

## Metrics at the Agent Desktop: Using Valuable Real Estate Wisely



The information published to agent desktop screens and how the agents use it is their lifeline to their personal success and the success of the organizations they serve. Vendors of agent desktop software know this and have strived to improve the ease with which screens can be accessed and navigated as well as the clarity of the information on those screens.

Traditionally, statistics pertaining to calls in queue, longest call waiting, etc. have been relegated to a readerboard mounted on a nearby wall in efforts to not clutter the desktop real estate. This is changing today as centers become more geographically distributed and many agents work from their homes. More companies are relying on the availability of key metrics at the desktop to keep an agent connected to the transaction ebb and flow of the center. Instant messaging and other real time communications tools have also gained in popularity as managers look for ways to extend the reach of their management, sometimes thousands of miles away.

Given that the agent desktop must be ergonomically arranged to be as efficient as possible, managers must decide what the agent needs to know to perform effectively. Moreover, managers must find ways to eliminate non-actionable data at the agent desktop.

Centergistic has a few tips to think about before using agent desktop metrics.

### Personalize the metrics to fit the agent's goals

This sounds obvious, but often very little effort is put behind deciding what the optimum metrics are for each agent. Is the information actionable? Tie the information on the desktop to the agent's specific targets. Many of today's performance analytics software can combine information from several sources, so be creative. Information such as daily revenue targets or trouble tickets handled can be put right in front of the agent, alongside their progress towards those goals.

My PTP \$ 1000	My \$ Coll 200	% of PTP \$ 20
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*The sample above would be used in a collections center, indicating status of an agent's secured promises to pay or "PTP"s. The metric ribbon uses conventional green-yellow-red color coding to indicate threshold levels.*

If the information is simple and quickly grasped, the desktop real estate will not be compromised and the result will be evident in better performance. But first do your homework and know your goals. Agents in blended centers with multiple goals and types of transactions need to keep their attention on the desktop. You may want to consider a threshold-activated alert screen pop as an alternative; a metric ribbon that can fit in the bottom menu "tray" that only pops up when a threshold has been reached or exceeded.

## TMI!!

Staffed 12	Connects 192	RPC 170	% PTP 71
PTP 120	ATT 5:25	AWT 2:46	\$ Commit 95,238

The above desktop metrics may require too much work from the agents to decipher acronyms and decide what action, if any, to take. They may in fact not be actionable in which case they only cause confusion and frustration.

What is “too much information”? A topic of much debate, although most experts adhere to the Science of Display, which states that at any given time an agent cannot handle more than 7 pieces of information. We recommend even less. That means that the layout should be simple. Metrics should be quickly grasped and not require the viewer to calculate anything. Once again, make the information work for your agent, not against him or her.

## Inform, don't distract!

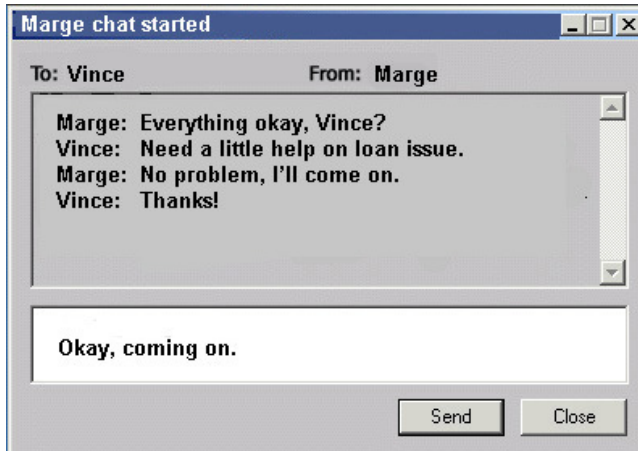
Metrics should be always there but not made to pop up over a transaction screen or database. The agent should be able to see the metrics instantly, almost subliminally. The metrics should never impede an agent's ability to enter data or access information.

Campaign	Parent Campaign	Purpose	Objective	Response Type
Investment Objectives		Contact customers re investment	Update profile and open investment	Opportunity
Get more Auto for Less		Increase our auto insurance mark	Increase our auto insurance market	
Develop awareness among busi		Develop awareness among busi	Develop awareness and attract mar c	
Health Insurance		Increase our sales of health insur	Increase our sales of health insuranc	
Homeowner Coverage		Sell more homeowners insurance	Sell 10% more homeowners flood ins	
Stock for your savings bal		Increase our SPP policies issued	Increase our up-sell on SPP policies	Response
Expense Checking Account		Contact customer about new prod	Increase number of checking account	Opportunity
Checking Account Acquisition		To increase the checking account	Increase checking account balance	Opportunity
Equi Loan		Contact customer about our new l	Increase the consumer loan base	Opportunity
Acquire Credit Card		To acquire more credit card custo	Increase credit card customer base b	Opportunity
Summer 2000 New Investments		This campaign is designed to open		Opportunity

The above sample shows a metric ribbon placed on lower right portion of screen for easy viewing, yet out of the way of transaction area.

Don't ask the agent to go hunting for key metrics. Information should always be there, right in front of them, not hidden in another program or portal. If an agent has to “do” something or “go” somewhere to get the information, chances are they will not and the metrics are wasted.

## Limit Instant Messaging



Instant messaging can be very effective. Above it is used to help an agent without interrupting the flow of the call.

Go light on instant messaging: There are situations where messaging is necessary. Remember that every instant message potentially interrupts your agents. If you have dashboarding software that indicates an agent has been on a call for a long time, a quick "everything okay on this call?" allows a quick response. Avoid over using IM tools.

*Centergistic Solutions provides integrated real time and historical analytics and professional services for multi-media contact centers and general businesses, throughout the world. Its flagship product, **AgentView® Enterprise** is an award-winning integrated real time and historical analytics systems currently installed in thousands of contact centers worldwide. Centergistic is headquartered in Irvine, California, with offices in Mexico City and London.*

*For more details on the information contained in this release or Centergistic Solutions and its line of products and services, contact Susan Saldibar, Vice President, Marketing. All Centergistic products can be viewed on the corporate website at [www.centergistic.com](http://www.centergistic.com).*