

Making Your Dashboard a Living, Breathing Window on the Contact Center
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“Most of the information a manager will need to run a business will reside on a computer screen in a ‘digital cockpit.’ It will contain every piece of real-time data, with automatic alerts spotlighting the trends requiring immediate attention.”

- *Jack Welch, former CEO, General Electric; Straight from the Gut, 2001*

In the contact center industry, digital cockpits, also known as performance dashboards, are still perceived by some as futuristic instrumentation from a science fiction show – full of gauges, fancy gadgets and flashing lights. Actually, what Jack Welch spoke of in the future tense just four years ago is already here. Not only that, it is mission-critical to addressing the day-to-day issues of contact centers. So let’s demystify the digital cockpit and put it to work as a practical tool. Here’s a nuts-and-bolts, layman’s guide for implementing a contact center dashboard or cockpit.

The Best Information, Blended to Perfection

In any environment that uses information, the quality of that information is critical. Therefore, a cockpit or dashboard – using the terms interchangeably – is useful only to the extent that it provides accurate information, which depends on the data fed into it. Data that derives straight from the source, for example, tends to be more accurate than second-hand data. And, the less manual input, the better. Just as importantly, the data presented on a dashboard should reflect the goals of the organization. Technology in and of itself cannot answer all questions and solve all problems. It depends on the homework behind it. One of the reasons performance management system deployments can fail is that the goals are not clear or have not been properly vetted by those in the organization who set them in the first place. Managers need to take the time to establish clear and attainable goals before putting any system in place.

Specifically, the usefulness of a contact center dashboard depends on the right blend of four types of information:

- *Focused information.* The dashboard should focus on four or five performance areas, maximum. These might include: efficiency metrics, such as number of calls answered; quality metrics such as number of single call resolutions; effectiveness metrics such as average dollar revenue per call; and overall summary performance information such as total dollars up-sell revenue per hour/day/week. The data should be concise and straightforward; a clutter of fanciful displays and graphs can be confusing. Moreover, it needs to be actionable – in other words, information that can quickly be turned into positive actions.
- *Recent information.* The dashboard aggregates the latest, actionable information not necessarily all displayed at the same time, but integrated into the functionality of the dashboard. Thus, the information is readily available without switching programs and specific views can be created by each user and accessed on demand.
- *Near-historical information.* Most contact center platforms combine two types of reporting. One is a real-time snapshot of the latest reporting interval, say 15 or 30 minutes. The second is historical information, which is aggregated throughout days, weeks or months. While both are vital, historical information does not work as well in delivering data that can be immediately put into action. More useful than historical information is *near-historical* information, which captures the current day's or current week's data, as appropriate for the industry, and seamlessly integrates it with the real-time information.

- *Full historical information.* The best blend of information on the dashboard is primarily real-time and some near-historical information, with the ability to deliver full historical information for comparative purposes.

Within those categories of information, drill-down capability is essential to speedy action and better decision-making. A broad corporate view is not enough to spot where corrective action is required. In a large call center of 500+ people operating in multiple teams and with multiple services, for instance, the activity of only one or two teams may be driving the entire metric in the wrong direction. Managers and supervisors must be able to drill down to the right level to identify the source of the problem and correct it.

Equally important is the ability to segregate information. In environments where different teams are assigned to outbound and inbound calls, for examples, managers need to be able to segregate the information to identify performance problems. And, in a blended environment where the same agents work both outbound and inbound calls, the allocation of staffing resources depends on the ability to segregate the two types of activities.

When contact center employees have access to the right types of information in the right combination, they will be able to meet their targets. “A dashboard is an information vehicle designed to improve performance,” says Dan Coen, President of Call Center Today, a company that provides custom-design consulting for call center organizations, and author of *Building Call Center Culture* (DCD Publishing, 2001) and several other books on call center management. “The key to an effective dashboard is customization. It has to incorporate the metrics that are essential for a specific organization.”

Less Is More

The best rule of thumb for dashboard content is: Less is more. Decide on four or five metrics (number of calls received, average speed to answer, number of one-call resolutions, etc.) and sum them up as a view. If additional performance indicators are needed, allocate them to several different views, which blend seamlessly to make up the entire performance picture.

Avoid cluttering the dashboard with the following:

- *Too many numbers.* Some think of a dashboard as a canvas of numbers, i.e., the more numbers it displays, the better. Unfortunately, according to psychologists, people can easily focus and produce results on no more than seven items. That doesn't mean a dashboard has to consist of only seven items. There can be many other metrics driving those seven key items, as long as agents, supervisors and managers are trained in understanding the importance of the primary seven and how they relate to other metrics. "If it's not a measure you're looking for, don't put it on the dashboard," says Coen.
- *Too many or the wrong graphics.* Visual displays have to be designed with people's ability to comprehend in mind so they can quickly grasp the information and take action on it. Don't display information in a pie chart that is more suited to display in a line or bar graph.
- *Agent-specific performance information.* Supervisors and managers need to know what agents are doing as a group, so they can manage them and provide assistance as needed. While it might be advantageous at times for a manager to drill all the way down to this detail, agent-specific detail belongs on the agents' desktops so they can gauge their own performance. This empowers them to better manage their own activities.
- *Strategy-based performance metrics.* If the goal is to achieve 99 percent customer satisfaction, identify the *operational* metrics that support that goal. Some might include

having all calls answered within 35 seconds, 85 percent one-call resolution, etc.

Operational metrics that roll up to strategy will achieve the goals of the center.

- *Information that is not actionable.* Avoid information that gets in the way of action. Keep data simple, easy to decipher and actionable. While a dashboard should provide drill-down capability, data requiring a what-if analysis or modeling has no place on it.

A contact center that knows its goals and has done its homework in terms of defining tactics and metrics can drive and reinforce strategy through its view over the different performance areas being managed. When managers, supervisors and agents have all the actionable information in front of them, they can make better decisions faster than with traditional methods of aggregating information. “Perhaps the greatest value of dashboards is the instant availability of real-time information,” says Coen. “Whether technical or human resource-related, any problems and their source are immediately apparent and can be corrected.”

If a call center is not getting value from its dashboard software, the problem may not be technology, but training, according to Coen. “It’s very common to purchase a dashboard program, or any software tool, but then only utilize five percent of its capabilities,” he says. “The key to stop wasting money and time on new technology is to train people to make full use of it.” For call centers now contemplating dashboard technology, Coen recommends developing an RFQ, request for quote, to define exactly what is needed. “The main purpose of the RFQ is not to present it to vendors, but to achieve clarity on requirements,” he says. “It will determine the right questions to ask and measure the adequacy of the answers.”

The Magic of Quality

Outsourced contact centers in developing countries are often unjustly regarded as being of inferior quality. Dashboards can be very effective in creating the proper perception of higher

quality, to both employees and clients, regardless of the country in which the contact center is located. Additionally, the dashboard connects management to contact center operations that might be located overseas. This “window” on remote agents can be very valuable in providing outsourcing clients with important information 24 x 7, regardless of location. However, a dashboard in and of itself will not enhance the quality of a contact center. Only when it is maintained as a living, breathing window on the contact center will the dashboard enhance quality and serve to achieve corporate strategy.

Before magic can happen, the groundwork must be laid. Don’t just implement a dashboard because it’s the newest technology coming down the line. First, do the homework. Understand the organization’s goals and objectives, and define the business drivers. Then, develop and install a few simple, understandable metrics. Continue to adapt the dashboard to the organization’s needs, replacing or adding metrics and features as needed. Always keep the dashboard agile and easy to work with. It should be a plate filled with only the choicest bites, never a smorgasbord.

Five Steps to an Effective Dashboard

1. *Start simply.* Select a couple of metrics or performance areas that are absolutely essential. A mosaic of every bit of company information will only be confusing and an implementation and maintenance nightmare.
2. *Do the homework.* Define goals and metrics well. Since business drivers, and therefore dashboard metrics, depend on the industry, the dashboard can only drive performance if it is adaptable to that industry’s drivers and metrics.
3. *Keep adapting.* No matter who designed the dashboard, don’t be afraid to make changes.

4. *Test.* Since the dashboard has to suit the environment, managers and supervisors should walk the dashboard through the full range of possible contact center scenarios to make sure it's a living, breathing window on the contact center.
5. *Stay focused.* Remember that everyone is responsible for achieving corporate strategy. Therefore, managers and supervisors have to be able to drive strategy down to the individual call center agents. Computer-generated animations of pretty graphics, contour charts and three-dimensional, multiple-axes bar graphs may look cool on dashboards, but if people don't comprehend the information they represent and cannot take action on it, it is of little value and could in fact do more harm than good.

About the Author:

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