this vital sector as a whole, worldwide.



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## Contact Center Training

BenchmarkPortal manages The College of Contact Center Excellence (originally developed by us for AT&T) to offer training and certification for Managers, Supervisors, and Agents. The College of Contact Center Excellence offers one of the most highly sought after Contact Center Training Certification programs in the world, led by the industry's top-rated instructors, with over 150 years combined experience. These courses will equip you with the skill set that you need to improve your Contact Center's performance. You will be able to return to your business and drive effective change for your contact center.

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## Contact Center CampusWeek

BenchmarkPortal's Contact Center Campus week is an annual, unique industry event that presents an opportunity for attendees to get on the fast track to upgrade customer service and to drive their Contact Centers' performance to the top.

Industry experts, along with BenchmarkPortal's premier team of instructors, will lead and guide classes and group discussions that explore Contact Center challenges and emerging trends in the industry. The two-day symposium at the end of the week - unlike any other - features talks and discussions to inspire innovative thinking and engage participants in exploring compelling avenues for advancing the Contact Center industry



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## Contact Center Assessments and Customized Consulting

BenchmarkPortal will help your contact center balance customer expectations and financial objectives by identifying the metrics that will drive success. Our assessment process will make performance gaps more obvious and will help pinpoint the initiative that commits a minimum of resources to achieve the best performance results. Note that BenchmarkPortal also offers customized consulting on a range of contact center issues (IVR optimization, WFM, consolidation, multi-center organization, center reengineering, HR issues, training improvement, technology selection, outsourcer selection, etc.)

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## Industry Reports, White Papers, Research Reports

We have turned many of our best practice research initiatives into Industry Reports, White Papers and Books. BenchmarkPortal's Industry reports are the industry's richest source of Contact Center information. As the economy and business goals change, our reports can provide critical information that will ultimately affect your bottom line.

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iBenchmark automates the process of benchmarking, transforming a valuable but time-consuming, manual process into an automated, user-friendly service that allows managers to monitor performance on a monthly basis. Monitoring your Contact Center performance on a monthly basis will allow you to make decisions and select improvement initiatives that will have measurable impacts on the financial and operational performance of the contact center. iBenchmark thus represents a major step forward for Contact Center decision-makers.

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### Top 100 Contact Centers Contest

BenchmarkPortal sponsors this Annual Contact Center Benchmarking Study, which features the "Top 100 Contact Centers" Contest for centers located in North America.

Thanks to your participation, our benchmarking surveys and reports have become the recognized data source for forward-looking managers around the world.



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### CallTalk Online Radio Show

A fun and exciting on-line program for education and learning, for the customer service industry. Broadcast monthly, directly over the Internet to your desktop, CallTalk covers informative and educational topics that impact today's Contact Center. CallTalk airs without the participation of vendors so that topics will be free from their influence and guided by the needs of its listeners. Interested parties can access the archive of programs by visiting the BenchmarkPortal website at [www.BenchmarkPortal.com](http://www.BenchmarkPortal.com)

