



## Contact Center Performance Management solution helps nationally ranked outsourcer become highest performing partner for Fortune 500 Communications client

### ***CEScore proves to be the perfect tool for driving KPI performance***

#### **Customer Care Contact Center Operations**

Contact centers are vital to the ongoing success of many organizations and most, if not all, Fortune 500 companies. Whether the contact center is engaged in outbound or inbound communications, sales or customer care, help desk or order fulfillment, you know the importance of achieving targeted response times, service levels, sales, call quality, customer satisfaction and agent efficiency.

A company's brand is built on customer touch points. As the first point of live contact in many situations, an organization's contact centers are perhaps the most critical touch point an organization has with its customers. Customer interactions can make or break an organization's brand image.

#### **The Challenge:**

Out of 20 different contact center operations handling customer interactions for a global communications client, Convergent Outsourcing, one of the US' largest BPO providers – accountable for more than three thousand agents and multiple domestic and offshore locations – ranked poorly based on all of the Key Performance Indicators required by the client (many via SLA). Due to its low comparative performance ranking, Convergent was not only unable to fully capitalize on its relationship with the client or maximize the performance bonus earnings available, but was at risk of losing the client altogether. The challenge seemed insurmountable as Convergent was underperforming in every KPI category, including first call resolution, dollars collected, customer satisfaction scores, transfer rates and attrition. In addition, internal metrics, such as attendance, employee satisfaction, occupancy and utilization were also less than satisfactory resulting in consistent missed profitability targets.

Convergent was losing the confidence of their largest client. In an effort to save the relationship and reverse the trend of poor performance, a comprehensive internal SWOT analysis was conducted from which the following list of weaknesses was documented.



- 1) We spend too much time and still rely on spreadsheets to pull data together from separate systems (CMS, quality monitoring, attendance, home grown, etc.) to create reports needed by supervisors, trainers, managers and executives.
- 2) Information overload. While reports are abundant, they are stale due to inefficient collection and distribution, don't provide direct/actionable intelligence to users, and are often no more than a collection of uncorrelated values and statistics about the operation that are not organized in relation to our defined objectives and expectations.
- 3) Our existing tools aren't capable of telling us who are our best or worst performing agents - considering all relevant (often dynamic) KPIs.
- 4) We are vulnerable to risk of wrongful termination or related disputes with agents and other personnel due to subjective or inconsistent performance review criteria and/or processes.
- 5) Our agents don't have consistent visibility to the specific criteria upon which their performance (and compensation) is measured.
- 6) We are often ineffective and struggle to communicate a common understanding of the contact center's mission, goals and KPIs across our organization and among all categories of personnel.
- 7) We lack a centralized system for team communication, alerting, coaching, quality monitoring, customer surveys and other functions.
- 8) We lack the capability to tie achievement of defined performance levels to bonus compensation and/or other incentives and integrate that information with our payroll system.
- 9) Rollout of performance management process and policy adjustments is slow and inefficient.

The Threats and Weaknesses were clear, but the SWOT analysis also validated that Convergent had undeniable Strengths – in highly qualified people, intelligent enterprise and performance management methodologies/processes as well as best-in-class contact center infrastructure technologies. What lacked was a solution that could connect all of these assets, codify and automate our operational processes and provide a way to align and empower their team in a consistent and cohesive way.



## **Determining the Right Solution:**

After completing the SWOT analysis, Convergent met with existing vendors to share their concerns and challenges. Some offered possible solutions through products they had previously implemented, but none offered a platform, features or capabilities close to what they had in mind. Convergent then conducted their own research and sought input from outside advisors for help. This process led to a solution category they were not particularly familiar with called Contact Center Performance Management (CCPM) and ultimately – a proprietary implementation of TouchPoint One’s leading Contact Center Performance Management platform, Acuity (a 2014 Ventana Research Technology Leadership Award winner) - that Convergent branded internally — *CEScore*.

## **Gaining Stakeholder Buy-in:**

Convergent learned from the first meeting with leadership from TouchPoint One, that they are almost purely ROI-driven in their approach to solution positioning and validation for every prospective new client. They came to the table with a determined interest to understand Convergent’s business and challenges. This process was highly consultative addressing all of the concerns raised during the SWOT analysis as well as additional value that could be delivered through the Acuity-powered CEScore CCPM solution. The effort involved a series of product demonstrations and work sessions in which use cases were developed that mapped to Convergent’s specific needs. These customized presentations demonstrated Acuity’s relevance to Convergent’s challenges and provided evidence of the solution’s ability to address them in a manner consistent with what they’d envisioned.

*"From senior executives, to business analysts, supervisors, IT and HR, Convergent personnel across multiple departments were involved in the solution evaluation process. Had we abandoned the discussions at the conclusion of just this phase, we'd have taken away meaningful value from our relationship with TouchPoint One," commented Convergent President, Casey Kostecka.*

To achieve CFO support and complete stakeholder buy-in, TouchPoint One crafted a custom ROI calculator in which the CEScore value proposition was line item articulated and mapped to anticipated financial outcomes. The need for a solution had been defined and the planning efforts with TouchPoint One had now provided a solution path and tangible methodology to validate fit as well as value. With this, unanimous stakeholder buy-in to move forward was achieved.



## **Assessing CEScore Implementation Resource Requirements:**

Given that CEScore implementation would touch users from agent on up to senior executive, the full implementation involved a variety of Convergent personnel.

Much of this work was completed during the solution evaluation phase, i.e. defining KPIs, data sources, KPI weights, performance ranges, etc. and how the data would be imported into CEScore. A TouchPoint One project lead and technical resource guided Convergent through this process as actual implementation began.

From a deployment planning standpoint, Convergent also involved a quality manager, quality director, team supervisor and a member of HR to help with CEScore setup and address agent and supervisor training and support considerations.

## **Implementation Milestones:**

The CEScore Setup process was formally defined and involved the following steps and responsibilities:

1. Define KPIs - Call Center Operations
  - Client - Identify measurable KPI's and weighting factors for scorecard
  - TPO - Provide consultation
2. Define Point values ranges - Call Center Operations
  - CLIENT - Define sweet spot or Lowest Acceptable point 1 range.
  - TPO - Provide consultation. Provide standardized range values based upon the reference line.
  - Populate KPI and SubKPI data tables.
3. Define Data Pulls - IT
  - CLIENT - Identify data sources for desired KPI's. Define desired timing and methodology of transfers.
  - TPO - Provide coordinated transfer protocols
4. Define Calculations - Call Center Operations
  - CLIENT - Identify if customized calculations are required for any KPIs.
  - TPO - Determine customized solution / query
5. Obtain Project/Team/Agent assignments – Supervisors
  - CLIENT - Provide spreadsheet data or electronic files of team/supervisor/project assignments.
  - TPO - Populate data tables with provided data.



6. Obtain User Profiles – IT

- CLIENT - Provide spreadsheet data or electronic files of profile data including all system user IDs.
- TPO - Populate profile tables with provided data.

7. Determine Pilot Team – Center Operations

- CLIENT - Identify Initial roll-out team/center.
- TPO - Activate initial roll-out login profiles. Setup Import interface.

8. Define data transfer/import processes – IT

- CLIENT - Setup FTP/DropBox accounts, directories, file naming conventions, delivery schedules.
- TPO - Coordinate push/pull transfers and file handling

9. Determine Internal Resource and Time Requirement – Management

- CLIENT - Identify internal resource/resources that will be responsible for daily administration. Existing or new hire.
- TPO - Establish relationship

10. Define QC Forms – Quality Control

- CLIENT - Collect all existing or desired QC Forms and provide to TPO
- TPO - Build and populate CEScore QC Forms in data tables

11. Determine ABC Pay Strategy – HR/Mgmt

- CLIENT - Define methodology and pay/bonus structure. Provide agent base pay rate. Define required supporting reports.
- TPO - Customize/Setup pay algorithms to adhere to strategy. Setup required for reporting and file handling.

12. Determine CEScore Training Guideline – CLIENT

- Client Administrator - Train on all aspects of system
- Executives and Managers - Train on dashboard fundamentals and reporting
- Project Managers - Train on dashboard fundamentals, reporting and KPI/SubKPI management
- Supervisors - Train on dashboard fundamentals, reporting, User Profile Setup and team assignments
- Agents - Train on dashboard fundamentals, reporting and QC Form Review
- QC Team - Train on dashboard fundamentals, reporting, QC management and administration.

Each step of the process was managed in a formal project plan in which roles, dependencies and delivery dates were specified. Success was measured based on adherence to the project plan and timely achievement of defined project milestones.



## Implementation Enlightenment:

The CEScore implementation was innovative or, at least, uniquely differentiated based on how comprehensively it required Convergent to consider every aspect of their contact center operation. As a BPO – where contact center operations are core to their business, the CEScore implementation process delivered value on levels they hadn't expected before embarking on their CCPM journey with TouchPoint One – and had never previously encountered implementing other contact center infrastructure solutions or technologies.

Convergent's SWOT analysis helped confirm that they had great people, best-of-breed key technologies and well-considered processes, but CEScore provided a way to integrate all of these assets within a cohesive, state-of-the-art performance management platform. To do so necessitated a healthy review, and updating in some cases, of the essence of what makes their business operate and succeed.

*"Implementing our performance management processes through CEScore – accessible to our entire staff via the Web on any pc, smart phone or tablet – transformed us to a level of effectiveness and scalability that was beyond our initial expectations," explained Kostecka.*

## Roadmap Influence:

TouchPoint One is focused solely on CCPM and thrives on customer feedback, insights and suggestions. As a globally expanding BPO with contact center operations at the heart of their business, Convergent pushes the envelope like few others in terms of the number and variety of projects and programs they need to setup in CEScore. Convergent, therefore, established a strong influence on the CEScore product roadmap and the TouchPoint One team meets with them regularly to review and prioritize enhancements.

*"Convergent has been instrumental in the development and evolution of the Acuity Performance Management Solution," said Greg Salvato, CEO of TouchPoint One. "They are fanatical about increasing operational efficiency, improving customer care, empowering agents and reducing risk and recognize CCPM's foundational role in achieving organization alignment and transforming talent, technology and processes into progressively effective assets. TouchPoint One is committed to Contact Center Performance Management and delivering the solutions that establish competitive differentiation for contact centers among the world's leading organizations and outsourcers."*



## **Meeting Implementation Challenges:**

Acuity implementation requires consideration and input from a more diverse community of personnel than perhaps other types of solutions that are usually department and role specific. The process for Convergent was relatively smooth but coordinating schedules and resources can be a challenge. TouchPoint One is extremely conscious of this and diligent in driving the process and keeping it simple and efficient. Extensive use of online meeting services, conference bridges and on-sight work sessions streamlined the Convergent initiative. Planning guides, agendas, follow-up and project leadership provided by TouchPoint One were instrumental in making the implementation effort smooth and predictable.

## **Astounding ROI:**

Convergent attributes much of its rapid growth, low agent turnover and exceptional client retention rate to the implementation of CEScore. Convergent worked with TouchPoint One specialists to identify, score and weight their key performance indicators. Agents were informed that performance would be measured and displayed on each employee's desktop and that pay would be directly linked to performance. Employees perceived this process as fair and as an opportunity to prove themselves based on objective criteria. Supervisors were able to quickly identify performance issues and address and correct them within minutes versus weeks, or never. Management was able to compare performance at the site, team and agent level nearly instantly at the office or remotely through hand held and other smart devices. Within 12 months of implementing CEScore, Convergent became our client's (the client referred to in the NEEDS section) top ranked vendor and, as a result, was awarded double the business.

Key statistics reflecting improved performance according to specific KPIs is provided below.

- Attendance increased from 84.2% to 87.7%, a 4.2% improvement, resulting in over \$400,000 in additional revenue (2013 vs. 2012).
- Dollars per Contact increased by over 20%, resulting in over \$50,000 additional revenue per month for the client, and increased performance bonus.
- Customer Satisfaction scores, based on post call, live surveys of customers who called that day, increased by 6.8%, resulting in increased performance bonus.
- Attrition reduced by 30%, reducing training expense by over \$350,000 per year. Increased average tenure also improved overall performance contributing to bonus achievement.
- Bonus % increased by 100%, resulting in over \$1,000,000 to the bottom line (EBITDA).



## **Voice of the Agent:**

Among the most rewarding aspects of Convergent's CEScore implementation has been the value it's delivered to agents. CEScore enables agents to be connected to their supervisors as well as the rest of the operation in a way that would not be possible without it. Convergent's entire organization is aligned along a single, comprehensive version of the state of the business. No one is isolated or left behind. No one's performance is measured based on a different set of standards than another's. Agents appreciate the consistent and continuous support that CEScore facilitates and knowing that their employer is genuinely interested in their well-being and committed to their success.

*"We witness both anecdotal and empirical evidence of CEScore's impact on agents every day. Agents regularly express their appreciation for and the value they gain from CEScore and our agent Attrition rates and Attendance scores have improved significantly since deploying CEScore. In addition, wrongful termination incidents have nearly disappeared," stated Kostecka.*

## **Voice of the Customer:**

CEScore has provided Convergent with a deeper comprehension of the correlation between employee satisfaction (ESAT) and customer satisfaction (CSAT). Conceptually, they always understood the relationship between these elements, but CEScore has enabled the relationship to be measured directly. As agent Attrition rates have dropped and Attendance scores have improved significantly since deploying CEScore, Convergent scores for Customer Satisfaction have risen.

## **Business Transformed:**

*"CEScore has literally transformed our business," said Kostecka. "It transforms high quality personnel into progressively higher quality personnel. It increases the span of control for supervisors maximizing their output, effectiveness and efficiency. It aligns our entire team and provides insights and control that without CEScore would not be possible. It's allowed us to maximize investments in other contact center technologies by providing a consolidated storehouse for all performance related data and central command center to generate and act on intelligence."*

*"The demonstrated ROI has been astounding. In fact, we'd be hard pressed to operate today without CEScore. In 2012 alone, it delivered >\$1 million in bonus revenue from a single client that we did not earn before implementing CEScore. We saved >\$350k in training expense due to decrease in agent attrition. Improved attendance delivered another \$450k in additional revenue."*



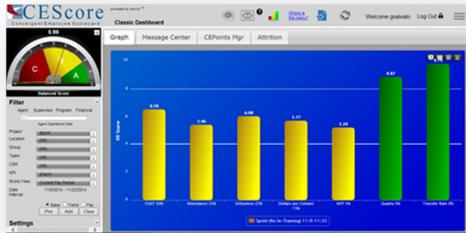
## **Culture Transformed:**

CEScore CCPM has become the foundation on which all members of the Convergent team measure and manage our contact center operations. With CEScore, Convergent has a single system accessible to anyone in the organization that reflects a consistent, true and impartial view of performance as well as communication tools that facilitate highly responsive and fluid interaction between team members to address weaknesses or celebrate success.

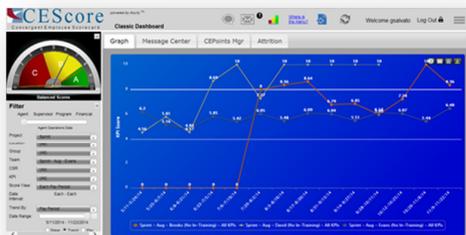
CEScore has become endemic to the Convergent culture and operational philosophy. Agents appreciate CEScore and rely on it to help them maximize their opportunity with the organization. It equips them with a clear and detailed analysis of their current, historical and relative performance and how that impacts not only their own compensation and careers, but their team's and the business overall.

CEScore provides seamless access to coaching, training or other levels of support whenever needed. Through CEScore, agents gain control over their own professional and personal destinies and know that their employer recognizes them as integral to the success of the organization and that they are seriously committed to their prosperity.

*"For Convergent, CEScore value has proved to be in a league of its own and almost impossible to fully quantify based on conventional ROI metrics alone," said Kostecka. "We've evaluated and invested in the gamut of contact center infrastructure solutions such as ACD, omni-channel traffic queuing, call recording, speech analytics and others which in many cases are must-have technologies that drive operational efficiencies and help us comply with evolving regulatory guidelines. But without CEScore CCPM, it's not possible to realize the full value or return afforded by such technologies or our people and processes."*



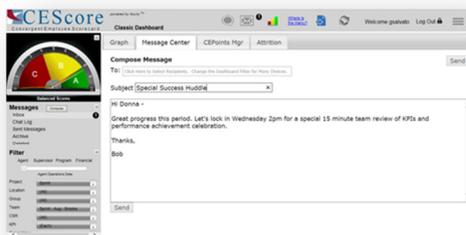
Working with TouchPoint One, Convergent was able to customize CEScore to drive the performance measured and rewarded by their global communications client, and drive internal metrics critical to their profitability. In one, easy-to-use system, CEScore sets, measures and reports key performance indicators customized for Convergent's largest client. The system was installed on every desktop, from frontline agent to the company's CEO.



CEScore displays current performance against targets in a color-coded dashboard. Everyone in the organization is able to see their performance results, at the individual, team, site and enterprise level, every day. In addition, Convergent used CEScore's "ABC Pay" module to pay agents, supervisors and managers based on their performance against targets.



TouchPoint One understood the challenge Convergent faced and implemented the perfect software solution, in a very short timeframe. This changed the way Convergent managed performance. A performance problem that seemed too complex to solve became relatively simple to manage, thanks to the CEScore system. The CEScore system was installed on every desktop giving each employee a clear target. Results against the targets were displayed each day, and as applicable, in real-time.



CEScore's balanced scorecard functionality ensured that staff was focused on doing the right things, and doing them well. Agents and supervisors are now able to see all of their key metrics on one dashboard, at the same time, including; attendance, utilization, customer satisfaction scores, dollars collected, quality assurance scores, transfer rates, first call resolution percentage and attrition. Finally, each pay period, agents and supervisors earn an overall "balanced score" based on the rolled up, weighted KPI scores, and their pay rate varies based on that score.

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