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▶ **Time Tracking in the Contact Center**



Time Tracking

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Time Tracking in the Contact Center

Command and control is, perhaps, the most fundamental set of processes in the contact center. Knowing what is going on, both in real time and historically, is just plain old “good management.” With companies struggling to gauge the productivity levels of customer service representatives (CSRs) and as long as contact centers have been a critical part of business, one would think the technologies and processes to record agent activity would be firmly understood and consistently applied. BUT they are not! Inconsistencies in time accounting make a mockery of benchmarking studies because no two operations record activity the same way.

A manager will always have difficulty justifying and obtaining the resources s/he needs without an accurate, mathematical description of the work that goes on in the contact center. When budget time comes around, senior management take their calculator and multiply talk time by the number of calls and declare THAT is the staffing requirement! It is incredibly tough to explain why the center needs as much as double that number without firm justification.

So, what are the underlying principles of time accounting in the contact center? What needs recording and how should it be measured? What tools does the automated call distribution (ACD) and contact management software have to help and how should they be used?

Underlying Time Accounting Principles

At its most basic description, CSRs are paid to do three things: (and this will be on the test!):

- 1) Wait for a call – available or ready time
- 2) Talk to the customer on the call – talk time
- 3) Wrap up from a call – wrap or after call work time

All ACDs have specifically designated buttons on the telephone that are used to track CSR

time. At minimum, there are login/logout buttons, “Available” or “Ready” buttons, and “Not Available” buttons. Most ACDs split the “Not Available” button into two buttons: one for after call work (ACW) and the other for Auxiliary (Aux) work. Beyond these basic configurations, different ACD manufacturers diverge on the buttons available for time accounting.

Agent workstate button usage, then, should facilitate the accurate measurement of these activities and document those other activities that take time away from them. With this definition in place, time can be grouped into two broad categories:

- Total availability – ready + talk + wrap
- Shrinkage – all other time

The only two measures that can be consistently relied upon are: ready (or available) and talk time. Almost all ACDs use similar means to define and measure these. From this point on, technology and business practices diverge, starting with login/logout practices.

CSRs should be logged in while being paid

Login/Logout Practices

The time accounting problem starts right off with inconsistent procedures on logging into and out of the ACD. Many centers have CSRs use the Aux workstate during lunch hours. This action immediately impacts benchmarking studies because a 45-

minute lunch period represents 8.6 percent of the workday. By comparing a center that logs out for lunch to one that uses Aux time, results are already skewed by almost 10 percent.

Guidelines for how to handle the lunch period can be found by reviewing why time is measured in the first place. And that is to understand and describe PAID FOR time. Generally, lunch is not paid time. Therefore, it is logical and recommended that CSRs log out

for lunch. The most common argument against this is when a CSR logs out, they are not visible on the real time reports. While true, schedule adherence can be better managed with the login/logout reports available on most ACD reporting packages. A login/logout report presents the CSR with hard documentation of adherence violations not available with any other workstate button.

Time Accounting Rule #1

CSRs should be logged in while being paid -- this means logging out for lunch as well as when they leave for the day.

Login time is also impacted by training. Training is defined as “shrinkage”. To accurately measure and describe this time, an agent should login and go into Aux. Offsite training is handled in a fashion similar to sick, vacation, jury duty.

After Call Work

The after call work button is the most misunderstood of all workstates. In fact, some ACDs do not even have such a workstate button. Staff planning is a classical industrial engineering challenge; how many calls (call volume) and how long do they take (average handle time, or AHT.) If call lengths are not correctly measured, true staffing needs will be misrepresented. How long each call takes on average includes that time spent wrapping up after a call. Most workforce management packages use this definition of talk time plus wrap up time in their calculation of staff requirements. Misusing the ACW workstate button can have grave implications on staffing estimates.

Time Accounting Rule #2

After call work should only be used for work after a call directly related to that call.

With this definition of ACW, average handle time then becomes a measure of the minimum amount of time involved in handling each call.

A common after call work mistake is to

discourage CSRs from using ACW at all. This is sometimes justified by having CSRs keep callers on the line while doing this work. First, this practice runs up toll free expenses, and it is not necessarily good customer service to keep callers on the phone needlessly. Second, it forces CSRs with legitimate after call work to use the Aux button. This then lumps legitimate “total availability” time into shrinkage time and will result in understating the true staffing requirements.

It is critical to understand how ACW is calculated on your ACD. One leading ACD manufacturer calculates after call work by dividing total time spent in wrap up, not by the number of calls, but by the number of times the ACW button was pressed. Thus, if a CSR only goes into wrap up fifty percent of the time, their ACW will be overstated by double! In this scenario, not only is ACW not comparable to other centers, it is not possible to compare ACW across CSRs in the same center as each agent will need to use ACW differently as their skills vary. Most users of this brand of ACD “forces” CSRs into ACW for a few seconds after each call so the average is based on all calls rather than button usage.

What about time spent wrapping up from a call that was delayed to a slow period? This time should be accounted for in Aux work since it does not figure into the “minimum” time definition of AHT. This work is optimally captured in a coded aux workstate (discussed later.)

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Shrinkage

It is amazing how much work it takes to run a contact center. Figure 1 gives a sample breakout of a typical contact center’s shrinkage metric.

Time Accounting Rule #3:

Track “shrinkage” time to as much detail as possible

Figure 1
Shrinkage Metric Breakout

Sick 5 days	1.9%
Vacation 10 days	3.8%
Breaks 30 min/day	6.3%
Training 40 hrs/year	1.9%
Team meetings 30min/week	1.3%
Project work 30 min/day	6.3%
True unproductive 30 min/day	6.3%
Total Shrinkage	27.8%

Typically, approximately 30 percent of paid for time is “unavailable” to do those three things CSRs are paid to do. Notice this is not referred to as “unproductive” time. Much of this work is very productive. Calling it unproductive also invites unnecessary senior management attention. But, it is this shrinkage metric that needs full and accurate description. Coded aux state and workforce management packages can help this effort.

Coded Aux Workstate

Most ACDs have, at least in their advanced packages, a coded AUX workstate feature. This allows a CSR to tell the ACD what they are doing while in the AUX workstate. Typically, a two-digit code entered after pressing the AUX button. The most commonly used AUX codes are:

- Common AUX Workstate
1. Break
 2. Project Work
 3. Delayed Wrap
 4. Training
 5. Team Meeting
 6. Other

It is important to keep the number of options down to at least the single digits -- and five or six is better. Otherwise, too many states will

confuse CSRs, and AUX reporting will lose validity. The ACD reporting can then break down AUX workstate into manageable parts. “If you can’t measure it you can’t manage it.”

Workforce Management Tools

Workforce management packages perform several functions in the contact center:

- Metric forecasting, particularly call volume
- Staffing and scheduling
- Shrinkage management

It is the shrinkage management capability that can be used to manage time in a more refined manner.

A workforce management (WFM) package is most effective in large centers where a control desk manages the day-to-day activities of the center. In this environment a supervisor can manually enter shrinkage activity into the WFM system. Normally this is not a real time activity, although CTI integration between the ACD and WFM package can automate this. In the manual mode, however, the CSR immediately reports significant schedule variations to the control desk and tracks minor variations and turns them in at the end of the day. The WFM package provides a ready repository to track shrinkage time and the system automatically incorporates this into staffing calculations.

More than one manager has lost their job because they could not satisfactorily defend their staffing levels.

The manager of a contact center needs to be intimate with shrinkage metrics. They need to be able to defend it and have plans to manage it. More than one manager has lost their job because they could not satisfactorily defend their staffing levels.

Mute vs. Hold

ACD reporting collects time into a variety of timekeeping categories.

An agent time report will usually track time into the following categories:

- Available
- ACD IN (the official talk time used in the AHT calculation)
- ACW
- Aux Work (and detail if coded aux is used)
- Extension calls (non-ACD calls)
 - o EXTN IN – calls that do not go through the normal ACD routing
 - o EXTN OUT – queuing process. These are normally direct calls into and out of a CSR's telephone
- Hold Time

These almost never add up to 100 percent of a CSR's total login time. One way to improve this is to ask CSRs to use mute instead of hold when asking callers to wait. Time accumulated while a CSR is in hold can also be accumulated in whatever workstate the CSR is in while on the call --so time is double counted. When the CSR is in hold, not only is time double counted, time accumulated into the hold category is a mixture of hold time while on ACD calls, outbound calls and direct station calls. By asking CSRs to simply mute the call rather than put the caller on hold, time is only accumulated in one category. This helps minimize confusion when using Agent Time Reports for performance management purposes.

Time Accounting Rule #4:

Use the hold button sparingly to minimize the double counting of time. Use the mute button when asking callers to wait.

CRM and Time Accounting

The advent of customer relationship management (CRM) packages have introduced new demands on time accounting. The most pressing of CRM capabilities is the multi-channel contact center. Leading edge

operations now have CSRs handling inbound, outbound, e-mail, fax and Web chat. There is a wide range of implementation options from "Automatic Contact Distribution," where CSRs are handling interactions from all channels on a real time basis to completely separate units dedicated to certain channels. The most common time keeping practice for integrated channel contact center operations is to set up coded Aux workstates for each channel handled in the center. This requires no integration between the CRM and ACD systems. Using a coded Aux workstate keeps calls away from the CSR while handling alternate channels, but requires

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management discipline to ensure time sensitive telephone calls continue to be answered quickly. On the other hand, some sophisticated CRM packages specifically designed for the contact center may have moved the time accounting function completely off the ACD and onto the CRM package itself. This is part of a longer term trend of moving switch intelligence away from the ACD and onto a multi channel contact server.

Time Accounting Rule #5

Track time servicing alternate channels in just as much detail as the phone channel.

This may require the purchase of a cross platform reporting tool. Multi-channel contact centers are still in their infancy and there are no standard mechanisms to track time spent in non-phone customer interaction activity. It may be necessary to use a combination of ACD data on coded workstate with alternate channel system software reporting tools to get a good gauge of average handle times for e-mail, chat, and other interaction channels. The advent of the multi-channel contact center has spawned a whole new market for reporting tools that can report across system platforms to provide integrated metrics.

The Future of Time Accounting in the Contact Center

Two trends are going to push how time is accounted for in the contact center.

First, CRM packages will continue to expand their contact center focus and capability. CTF's true value will be realized when the CRM vendors fully integrate ACD functionality into their systems. This is beginning to happen as CRM vendors start offering a soft phone (screen based telephony) capability. These CRM systems know the status of each individual CSR and the vision of host-based routing, down to the individual CSR based on past customer interactions, can be realized.

Second, the inevitable movement from "big iron" proprietary, based ACDs to open IP systems, will encourage this. IP switch vendors will look to CRM vendors to build the ACD intelligence function into their systems. CRM vendors will welcome the opportunity to control the interaction and ACDs will become "Automatic Contact Distributors" rather than "Automatic Call Distributors."

In this future environment, all time accounting will be in the CRM package. The contact center analyst's job will necessarily change to one requiring database reporting skills. The definition of "total availability" will change to include time responding to e-mails and chat sessions. Workforce management software will have to schedule time for all interaction channels and account for those that require real time servicing and schedule non time-sensitive channels in a manner that still ensures timely response.

Conclusion


Time accounting in the contact center industry has not been standardized. Understanding that the underlying reason for time accounting is to describe "paid for" activity helps establish rational procedures. Describing "paid for" activity is vital to justifying adequate staffing levels in the contact center. The shift to multi-channel


contact centers, the changing CRM marketplace, and the changing technological landscape will change time accounting's tools and platforms. However, the basic underlying principles and rules will remain the same.

CRM packages will continue to expand their contact center focus and capability.

The inevitable movement from "big iron" proprietary, based ACDs to open IP systems, will encourage this.

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Low Risk

One of the surest ways for a contact center to achieve improvements in both service quality and cost performance is to take advantage of economies of scale. To gain these efficiencies, fewer, larger agent groups are often better than having many small agent groups; operating larger centers is often better than operating many small centers.

What would you do differently if you knew you had a valuable customer on the line?

Operationalizing customer intelligence is a key factor in migrating the customer contact center from a cost/service oriented operation to a profit/loyalty oriented operation. Customer service managers should be able to discuss customer defection saves, service to sales conversions, cross & up sell ratios, and what the center is doing to increase customer satisfaction and loyalty with senior management.

About the Author

Ike Mitchell is a Principal Consultant at CSC an a Contact Center specialist with in-depth knowledge of process re-engineering, customer service and technology. He has focused on both the technical and human sides of contact center management. His experience includes assessing and avoiding business risks, planning technology assets, and managing large projects. Mr. Mitchell has extensive industry experience and has provided consulting services in over 100 contact centers covering multiple applications, sizes, technologies and industries.

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