# Get the highest return from reports

To BI or not to BI.

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# Introduction

When executives and managers ask for reports, it basically means they need new insight to

- increase revenues,
- reduce cost,
- improve customer experience,
- enhance employee experience.

Information is essential to their decision-making process. For that reason contact centers have some form of report-making process in place, perhaps one or a combination of the following :

- a built-in module from the phone system,
- several Excel mega-spreadsheets,
- a series of reports from Crystal Reports,
- an in-house team of developers,
- a full-blown business intelligence suite.

Significant dollars are spent on getting reports delivered to leaders and front-line employees. Occasionally, these costs have driven call centers to forego the expense and work with what basic information is available and accepting the limited results they achieve.

Today's technologies should significantly reduce these costs and help call centers achieve even more impressive results. Sadly, that is not always the case.

This paper examines the challenges of accessing (or not) business insight to the contact center decision-makers and the people who benefit from using it. We'll look at what is lacking from the current array of solutions including BI technologies. We'll also discuss what contact center managers actually expect from a cost-effective solution. Finally, we'll introduce an evolutionary software solution that brings vital business insight to the people who need it ~ when, where and how they need it.

**Performance management expands**

- By queues, skills, applications…
- By business unit, regions, districts…
- By departments, markets, segments…
- By managers, team leaders, agents..
- By agent demographics…

# The Challenges

### The Marketplace

Today's competitive world unleashes overwhelming threats on a regular basis. Technological advancements surfacing every day put every business to the test.

Contact centers are especially vulnerable to the marketplace pressures. They strive to build a relationship with each and every one of their customers with merely the sound of a voice, the words of an email or the text of a chat - a formidable task indeed.

When the frantic pace of yesterday is not enough to sustain your success of tomorrow, the pressure can be overwhelming. Born out of this necessity is the thirst for new information and new insight to discover innovative ways to deliver value to their customers.

### Challenge # 1: Information Overload

There is rarely a shortage of raw data, yet leaders continue to run short on business insight.

The challenge is not a lack of data per se, it is the transformation of data into insight that is absent. Without business insight, data can lead to "information overload".

### Challenge # 2: Multiple Data Sources

Not only do contact centers have large quantities of data, they have numerous sources of data in different places.

The difficulties of transforming data into insight are magnified when you have multiple data sources. Users find it time-consuming to reconcile the many reports they must comb through to get answers.

### Challenge # 3: The High Costs of BI

Some contact centers recognize the potential value and risks in investing in a business intelligence solution.

Although no one can deny the power of business intelligence solutions to deliver on their promise, the costs are rarely easily justified. Even today, companies are still not rushing to deploy such an enormous venture. Why? Perhaps it's because the majority of business intelligence (BI) implementations don't deliver the anticipated results. BI projects fail at an alarming rate – between 70 and 80 percent, Gartner[1].

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[1] Goodwin, Bill. "Poor Communication to Blame for Business Intelligence Failure, Says Gartner," Computer Weekly.com, January 2011.

### Challenge # 4: Dependence on Professional Developers
Some contact centers revert to hiring a team of professional developers to create reports.

In addition to being expensive, this creates a dependence that grows to unhealthy proportions. Who has not been frustrated when needing a new report, or simply requiring a small modification to an existing report?
Many companies put cost controls in place. These processes will usually require a business case to be submitted and force a series of endless meetings with every important member of the affected teams. The cost of asking for a report, let alone getting it developed, is enough to give up altogether. And we're not mentioning the delays which will eventually affect your reaction time when facing strategic decisions.

### Challenge # 5: Dependence on Excel Gurus
Some contact centers build a team of spreadsheet experts.

Many companies rely solely on the most widely used BI tool, the Excel spreadsheet. While Excel offers many useful features such as graphs, charts, and pivot tables which assist in decision-making, it doesn't scale to your business. Also, compiling data from multiple databases is time-consuming, labor intensive and is prone to errors.

### Challenge # 6: Collecting vs. Analyzing
Many companies unwillingly end up spending more time collecting data, compiling and distributing reports than they spend in quality analysis.

This inevitably leads to delays in reaching the right decisions, weakening rather than strengthening their position in their market. Timely decisions are key to delivering value to customers.

### Challenge # 7: Shelf Life of Existing Reports
The pace is rapid. Change is inescapable. How a company adapts to change is vital to its success.

When reports are obsolete decision-making takes a huge hit. The cost of revamping, refitting and reformatting reports to accommodate changes is rapidly mounting. The "growth" rate is alarming. Companies are caught in a money pit. "Damned if you do, and damned if you don't."

### Challenge # 8: Slow and Limited Access to Information
Information is so hard to come by and many fail in establishing a proper distribution channel.

Reports repositories are cumbersome. Distribution methods are costly. People have difficulties finding what they need. All of which limits access to the information to a few experts and to a limited audience often times "too little too late".

### Challenge # 9: Lack of Empowerment

The responsibility of discovering insight is quite often left to "business analysts" perhaps largely due to the complexity of the available information systems.

Under such competitive times, wouldn't it make sense to have all hands on deck? Many front-line managers end up feeling frustrated as they are cut-off from the discovery stage of the decision-making process. A lack of empowered leaders impedes success.

### Challenge # 10: The Human Experience

When information is not easily available and when it is insufficient in depth, team leaders spend more time behind their desks than with their agents.

In a world where customers can connect with us through so many channels, it is a shame to find front-line employees receiving less one-on-one quality time with their supervisors because the latter are trapped behind a desk trying to figure out what to coach on.

Front-line employees often reflect their work "culture" when in contact with their customers. Too often the human interaction is overlooked as people are consumed with the task of gathering insight. Your customers inevitably feel the final blow of the limited support your agents receive.

## Where do we go from here?

So far we've established that you have no shortage of raw data, yet you have a constant craving for fresh new insight that you can access freely, rapidly and easily.

You value empowered people, people with initiative, people committed and engaged towards success. You believe the more they know about their business the more they can help.

We've established why you need insight and empowered people who know how to use it: to generate more revenue and reduce costs.

We also know this: you don't want to spend the said generated revenue or the said savings in order get the said insight. Who would?

## What would your ideal solution look like?

If you could design your ideal solution to help you achieve your goals and to remove your pains, what would it look like? Perhaps you've never thought about it concluding that it's a pipe dream, or it's too expensive. Take a few minutes to think about it, and read on.

Companies that empower[2]

- Encourage their employees to take initiative.
- Engage them to think differently
- Establish trust and clarity
- Deploy strong workplace policies
- Create an inclusive environment
- Let employees shine
- Master people-centric balance

[2] http://smartblogs.com/leadership/2013/06/07/9-ways-to-empower-employees-to-be-leaders/

Based on over twenty years of experience, here's what other contact center executives, managers, team leaders and agents are saying:

"I need cost effective, fast, accurate access to information I can use, not just stats!"

"I sure could use a 'one-pager' report that includes my telephony results along with my sales and quality management results…"

"We have very competent people busy compiling reports. We need them spending that time leveraging their analytical skills."

"I want my teams to be dancing to the beat of the same drummer, that is, I want my teams working from the same "truth" ~ Integrity is crucial."

"I need to understand why my agents' productivity and quality is where it's at."

"I want to create transparency within my organization. Information and insight has to be readily available throughout my management teams."

"I wish I could see my performance results of yesterday compared to my results of last week, and month-to-date."

"We need to be able to access our reports anywhere, anytime. We need that kind of freedom and that level of flexibility."

"If our business world changes, or if our company changes, or even if the department changes, we need our reports to adapt instantly. The change has to occur simultaneously and at no additional cost."

"I need the ability to easily navigate and drill down to deepen and narrow the scope of my analysis."

"The cost of acquiring knowledge I already possess is already too high.  I need to reduce my cost and acquire knowledge I don't already know!"

"Better decisions. I need my front line managers to make better decisions. I need them to manage the business not reports."

"I need my people to have their own personal list of custom reports that they can easily access with a couple of clicks. They have to become self-sufficient decision-makers."

"I need simple and intuitive navigation. Perhaps some charts too because I'm more a visual person."

"I want to reduce the delays to identify problems and to fix them. That means quick answers to my questions which lead to quicker resolution of problems."

"I want my new report solution to save me time when I am looking for answers, to provide insight not just data. I need insight that helps me reduce my costs, ideas to increase revenues and make my employees and my customers happier doing business with me. And did I mention I want this solution to be affordable?"

It seems clear that contact centers, however diverse, share similar ideas on what they need to improve their business management teams' efficacy when it comes to better decision making.

Somewhat predictably, the need for improved decision-making headed the list of benefits sought from BI, with 92% of respondent organizations rating this objective as "critical" or "very important". Particularly, "better decision-making" was considered the most "critical" objective by a significant margin, with 59% of organizations rating it as such.

The key to greater value in business intelligence is to use analytics to discover insights and information that the organization didn't know.

**Business Intelligence Objectives**
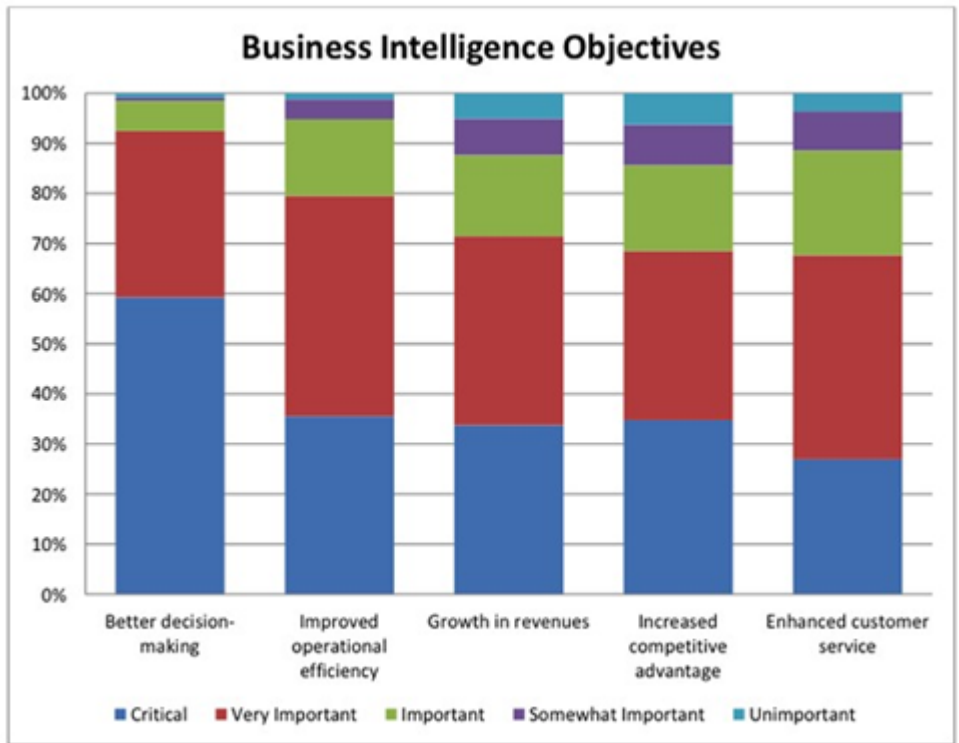
*Dresner Advisory Services' (DAS) flagship Wisdom of Crowds Business Intelligence Market Study

The Aberdeen research concludes that to achieve 'Best-in-Class' performance, call centers must "implement a dedicated operational business intelligence platform" which will support:

➤ Faster decisions
➤ More accurate decisions
➤ Better business insight and identification of trends for strategic planning
➤ Faster dissemination of actionable information to key operational decision-makers

*Research report by the Aberdeen Group – unlocking Business Intelligence.*

We can summarize the list of expectations as follows:

- applications or data sources.
- ➤ Integrate data from multiple
- ➤ Deliver meaningful analysis and reporting quickly and efficiently.
- ➤ Increase volume of users needing access.
- ➤ Available anywhere, anytime.
- ➤ Have a solution with the scalability and flexibility to grow and change as your organization does.
- ➤ Reliable, secure and dependable.
- ➤ Gain insights to understand and analyze your business performance and opportunities on a deeper level.

## Introducing The Reporting Engine®

Frequently users have thousands of reports, and information items available in a repository. But neither analysts nor IT developers can customize that content to the specific needs of each individual.

To fulfill these unique requirements, users must be given the freedom to manage their own content. They must be able to replace old, outdated information with new or more relevant data.

Let us introduce you to a new kind of business intelligence solution specifically designed for the business of running a contact center. A solution that is fast to implement ~ within weeks.

Instead of full blown business intelligence where many resources remain tied up and significant expenses are required, make way for a new generation of context-specific BI for contact centers.

The Reporting Engine® will free up IT and business analysts the endless cycle of report generation and customization giving contact center managers the freedom and the flexibility to quench their own thirst for knowledge.

Imagine…
Your business users access their own personalized list of custom reports; navigate through any time period; drill down to any department, skill, team, agent and custom demographic; and refine their choice of key performance indicators. All within a no-training-required interface.

Imagine…
All of your data sources stored in a database specifically tailored to your contact center with your data aggregated into structures that permit sophisticated analysis.

See what your Service Level was yesterday for your San Diego center, and your New York center. Then discover how they compared to last week's performance, and how they are doing month-to-date and year-to-date. While you are at it, why not check up on the sales results of your agents, and what the closing ratio was in relation to their quality indicator. All of this in less time than it took you to read this paragraph.

Compare last week's results of your senior level agents against the intermediate level; while you are at it, how about looking at the 12-week trend? You know that schedule adherence is a critical success factor so why not include that in here; then let's see what particular skill set performs best. All of this in less than 15 seconds.

There are many BI solutions in the market, but rarely will you find a solution that is designed to specifically optimize contact centers. The Reporting Engine® is the culmination of over 20 years of contact center experience. When a company's cost of running a contact center approaches 60 to 70 percent of their budget, expectations usually run high when it comes to finding ways to reduce costs. That is why The Reporting Engine® was created.

It provides personalized custom reports including visually appealing charts.
Because helping contact centers reduce their operating cost was our prime objective, our mission was to re-invent BI. We saw a need for a solution that would

- leverage BI technologies,
- be fast and easy to implement
- free up resources
- be a reasonable investment with a tangible ROI

Ultimately The Reporting Engine® guarantees to deliver fresh new insight to as many users who need it. New business insight that will

- reduce cost,
- increase revenues,
- improve customer experience,

## The Reporting Engine®

- Automatic software updates – FREE!
- Work from anywhere
- No Contract
- No Obligations
- Pay as you go
- Scalable
- Personalized, custom reports
- Cool jazzy charts
- Access multiple data sources
- Innovative
- Better data, better decisions

> ▶ enhance employee experience.

The solution delivers layers of tangible benefits:

- ▶ **Save on the activity of acquiring information:**
  - ▶ Save money on the creation of reports
  - ▶ Save money on the running of reports
  - ▶ Save money on the analytical work

- ▶ **Save on the activity of making decisions:**
  - ▶ Save time in identifying problems
  - ▶ Save time in solving problems
  - ▶ Increase opportunities with quicker turnarounds

- ▶ **Improve employee morale:**
  - ▶ Free up team leaders allowing them more contact with agents
  - ▶ Better information leads to better coaching approach
  - ▶ Reduce turnover = reduce hiring costs

- ▶ **Enhance customer experience:**
  - ▶ Empowered agents deliver superior service
  - ▶ Discover new areas of improvement more quickly
  - ▶ Better decisions, quicker turnaround, faster resolutions

No need to implement a corporate wide full-blown BI solution to improve decision-making within your contact center. Our product is a simplified on-demand BI solution specifically designed to deliver new insight to the contact center management teams, with a fast roll out at a truly affordable cost.

[3]http://blog.marketculture.com/2012/10/02/7-ways-to-boost-your-customer-focused-culture/

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### 7 Ways to Boost Your Customer Focused Culture[3]

- ▶ Get everyone involved
- ▶ Benchmark your current level of customer focus
- ▶ Make it real
- ▶ Put customers on the agenda
- ▶ Hire people with a customer focused mindset
- ▶ Help people connect their work with their customers
- ▶ Recognize customer focused behavior

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# Return on your investment

Let's take a hypothetical contact center with 1000 agents earning $15/hr (incl. 30% overhead) working at an average handling time of 300 seconds per call. The Reporting Engine® can help managers achieve a productivity gain anywhere between 1 to 5 percent.

Furthermore, let's assume there are at least 3 business analysts developing, running and distributing reports as a full time job. We assume an average salary of $30/hr (plus 30% overhead).

| # of Agents | Payroll/Benefits/Capital | Avg Handling Time (sec) | Productivity Gain (%) | Productivity Gain (sec) | Yearly Cost Reduction | Monthly Cost Reduction |
|---|---|---|---|---|---|---|
| 1000 | $ 35M | 300 | 1 | 3 | $ 350,000 | $ 30,000 |

| # Business Analysts | Payroll/Benefits/Capital | | Productivity Gain (%) | | Yearly Cost Reduction | Monthly Cost Reduction |
|---|---|---|---|---|---|---|
| 3 | $ 165,000 | | 100 | | $ 165,000 | $ 13,500 |

The Reporting Engine® is a Software-as-a-Service (SaaS). You pay a monthly subscription fee. No contract. No obligations. Pay as long as you need it.

Let's take a look at a smaller contact center. This one has 250 agents. They have 1 business analyst spending only 10 hours per week on creating, running and distributing reports:

| # of Agents | Payroll/Benefits/Capital | Avg Handling Time (sec) | Productivity Gain (%) | Productivity Gain (sec) | Yearly Cost Reduction | Monthly Cost Reduction |
|---|---|---|---|---|---|---|
| 250 | $ 9M | 300 | 1 | 3 | $ 90,000 | $ 7,500 |

| # Business Analysts | Payroll/Benefits/Capital | | Productivity Gain (%) | | Yearly Cost Reduction | Monthly Cost Reduction |
|---|---|---|---|---|---|---|
| 1 | $ 13,750 | | 100 | | $ 13,750 | $ 1,145 |

The agent productivity gains alone justify the expense. Even if the increase in Agent productivity was a mere 1 second per call, this would yield a gain of $30,000 per year, or $2,500 per month.

This is just one aspect of the potential savings. Any potential increase in revenue must also be factored in along with several other intangible benefits.

You can see that an exciting return on your investment is a reality.

## 10 Benefits of Cloud Computing

- Lower risk with subscription based cost
- Reduce spending on technology infrastructure
- Automatic software updates
- Reduce capital costs
- Work from anywhere
- Adoption is quick and simple
- Less personnel training is needed
- Scalability and Speed
- Improve flexibility
- Convenience

Before we conclude our white paper, we would like to show you one of the reasons we feel extremely confident about the success we will help you achieve.

This feature is unique to The Reporting Engine®. It's a built-in capability to aggregate data into structures based on demographics you define for your agents and your queues.

This feature lets you define **demographics** that are specific to your environment. Demographics such as the years of service, education level, training group, schedule type, experience level, level of expertise, any classification you see fit for your contact center. You can also create demographics for your queues: create business units, regional units, districts, segments and markets to name a few.

Then you can extract insight from any of these demographics.
See your contact center in ways you have never been able to see before.

That's the value of The Reporting Engine® – we guarantee to bring fresh new insight.
A key to discovering new ideas to optimize your contact center.

## Conclusion

Contact centers have struggled for many years to find ways to unravel the many hidden gems within their organization. Needless to say, countless still face the challenge of balancing people, service and profit.

The advancements in business intelligence offered hope but at a significant cost ~ financial and human resources ~ that quickly turned hope into disillusionment.

Finally, a company built by contact center experts who understand the realities of contact centers and the benefits of business intelligence.

We heard what contact center leaders have been saying for years:
"*We need access to new insight, to make better decisions, to take our company to new heights. We need centralized data. We need a no-training-required self-serve user interface where I can quickly access my personalized list of custom reports, where I can navigate through any time period, drill down to any demographic, and refine my choices of key performance indicators. We need an affordable, quick to roll out solution that will help us be more profitable.*"

Well, here it is. Come test drive The Reporting Engine® and see for yourself.

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