Group Presentations

Summary

Group 1

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5 Most Common Metrics

1. CSAT

2. Productivity — ticket volume, total interactions, solved, solves / hour

3. AHT — cost / contact

4. Adherence / occupancy — WFM metrics

5. FCR

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CSAT

Pros:

- Can be more agent / contact focused
- Easy to get + accessible metric
- Directly from the client + valuable insights
- More targeted than NPS

Cons:

- Uncontrollable → related to a non CX driven thing
- And creates issues if an agent KPI
- Subjective — customers want different things from agents
- Limited sample size
- Polarized
- Reactive
- Agent association is a challenge
- Causes Issue avoidance

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Productivity — Ticket Volume, Total Interactions, Solved, Solves / Hour

Pros:

- If you nail the metric → it can be really helps show how people are doing, influence coaching
- Effective in measuring cost
- Effective in forecasting the need for workforce

Cons:

- Long tail in terms of resolutions. Can take a few weeks to wrap someone up
- Multiple sources for productivity
- Different teams silo'd in their specialty
- International transfer team → could take 8 weeks to get done
- Different solve goal than their "training" platform
- Not One Size Fits All
- Team Transfers make it hard to calculate
- Attribution of who is actually spending the time

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AHT — Cost / Contact

Pros:

- Easy to understand how it impacts cost
- Helps with forecasting
- Can identify types of contacts that might be more challenging or systems that need improved

Cons:

- Not good at measuring CX
- Could lead to job avoidance
- Doesn't tell the full story
- Different channels, different systems

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Adherence / Occupancy — WFM

Pros:

- Helpful for forecasting
- Provide stability for agents
- Helpful so that customer are being supported

Cons:

- Burnout when over prioritized
- Could lead to messy work
- Big brothery

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FCR

Pros:

- Lets you know if agent got it right the first time — most valuable for Saks
- Very much in the contract of them (not the customer)

No Cons

Metric Exploration

Optical Company + Luxury Resale → **Customer Effort**
- Cons → platform limitations
- Pro → believe in effortless experience

Optical Company → **more reliable FCR**

Luxury Retail → Shift to **Sentiment** from NPS and CSAT (% change)
- Like it a lot — highly insightful
- Breakdown conversation into 4 sections and tracts % change
- Challenge is getting senior leadership to buy in b/c they don't understand it

Financial Company — **Maestro Analytics / AICs**
- High effort chat
- "Fancy Finance Jargon"
- Word count for chat (low is bad, too high is bad)

Data in CX

Democratized access at TV Streaming Provider and Financial Company:

- Pro: Creates culture of transparency
- Cons:
  - Can be super slow to load
  - Low engagement with Agents, mostly leads that look at it
  - Can be confusing sometimes

Limited access at Optical Provider:

- Both for Agents, but also for Leadership + cross functional teams

Luxury Resale:

- Google sheet scorecard 3 times a week
- Consistently need to defend the metric accuracy
- "The people vs. Billy"

Group 2

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Top Metrics

Time to Resolution

Pros:
- Understand agent ability to understand customer issues

Cons:
- Fast resolution doesn't necessarily equal a great customer experience

Tickets volume for number of Active Users

Pros:
- Provides a more accurate understanding of current support capacity
- Helps understand the scope of an issue (ex. 0.5% of customers reach out about 1 issue and this is 70% of support tickets)

Cons:
- Can be inconsistent to compare over time frames (ex. if a major event or incident happens can skew)

CSAT

Pros:
- Industry standard

Cons:
- Can be highly dependent on the whims of a customer on a specific day

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Top Metrics

First contact resolution (FCR)

Pros:
- Insight into productivity for the first contact

Cons:
- First isn't necessarily the best resolution

Adherence

Pros:
- Can be a helpful investigate metric

Cons:
- Not a true representation into agent productivity

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Top Metrics

QA score

Pros:

- Maestro 😊
- Contextualizes CSAT, TTR, or FCR
- Identify potentially trends in compliance

Cons:

- Can be small sample size
- Requires alignment across graders

Top Metrics

- First Contact Resolution (FCR)

- Time to Resolution (RT)

  - Solves per day

- Average Handle Time (AHT)

- Ticket volume per number of active clients

- Adherence

- QA Score

- Acceptance rate

- CSAT score

New Metrics Exploration

- Diluting pool of metrics
  - Why shift away from industry standards?

- Understanding and agreeing on Incentivization

- QA score for Ranking Agent Performance

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Data Experience

- Compliance + properly restrict access to specific data
  - BPO concerns
  - Cross agent, team lead, graders

- Accessibility into third party vendors

- Alignment on metrics
  - Vendor vs. internal definitions
  - Data dictionary

Group 3

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Top Five Metrics

1. **Nursing Agency:** Service Level, CSAT, handle time, QA, resolution time, one touch solves

2. **Shipping Software Provider:** CSAT, NPS, resolution time, first response

3. **Fitness Service Provider:** QA, CSAT, first response

4. **Office Supply Retail:** Re-opens, QA, response time, CSAT

5. **Mental Health Software Services:** NPS and SLA for execs, productivity and CSAT for CX, productivity

Themes: CSAT, resolution response time

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CSAT Pros + Cons

- Difficult for agents to control
  - Ex: (Nursing Agency) surveying termination letters

- Customers can reward agents for bad behavior
  - Ex: ~100% CSAT on waived fees at (Fitness Service Provider)

- Requires customer effort
  - Ex: Very low response rate on 10-question survey

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Productivity Pros + Cons

- Handle time: varies by contact type and channel
  - Ex: (Nursing Agency) surveying termination letters

- Response time: depend on contact volume
  - Ex: New Year's rush at (Fitness Service Provider)

Quality Pros + Cons

- Flexible metric that drives other KPIs

- Not the metric execs ask about (compared to SLAs, CSAT)

Data Experience

- **Nursing Agency** ⭐ — Use Domo, dashboards per persona (admin, ops). Data gets shared with agents, but do not have access. Brandon builds reporting 😀
  - Beautifying data is important to grab attention / tell a story

- **Fitness Service Provider** — pull data together through spreadsheets, tableau exists but sometimes metrics are broken. Weak point is not having cohesive trustworthy place to bring together

- **Mental Health Software Service Provider**— has internal data resources in CX which makes it easy to iterate
  - Agents have access to a spreadsheet that's driven by Looker. Everyone can see everyone's metrics — no secrets here

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Democratizing Data Experience

- Culture of transparency with data

- Everyone should have access to know how they are performing

- Should all agents see each other's data?!
  - Creates friendly competition → Taylor Swift effect 😉

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Data, Metrics & Everything Else

Current Metrics

- QA: Highly reliable / not looking at 100% of tickets
- CSAT CSAT CSAT!: True reflection of client experience / responses are either really high or really low
- Productivity (AHT, One Touch Resolution, FCR): Related to proficiency / unbalanced and don't always reflect the full customer experience
- % of AI Handled vs. Agent Handled: Attracts cost efficiency / must be paired with quality metric to reflect full experience

Exploratory Metrics

- Triage Rate — easily measure how AI has performed when routing / can lead to bad CX and unneeded multi-touches
- Agent vs. Bot CSAT — easily compare how chatbot performs vs. agents / difficult to train chatbots
- Number of Public Responses — clear that more reponses = DSAT / sometimes unavoidable given situation

Data — authoritarian approach, too many cooks in the kitchen & need to set clear expectations

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Group 5

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CX Org Metrics

Metrics

- QA
- Productivity
  - Touches per hour
  - Total solves
- FRT
- CSAT
- Adherence
  - Acceptance rate
  - Occupancy

Challenges

- *AHT doesn't always indicate quality service*
- *Accuracy around AHT or FCT — varying definitions*
- *Adherence harder to track with homegrown tools*
- *Occupancy hard to measure as we can't see what agents are doing but leadership wants it a core metric we coach to*
- *Going to several systems to pull data; data extremely isoled*

Wins

- *AHT dropped when we started comparing vendor to vendor; sparked healthy competition*

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Exploring KPIs

Example: Roku

New KPIs: OAC – Overall Advisor Score (QA, incorrect refunds, attendance, CSAT, AHT)

Win: TV Streaming Provider: Ability to measure and compare vendors with one score comprised against several metrics

Challenges: Hard to calculate at first, still manual process through sheets

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Data Experience

- **Current challenges:**
  - High degree of data silos
  - Most were pulling data from several sources and managing in sheets (very time consuming and manual process)
  - Everyone is struggling to get resources to make the dashboards they want to see
  - Leadership has access to dashboards but Management did not
  - Agents don't have access to data

- **Future state:**
  - On average Managers or Leads would get 8+ hours back a week if they had all data in one place (spending an entire day pulling data for team and prepping for 1:1s)

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Group 6

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Part 1

Top Metrics — General Themes

	Pro:	**Con:**
CSAT	Trends for bad behavior (ie: agent consistently has low CSAT)	Subjective and does not tell the whole story
SLA	Great for the company to hold the vendors or internal agents accountable for response times	This metric only tells how quick the response to the customer is and does not result in resolution. Lead to repeat.
AHT	Understand which agents/BPO's can handle more volume for positive cost analysis	Fight between leadership to see reduced times vs. CX desire for agents to personalize conversations and spend more time making sure all issues are resolved

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Part 2

First contact resolution
- Pros**:**
  - Insight into repeat calls
- Cons:
  - You tell me?

Data experience
- General theme is that multiple program, tools, stakeholders lead to data being all over the place

How are we connecting data?
- "People are reporting on the weather vs. providing true insights"
  - Because there is no central access to the data

How are you democratizing metrics to your CX org?
- "Business is making the decision while the CX team is making the mess"
  - Involving them in the conversations earlier

Jobs To Be Done — Wins

Agent Performance General Themes

- **Problem statement:**
  - Agents handling the same type of interaction have different outcomes
  - Agents receiving 100% resulting in targeted QA (Clothing Retail Company)
- **Job to Done:** Deep dive into these processes to understand why agents resolving differentiating
- **Outcome:**
  - Policy changes
    - Resulting in consistent agent / customer outcomes
 - Rubric changes (Clothing Retail Company)

Common Challenges

Agent Performance General Theme of Challenges

- **Problem statement:** Sample size is small due to limited QA resources and technology. We know certain behaviors are happening but we can't see the scale at which this is occurring

- **Job to be done:** Root cause analysis

- **Outcome:** Lead to agent performance improvements, policy changes. High level of effort to understand and see trends at scale

Key Takeaways on Jobs

- **Agent performance trends:** Use targeted QA and coaching to improve behaviors + improve policies

- **BPO:** Measure BPO's using GraderQA / calibrations to ensure they are being held to consistent standard

- **AI research:** Ability to see trends at scale to know where to target QA (agent performance, policy, etc.)

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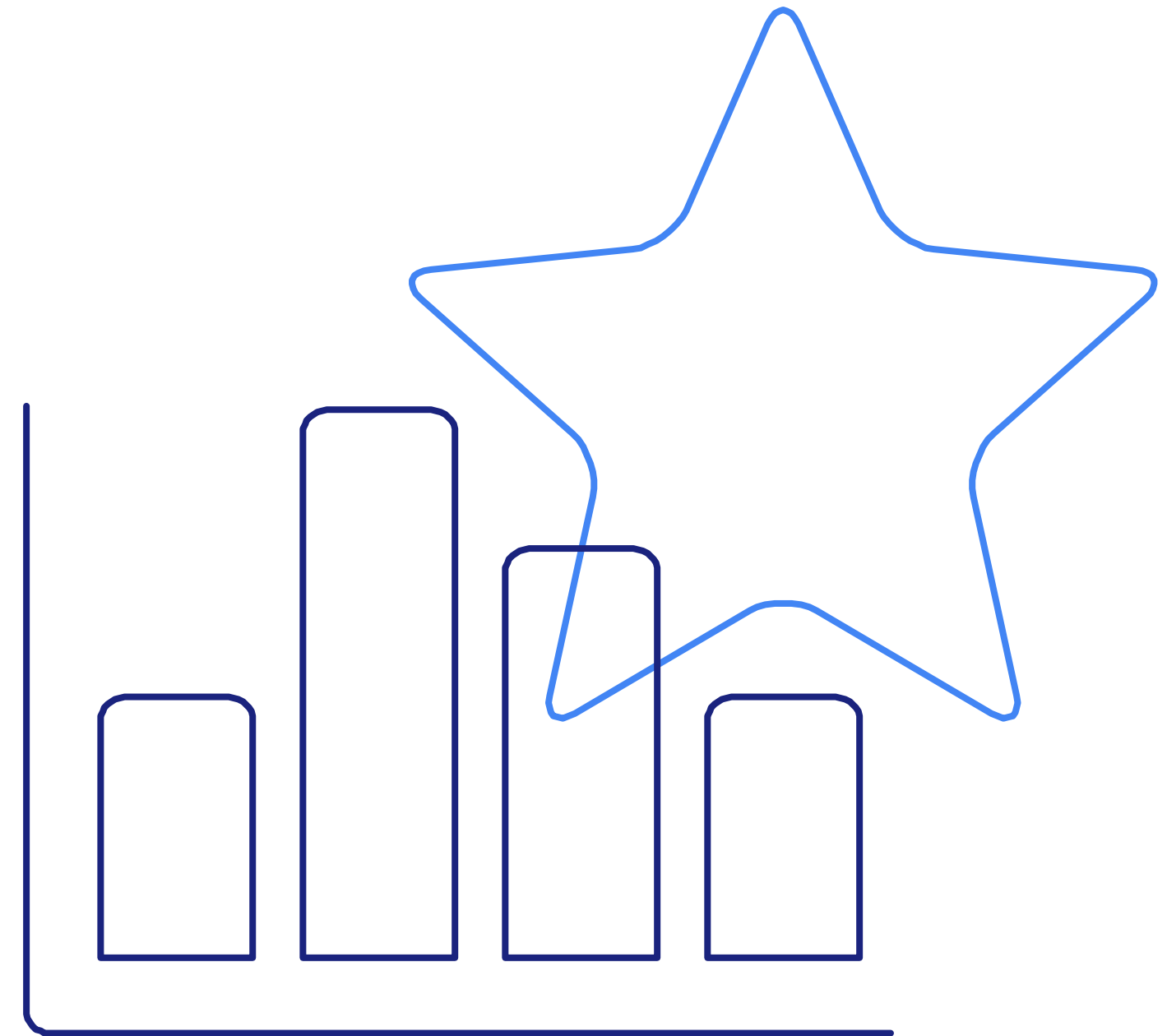
Where Have Impact; Priorities and Jobs To Be Done (cont.)

1. Measuring agent performance; insights into agent performance
   a. Success Stories
      i. Online Sportbook Service Provider: new product. Want to direct customers there than reach out to get their referring information. Find out if the agents are referring customers. Reached out to George to build out a report to find out how often mentioned
         1. Got # calls and # of mentions
         2. Coach agents to refer to the referring hub to lessen reach outs
   b. Challenges
      i. Work Marketplace Services Provider: are you grading for this or grading for that. Work with CX directors to make sure grading things that they are looking for. Non-gradable section for the analysts to raise things that may result in changes to be made.
         1. They're team is "customer experience improvement" rather than "QA"
            a. Look beyond just the interaction to see if larger process change to make
         2. QA process leads to process change but leadership often doesn't see that because process changes don't call out being made based on learnings through the qa process, so leadership mostly just looks at qa as a police force to make sure agents haven't done something wrong rather than what value the qa program really delivers
         3. So much information and feels like just barely touching the surface of what's in there. Share a weekly business review, but she mostly doesn't know what to do with all of the data. Can see something is trending in a certain direction but often doesn't have the sample size she wants and isn't sure what to do with it anyways — seems like always training as the outcome

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Where Have Impact; Priorities and Jobs To Be Done

    ii.   Sometimes trainings and processes change for the same thing and it can confuse the agents because they learn to do the same thing three different ways. Debating if should make changes less, e.g. only after a quarter or two, to really let the change set in

    iii.   BPO graders are bias and want to give their agents good scores. So, they want to either lean into grade the grader or bring it in house. Alternatively, automated insights and a computer grading may be a better experience than human graders and agents feeling that there is human bias… a computer and objective thing may be better.

    iv.   Connecting one metric to following things… long handle time vs. short .. also really matters if the customer is going to call back / does call back

    v.   BPOs always seem to be operating at 100% even though they aren't… will submit appeals for anything less. Important for their comp / contract.

        1.   Found some success in bringing the BPOs to the table in creating rubrics rather than just using theirs or just using the internal one without them

        2.   Also found success in redefining the range… that 75% is their 100% and 100% is the customer is ecstatic and way above and beyond

2.   Silos; BPOs being siloed

3.   Targeted QA + RCA

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Key Shared Metrics

- **CSAT**
  - Pros — Understanding customer sentiment
  - Cons — Does not offer details of agent process
- **QA score**
  - Pros — Gives deeper insight into agent process, helps to fill metrics gaps
  - Cons — Doesn't always capture full customer sentiment
- **FRT**
  - Pros — Helps us understand how quickly customer issues are being addressed
  - Cons — Quick response doesn't equate to a quick resolution
- **Productivity**
  - AHT, tickets solved

Unique Metrics

- **Matt — Mental Health Services Provider**
  - *Adherence — getting agents to be online when they're supposed to (90% goal)*
  - *Occupancy — amount of time agents are working (under 80% occupancy rate goal)*
    - Pro: Truly identifies that team is ready to help customers
    - Con: QA can become "Time Police"
  - *Conformance — total amount of time that agent is working against total scheduled time*
    - Pro: better understand burnout factor and allows Matt to observe PTO metrics
- **Escalation rate, reopens rate**

QA Metrics

- **QA score**

- **Alignment score (BPO's and management)**

- **Grading percentage of total ticket queue**

Data Silos

- **Compiling the same information in 10 different places because all stakeholders access data in different locations**
  - Spending more time compiling data than acting on it
  - Wants to make sure there is a universal source of truth

- **Lots of exporting and adding into metrics into spreadsheets**

- **Sharing metrics that are not actionable**
  - Unnecessary "noise"
  - Working to eliminate metrics that agents don't have a direct impact on

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Driving Data to Action

- **Managers coaching agents to key performance metrics**

- **Looking for larger coaching trends amongst agent groups**

- **Utilizing appeals process to help coach both agents and graders within QA program**

- **Emphasis on compliance and constantly improving processes to get ahead of future issues**

Comments

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