



# **GLOSSARY OF TERMS FOR CONTACT CENTERS**

**To be used in conjunction with Contact  
Center Benchmarking Questionnaire**

**Also used as a reference and resource for  
ROI Analyses and Onsite Assessments of  
performance, including process findings  
and recommendations.**

**[www.BenchmarkPortal.com](http://www.BenchmarkPortal.com)**

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**Note:** The time periods for which you should report metrics are usually the most recent 12 months for which you have data, except for satisfaction data, which are for the most recent 90-day period. New centers and centers which have recently moved or undergone major changes in technology or organization should discuss the appropriate time period to use with their BenchmarkPortal expert.

## **A**

**Abandon Rate %:** This is the percentage of calls that get connected to the ACD, but get disconnected by the caller before reaching an agent, or before completing a process within the IVR. The percentage abandon rate is the number of calls that are abandoned (agent's calls plus IVR's calls) compared to calls received or offered (expressed in percentage).

*$$((\text{Calls Received or Offered}) - (\text{Calls Handled by the Agents} + \text{Calls Handled within the IVR})) / (\text{Calls Received or Offered}) \text{ expressed as a percent.}$$*

**ACD:** See Automatic Call Distributor.

**Adherence to Schedule:** A measure of whether agents are “on the job” as scheduled. This percentage represents how closely an agent adheres to his/her detailed work schedule as provided by the workforce management system. 100% adherence means that the agent was exactly where they were supposed to be at the time projected in their schedule. The scheduled time allows for meetings with the supervisor, education, plus answering customer phone calls. Percent Adherence to Schedule is tracked and reported by the workforce management system (WMS).

**After Call Work Time:** Call-related work that is done when an agent is not on a call. This is the cumulative amount of time agents spend on performing follow-up work after the agent has disconnected from the caller, divided by the total number of calls handled by agents. The data for after call work time is provided in reports generated by the Automated Call Distributor (ACD) call handling system.

**Agent:** A general term for someone who handles telephone calls in a call center. Other common names for the same job include, but are not limited to: operator, associate, sales associate, collections specialist, customer service representative (CSR), or customer care representative.

**Agent Development:** A process designed to address the agent's individual needs, and to help them build their work skills and achieve their career objectives. This may include, but not be limited to, work behaviors expected, taught, measured and tracked; continuous education offered and encouraged; and career planning.

**Agent Occupancy:** Please see Occupancy.

**Agent / Supervisor Ratio:** This is the average number of agents that a supervisor manages. It is calculated by dividing the total number of agents by the total number of supervisors that manage those agents.

**Agent Turnover:** The number of agents who left their “agent job” (voluntarily or involuntarily) during the previous 12-month period, divided by the total number of agents working, expressed as a percentage. Track those who were hired during the period, minus those who left their job during the same period. The average number of agents working is calculated by taking the

beginning-of-the-year agent head count plus the end-of-year agent head-count and dividing that number by two. Do not include attrition during training, contractors, agents from a staffing agency, or “seasonal agents”. Include only your employees (either full time or part time).

$$\text{Annual Turnover } (\%) = \left( \frac{P}{(B + E) / 2} \right) * 100$$

**Where:**

*P* = the total number of agents that left during the specified period;

*B* = the number of agents at the beginning of the specified period; and

*E* = the number of agents at the end of the period.

**Agent Utilization Rate (Utilization):** Utilization is the percentage of the agents' shift engaged in productive work in other words: how busy are your agents handling customer's interactions e.g. inbound calls, email, etc. Productive time includes customer support work in any channel, research work associated with contact work in any channel, and follow-up work such as after contact documentation work for any channel divided by the total available and logged in hours (Occupancy hours) at work.

Utilization does not include training time, coaching feedback, breaks & lunches, unexcused absences, other auxiliary time, and out-of-adherence time as these tasks are not helping customers.

One major difference between occupancy and utilization in call centers is that Utilization only considers the time agents are active or busy (working helping customers), while Occupancy considers the total hours they are available to help customers.

The formula for calculating Utilization is:

$$\frac{\text{Total Productive hours}}{\text{Total available and logged in hours}} = \text{Utilization \%}$$

Example: an agent takes 50 call in one day, each average 5 minutes handling time and got paid 8 hrs (but had 3 hrs training or not helping customers) then:

50 calls times 5 minutes per call divided by 5 hrs (or 8 hrs minus 3 hrs training) times 60 minutes = 83.3% Utilization

**Alternate Points of Contact:** Refers to contact channels other than phone that a customer can use to communicate with a contact center, such as email, web chat, fax, social media, and postal mail. (See also Contact Channel.)

**Analytics and Reporting Process:** A process designed to provide a means to collect, store, and analyze call center performance data, and caller inquiry data. The products of this process are actionable reports for agents, supervisors, managers, and other departments. As financial margins in small centers are often narrow, these centers are more prone to “bleed red” when not managed efficiently.

**Annual Inbound Call Volume Handled by Agents:** This is the sum of all inbound calls routed to the agent's queue(s) that are handled by the agents.

**Annual Inbound Call Volume Handled by the IVR:** This is the number of inbound calls handled to completion by the IVR; this is often referred to as IVR “self-service.”

**Agent Satisfaction Survey (ASAT) Score:** BenchmarkPortal collects top and bottom box “overall” agent satisfaction metrics through its In-Depth RealityCheck™ benchmarking surveys. These metrics, which reflect a 5 out of 5 (i.e., “very satisfied”) rating from agents for top box, and a 1 out of 5 (i.e., “very dissatisfied”) rating from agents for bottom box, are revealing about a center when compared with other centers in its industry.

However, when BenchmarkPortal conducts a Contact Center Assessment, or a Center of Excellence Certification exercise, it goes well beyond the top box and the bottom box “overall” satisfaction metrics alone. In these cases, an in-depth survey of agents and team leads is conducted for each center. The survey includes 76 questions that are grouped into 18 categories, which include supervisor style, internal communications, customer focus and many others. Agents score each question on a scale of 1 to 5. The answers are aggregated for the center being assessed, and percentages are computed for each category.

**Automatic Call Distributor (ACD):** A device used to manage and distribute incoming calls to a specific group of terminals (agents).

**Automatic Dialer (aka, Autodialer):** A device used to generate outbound calls based on a call list, and distribute answered outbound calls to a specific group of terminals (agents) for completion.

**Automatic Number Identification (ANI):** ANI is a service of telecommunications carriers, which identifies the telephone number of the calling party. It is commonly used for billing, call routing and database synchronization. There are several specific technologies that fit under the umbrella of ANI, including caller ID.

**Auto Response:** See E-Mail Auto Responder.

**Auxiliary (AUX) Time in Percent:** This is the average amount of time per shift, in percent, that an agent is logged into an AUX state and is getting paid. For the purpose of an assessment, do not include in the AUX time percentage any work related activity directly helping/servicing a customer i.e. after call work time, outbound calls, sending faxes or emails to customers. Include only activities where the agent is not helping a customer while getting paid. The minimum AUX for most centers would be 6.25% (if you give your agents two 15 minutes breaks per day) or 30 minutes in AUX-break / 480 minutes per day = 6.25%. If you are uncertain about whether any AUX Time recorded activity should be included or excluded, please contact your Benchmark Portal Relationship Manager or Senior Consultant for assistance.

**Average Attendance in Percent:** Calculated by dividing the total number of unpaid absences annually by the total number of planned and paid shifts annually, then subtracting the resulting number from 100, expressed as a percentage. Absences that are unplanned from a scheduling viewpoint but are planned from a workforce budgeting viewpoint are not considered absences for purposes of this metric. Thus, if an agent is absent (planned, unplanned, excused, or unexcused), but has paid time to cover the absence, then the absence is not counted for this metric. However, if an agent is absent but does not have paid time to cover the absence, then this counts as an absence.

**Average contacts/transactions per agent per hour:** See Contacts/transactions per Hour

**Average Cost per Call/Contact:** See Cost per Call/Contact.

**Average Dials per Hour per Agent.** This is the sum of all outbound calls manually or automatically dialed and connected to an agent divided by the total of the agent hours devoted to outbound calls.

**Average Handle Time:** See Handle Time.

**Average Hold Time Inbound Calls:** The time during which an agent placed a call on hold during the body of a call. This is the cumulative total of all hold time, divided by the number of calls placed on hold, for the period that is measured (please use annual metrics) and typically reported in the ACD or similar contact center platform standard reports.

**Average Hourly Agent Wage (US\$):** The averaged amount of monetary compensation paid to agents working in a contact center, to be reported in US dollars/cents.

**Average Inbound After Call Work Time:** See Average Talk Time

**Average Inbound Calls Abandoned:** See Abandon Rate.

**Average Inbound Call Talk Time:** See After Call Work Time

**Average Number of Shifts per Year:** The averaged number of shifts worked annually by an agent within the reporting contact center.

**Average Occupancy in Percent:** See Occupancy.

**Average Paid Shift Length in Hours:** The average length of an agent shift, including lunch and breaks, e.g., 8 hours, 10 hours, etc.

**Average Response Time:** This is an average of the amount of time, rounded to hours, that elapse while a contact center to respond to a non-voice inbound customer contact (E-mail, Web Chat, FAX, White Mail, etc.).

**Average Sale Value per Call:** This number is determined by taking the total sales in dollars and dividing it by the total number of calls handled that result in a sale during the same period of time.

**Average Speed of Answer (ASA):** refers to the average time it takes for all calls to be answered from the time the caller selects the option in the IVR to talk to an agent (where applicable) until the call reaches an agent.

This includes a blend of calls:

- a) Calls that are placed in queue (no agents immediately available) and;
- b) Calls that are immediately picked up by an agent and thus do not need to go to queue.

**It excludes** time spent routing callers and time callers spend interacting with an IVR (interactive voice response) menu. This metric also does not include calls that are abandoned.

**Average Starting Hourly Agent Wage (US\$):** The averaged amount of monetary compensation paid to new agents hired to work in a contact center, to be reported in US dollars/cents.

**Average Talk Time:** This is the sum total of agents' time-in-talk mode (including mute & hold time while on a call), divided by the total number of calls handled by agents. Most ACD or other contact center platform systems provide this number.

**Average Time between Calls (a.k.a. Idle Time):** This is the average number of minutes during which the agent is logged into the system in a ready state, waiting for the next call. In other words, it is the average idle time in minutes an agent spends in waiting mode between calls.

**Average Time in Queue:** This is the average amount of time callers wait in queue, from the moment they enter the queue until the call is answered by an agent. This metric only applies to calls that are assigned to a queue, due to the lack of immediate availability of an agent.

**It excludes** time spent routing callers and time callers spend interacting with an IVR (interactive voice response) menu. This metric also does not include calls that are abandoned.

This is **different from Average Speed of Answer** (ASA), which includes both calls that are directed to a queue and calls that go to agents who are immediately available (and thus do not need to go to a queue).

**Average Time to Abandonment:** This is the average amount of time a customer will wait in queue before abandoning.

**Average Total Live Connects per Agent per Hour (Outbound Dialers):** This is the sum of Live Outbound Call Connects divided by total agent hours.

**Average Total Right Party Connects (RPC) per Agent per Hour:** This is the sum of all Right Party (Decision-Maker) Outbound Call Connects divided by total of all agent hours. (Typically, the correct party connection is able to lead to a resolution.)

## **B**

**Base Salary per Year:** This is the gross annual base earnings (or guaranteed earnings before incentive pay) of an agent. (Based on 2080 annual paid hours for a full time employee).

**Benchmarking:** A structured, analytical methodology that is designed to establish a reference point for performance measures. The outcomes of this process enable managers to identify, assess, and deploy those proven practices that are highly likely to enable them to gain and maintain a competitive advantage.

**Best Practice:** Best practice is variously used to describe the best performing metric in a category, or a proven process or technology that results in optimal performance as measured through benchmarking.

**Blended Agents:** The term "Blended Agents" refers to agents that are scheduled to split their workload between handling inbound calls and making outbound calls. Blended agents can also refer to agents who spend a portion of their work schedule engaged in non-telephone activities such as handling e-mails, chat sessions, back-office work, and so forth.

**Bonus or Incentive Compensation:** Annual compensation that is over and above the base wage. This is measured, per agent, by dollar or percentage above the hourly wage.

**Bottom Box Agent Satisfaction:** The percentage of lowest possible scores received on the question: "Overall, how satisfied are you with your position?" (a "lowest" score of 1 out of 5, or the bottom of whatever scale you use.)

**Bottom Box Caller Satisfaction:** The percentage of lowest possible scores received on the question: "Overall, how satisfied were you with the service you received during your call to our center?" (A "lowest" score of 1 out of 5, or the bottom of whatever scale you use.)

**Budget:** The annual call center budget is the total annual dollar amount attributed to and allocated for all expenses associated with the operation of the call center for which the call center manager is accountable. The annual budget should include all fully loaded direct and indirect costs for budgetary line items such as: labor, benefits, and incentives for agents, management, training, and support personnel; HR costs (e.g., recruiting, screening, training); telephony expenses (toll, trunks, equipment); technology purchases/installation (hardware, and software); technology maintenance (hardware and software) network; furniture, fixtures, decorations, etc.; utilities (gas, water, power, UPS backup); maintenance (repair, janitorial, upkeep); supplies; overhead expenses and charge-backs for shared corporate costs (e.g., legal, risk management, payroll administration, IT support, security, accounting, grounds keeping, real estate, floor space, common areas, etc.) as applicable.)

**Burdened Cost per Agent:** The annualized average cost of an agent, including salary, commissions, bonus, and benefits.

**Business to Business:** This is the percentage of calls exchanged with other businesses as opposed to end-user (individual customer) callers.

## **C**

**Calculated Self-Service in Percent:** The value given from total number of annual calls handled by the IVR divided by the sum of all IVR-handled calls and agent-handled calls, expressed as a percent.

$$((\text{Annual IVR-Handled Calls}) / (\text{Annual IV-R Handled Calls} + \text{Annual agent-Handled Calls}) \times 100)$$

**Call Center Performance Evaluation:** This is a process designed to provide a visible means to manage the call center and report its accomplishments to upper management. Properly implemented, it defines those key performance indicators (KPIs) that are optimal to manage the call center, determines the frequency with which to collect and analyze performance KPIs, and provides an understanding and guidance of how to manage the center if KPIs fall below goals.

**Call Quality Monitoring:** A process designed to observe and evaluate from 5 to 10 calls per month for each agent, and to record the evaluations on a monitoring form to be discussed by the Supervisor and the agent during the coaching process.

**Call Recording:** A technology that enables call centers to capture and record most customer/agent telephone interactions. See Call Quality Monitoring Process.

**Call Routing Process:** (See also ACD) This is a process designed to ensure that each call is routed to the next available agent with the proper skills and training to handle the call in the most effective and efficient manner possible. Call routing often includes identifying “high-value callers” and routing them to a shorter queue.

**Call Types:** For purposes of classification, call types are broken out into the following categories:

- **Customer Service (questions and inquiries)** – General questions, requests, inquiries, etc. calls from external customers.
- **Order Taking and Order Tracking** – Specific calls from external customers related to purchasing &/or tracking the purchase of a product(s) &/or service(s) from the company.
- **Technical Support** – Calls from external customers related to issues with products/services produced/provided by the company.
- **Complaints** – Calls from external customers who want to express dissatisfaction or displeasure with products/services produced/provided by the company.
- **Re-directing Inbound Calls** – Calls that require the agent to transfer the call to another department or specialist for resolution.
- **Other** – Contacts handled by agents that are not calls, which include Emails, Web Chats, Social Media interactions, Faxes, Postal Mail, Back Office work, etc.

**Caller Satisfaction:** This is a state of mind that a customer has regarding his or her most recent interaction with a call center. It is typically measured by asking the question: “Overall, how satisfied were you with the telephone interaction you just had?” (See also Top Box Caller Satisfaction)

**Caller Satisfaction Collection Process:** An established, routine process of gathering customer feedback regarding a recent call center contact experience. This process includes after-call IVR surveys, follow-up outbound (live agent) calls, follow-up email surveys, and the like. This is reported as the Percentage of call centers with a formal mechanism to capture caller satisfaction in our surveys and reports.

**Caller Satisfaction Outbound Process:** A standard (1 to 5) rating process of gathering customer feedback regarding a recent contact center-initiated call experience. This process includes after-call IVR surveys, follow-up outbound (live agent) calls, follow-up e-mail surveys, and the like.

**Caller Self-Service Process:** This is a process designed to a) to have the caller input into the IVR information about themselves and the reason for their call in order to minimize live-agent time, and b) to migrate low-value calls to the IVR, where the caller’s question can be answered by the IVR without the caller talking to an agent.

**Caller Service Recovery:** This process is designed ensure that follow-up to “disgruntled” callers is properly executed, that their issues are understood and, where possible and reasonable, their issues are acted upon and resolved with a win-win solution. This process is different from that of Service Improvement in that it, Service Recovery, is designed to win back disgruntled or lost customers.



**Calls Blocked in Percent:** The total number of calls that did not connect with the ACD divided by the total number of calls offered plus blocked calls multiplied by 100. These are calls that never make it to the ACD. Examples of blocked calls are: “busy signals,” “number not in service” messages, etc. This number is commonly furnished by the telecommunications provider.

**Calls Handled:** These are the total number of unique inbound calls received in a given year by the center that are completed by an agent, plus those completed by the IVR. The numeric value for calls handled must be equal to or less than calls offered, and should be approximate to the numeric value of calls offered less those abandoned. (This number is often provided by your ACD.)

**Calls Handled by Agent-Inbound:** These are the total number of unique inbound calls received in a given year by the center that are completed by an agent. The sum of this value, when added to the sum of calls handled by the IVR, should equal the value for calls handled by the center. (This number is often provided by your ACD or other contact center platform.)

**Calls Handled by Agent-Outbound:** These are the total number of outbound calls connected during a given period of time by the center that are completed by an agent.

**Calls Handled by IVR:** These are the total number of unique inbound calls received in a given year by the center that are completed by the IVR. The sum of this value, when added to the sum of calls handled by agents, should equal the value for calls handled by the center. (This number is often provided by your ACD.)

**Calls Offered:** This is the total number of inbound calls received at the ACD in a given year by the center. (This number is provided by your ACD.)

**Contacts/transactions per Hour:** The average number of customer contacts/transactions from all channels i.e. inbound calls, outbound calls, emails, web-chats, white mail, social media and other handled per agent per shift. The formula is: 60 (minutes) times the Utilization % times the Occupancy % then all divided by the average handling time for all channels. Example:

$$\frac{60 * 93.75\% \text{ Occupancy} * 75.20\% \text{ Utilization}}{4.48 \text{ minutes AHT}} = 8.80 \text{ transactions per hour per agent}$$

**Calls Resolved on First Call:** See also First-Contact Resolution.

**Contacts Resolved on First Contact:** This is the total numbers of contact that were completely resolved during the course of the first inbound contact initiated by the customer (and that therefore do not require additional contact(s) to resolve the issue) divided by total numbers of contacts handled by agents – expressed as a percent. Also known as first call resolution (FCR) and first time final

**Calls Transferred in Percent:** The total number of calls transferred by agents (due to their inability to properly or completely handle the call – for whatever reason), divided by the total number of unique calls handled by agents. This would not include voluntary transfers to other departments after resolution occurs for the initial call reason.

**Campaign:** See Outbound Call Campaign

**Campaign List:** Outbound call dialing list(s) used in connection with Automatic (Predictive) Outbound Dialers. These lists are fed into the automatic dialer throughout the calling day until all calls have been completed or until an answering machine response protocol has been employed. Uncompleted campaigns are carried over to the next day(s).

**Chat Session:** See Web Chat.

**Complaints:** See Call Types.

**Computer-Telephony Integration (CTI):** This refers to the technology that enables the coordination and integration of computers with telephone systems. Functions of CTI include: Calling Line Information Display, Screen Population (on call answer), On Screen Dial, Preview and Predictive Dial, and On Screen Call Control. For outbound calling such as telemarketing, CTI pre-dials the callers, matches the number of a called party with a customer record and displays it for reference by the agent when talking to the customer.

**Connects:** See Live Connect Percent.

**Consumer to Business:** This is the percentage of calls exchanged with people working for businesses as opposed to calls from individuals calling in their private capacity.

**Contact Channel:** See Customer Access Channels.

**Contact Types:** For purposes of classification, contact types are broken out into the following categories:

- **Customer Service (questions and inquiries)** – General questions, requests, inquiries, etc. calls/contacts from external customers.
- **Order Taking and Order Tracking** – Specific calls from external customers related to purchasing &/or tracking the purchase of a product(s) &/or service(s) from the company.
- **Technical Support** – Calls from external customers related to issues with products/services produced/provided by the company.
- **Complaints** – Calls from external customers who want to express dissatisfaction or displeasure with products/services produced/provided by the company.
- **Re-directing Inbound Calls** – Calls that require the agent to transfer the call to another department or specialist for resolution.
- **Other** – Contacts handled by agents which are not calls, which include Emails, Web Chats, Social Media interactions, Faxes, Postal Mail, etc.

**Contacts per Hour:** The total number of customer contacts from all channels handled per agent per shift, divided by the total occupied hours worked- i.e., 48 live calls + 15 Emails per shift / 6 hours occupied per shift = 10.5 contacts per hour

**Cost per Call (a.k.a. Cost per Inbound Call):** This is the sum of all costs for running the call center (Total Accounting Department reported Contact Center Budget) for the period times divided by the number of calls handled in the call center for the same period. This includes all calls for all reasons whether handled by an agent or technology, such as IVR. You can also just calculate the cost per call for agent-handled calls as follows = Budget times the percent of Agent

time spent handling Inbound Voice calls divided by the number of Agent-Handled calls. The number of Agent-handled\_calls will be captured by the ACD.

#### Cost per Contact:

a) **Across all channels:** This is the sum of all costs for running the call center for the specified period, divided by the number of contacts handled in the call center for the same period for all contact channels, including phone (live agent and IVR), e-mail, web-chat.

b) **By channel:** This is the sum of all costs for running the call center for the specified period times the percent of Agent time spent handling contacts for that channel divided by the number of Agent-Handled contacts in that channel for that period as shown in the following example:

REPORTED Budget		\$	6,651,475			
Channel	Volume	AHT (min.)	Total Time (min.)	% of Time	Share of Budget	Cost per Contact / Channel
Inbound Phone	2,117,007	6.8	14,395,648	89.51%	\$ 5,953,458	\$ 2.81
Outbound Phone	25,566	4.4	112,490	0.70%	\$ 46,521	\$ 1.82
eMail	124,370	4.25	528,573	3.29%	\$ 218,596	\$ 1.76
Web Chat	45,789	3.3	151,104	0.94%	\$ 62,490	\$ 1.36
Social Media	7,500	5.25	39,375	0.24%	\$ 16,284	\$ 2.17
White Mail	66,000	5	330,000	2.05%	\$ 136,475	\$ 2.07
FAX	80,967	6.5	526,286	3.27%	\$ 217,650	\$ 2.69
Totals	2,467,199	5.07	16,083,475	100.0%	\$ 6,651,475	\$ 2.00

**Cross-Sell:** A cross-sell occurs when an agent recognizes that the caller might be able to use a product from the same company, but in a totally different product line. For instance, an agent at a banking call center who is opening a savings account for a caller might recognize the advantage for the caller to purchase a CD from the bank at a higher interest rate.

**CTI:** See Computer-Telephony Integration.

**Customer Service (questions and inquiries):** See Call Types.

**Customer Access Channels:** Customer access channels are the multiple ways that customers can reach out and contact a company. A few of the obvious access channels are

- Telephone,
- E-Mail,
- Fax,
- Social Media

- Postal Mail,
- Web Chat
- Other, Such As Kiosk & Face to Face.

**Customer Centric:** Placing the wants and needs of the customer as the central focus of all business practices within the firm. Seeing your business through the “eyes of the customer.”

**Customer Lifetime Value:** The imputed dollar revenues or profits (depending on formula) generated by the customer for as long as the customer remains with the firm.

**Customer Relationship Management (CRM):** This process is designed to ensure that the agent taking a call is aware of all aspects of the caller’s information, including such things as purchasing history, previous contacts, credit rating, channel preferences, value to the company, and many more. The CRM process allows the agent to use this caller information to better serve the caller’s needs during the call handling experience.

**Customer Retention:** The process of keeping a customer as opposed to losing the customer to the competition. A percentage of this figure would be the tenure of the average customer with the firm as computed by the sum of the time of all customers with the firm divided by the number of customers.

**Customer Satisfaction:** This is a state of mind that a customer has about a company in which their expectations have been met or exceeded over the lifetime of the product. This leads to company loyalty and product repurchase.

**Customer Share:** The percent of those who purchase the item of interest from a given firm. This is computed as the number of customers who purchase the item from a given firm divided by the number of customers who purchase the item from all firms combined.

**Customer Value Segment:** Customer value segmentation strives to segment customers based on their financial value to the company. This value is usually based on a combination of the total amount of money that a customer spends with the company, and the profitability of that revenue stream. The best example would be the frequent flyer programs that the airlines have. United, for instance, has the following value segments with its frequent flyer program: a) regular frequent flyer, b) premium frequent flyer, and c) 1K frequent flyer.

## **D**

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**Dedicated Outbound Agent:** This describes the differentiated skill of an agent who is assigned and occupied full time to an outbound team or department in the Contact Center. Such agents typically will not switch to inbound calls or other activity during the day. This is in contrast with blended agent activity.

**Dial Attempts:** A volume measure of all dials made to a predetermined customer list. The attempt includes the ring, no answer, voice mail, and/or connects. It becomes the baseline of outbound activity typically used for occupancy confirmation.

**DNIS:** Dialed Number Identification Service. A carrier service for 800/888 and 900 numbers that forwards the number dialed by the caller to the called party.

## E

**Effectiveness Index:** The index is calculated by statistically combining into an index those metrics that are indicative of effective performance. This is considered to be a quality metric and impacts customer-focused processes.

**Efficiency Index:** The index is calculated by statistically combining into an index those metrics that are indicative of efficient performance. This is considered to be a productivity metric and focuses on the cost investment of time or money in operating the business.

**E-Mail Auto Responder:** An auto-response system automatically returns a prewritten message to anyone who submits e-mail to a particular address, whether an individual or a Web site. Auto-response systems are widely used by Web sites for the purpose of responding to visitor comments and suggestions in a preliminary way. You may see an auto-responder in cases where you purchase something online, receiving a "thank you for your order" e-mail, etc.

**E-Mail Channel Annual Volume (total):** The total number of E-Mails handled by the contact center annually.

**E-Mail Channel Annual Volume Handled by Agent:** The total number of E-Mails handled by the agents annually.

**E-Mail Channel Annual Volume Handled by AutoResponder:** The total number of E-Mails handled by an AutoResponder annually.

**External Metrics:** These are usually characterized as "soft" numbers as they are the collected attitudes, opinions, and emotions of customers or other interested parties. The data may be collected by survey, focus group, or interview methods. This represents the customer perspective.

## F

**Fax Channel Annual Volume (total):** The total number of Faxes handled by the contact center annually.

**Fax Channel Annual Volume Handled by Agent:** The total number of Faxes handled by the agents annually.

**Fax Channel Handle Time:** The total number of Faxes handled by an AutoResponder annually.

**First-Call Resolution:** See Calls Resolved on the First Call.

**First-Contact Resolution:** Similar to calls resolved on first call, this is the total numbers of contacts that were completely resolved during the course of the first contact (for that issue) initiated by the customer (and that therefore do not require follow-up or repeat call to resolve the issue) divided by total numbers of contacts handled by agents – expressed as a percent.

**Full-time Agents:** A full-time agent is one who works 40 hours or more per week, or for whatever comparable equivalent is used. In some cases, full-time agents are counted at 36 hour per week. As this is an operational metric, the specific hours worked is less important than the number of agents working in the capacity of a full-time agent.

**Full-time Equivalent (FTE):** This is an operations and workforce metric that aggregates the amount of all labor used in terms of a full-time workforce. It is derived by adding the cumulative sum of labor hours for both full-time and part-time employees for a specified period and dividing its sum by 40. Centers that experience significant seasonality in staffing should discuss questions regarding this metric with their Senior Consultant.

Total FTE's = (total average hours of full-time agents + total average hours of part-time agents)/40

## **H**

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### **Handle Time:**

**Inbound Call:** The sum of talk time, hold time, and after-call work time.

**IVR:** The average amount of time a caller spends in the IVR before the caller either hangs up or chooses to transfer to the agent queue.

**Outbound Call:** The sum of talk time and after-call work time.

**E-mail:** This is the total time, including after work time to process an e-mail transaction.

**FAX:** This is the total time, including after work time to process a facsimile transaction.

**Web Chat:** This is the total time, including after work time to process a web chat transaction.

**Postal Mail:** This is the total time, including after work time to process a White Mail transaction.

**Social Media:** This is the total time, including after work time to process a social media transaction.

**Other Productive Work:** This is the total time expended on any other productive work (e.g. back-office work) expended by agents during their work shift.

**Help Desk:** The term typically applied to a call center that primarily handles calls from employees about technical problems with their computer, monitor, printer, and the like.

**Hold Time:** The cumulative sum total of all hold time, divided by the number of calls placed on hold for the period measured **and is a standard report element of ACDs or other Contact Center platforms.** This measurement may also be derived from percent of calls held.

**Hours per Shift (a.k.a. Shift Hours):** See Average Paid Shift Length in Hours and also Shifts per Year.

## **I**

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**Inbound Call Auxiliary Time:** See Auxiliary (AUX) Time in Percent.

**Inbound Calls Average Speed of Answer:** See Average Speed of Answer (ASA).

**Inbound Calls Closed on First Call:** See Calls Resolved on First Call.

**Inbound Calls Offered:** The total number of calls that are directed (offered) to a contact center annually by their telecommunications provider. This number can be obtained from their telecommunications provider.

**Inbound Calls Handled:** The total number of calls handled annually by a contact center. This metric is available in ACD reports.

**Inbound Calls per Agent per Hour:** This is calculated using the following formula: (60 minutes X % of time spent in the Inbound Phone Channel X Occupancy % X Utilization %) divided by the sum of (Average talk time in minutes + After Call Work Time in minutes)

**Inbound Calls Transferred:** See Calls Transferred in Percent.

**Idle Time:** (See also Average Time between Calls.) This is the average number of minutes during which the agent is logged into the system in a “ready” state waiting for the next call, or in other words, the average idle time in minutes an agent is in waiting mode between calls.

**Information Access:** An internal process designed to make all information needed by the agent easily accessible on the agent’s desktop for quick and accurate answers to caller’s questions. In theory, the Information Access process defines those access points used by agents to tap into the knowledge base management system (KBMS) of the company.

**Initiate Outbound Calls:** This metric represents the average percentage of an average agent’s logged-in time devoted to initiating outbound calls.

**Internal Metrics:** These are generated by computers internal to call center technology (PBS, ACD, or VRU) or by departments such as Accounting, Finance, or Human Resources. Internal metrics are commonly perceived as “hard” numbers. Examples include average handle time, queue time, and abandon rate. These metrics generally do not reflect the view the customer has of your company.

**IVR (Interactive Voice Response):** Technology that both routes calls and allows a customer to interact with the data systems by responding to a menu of options. Responses are typically entered by pressing the keys on the telephone keypad; however, voice recognition is becoming more commonly integrated into the process.

**IVR Containment:** See Percent IVR Containment.

**IVR Opt Out:** Measured in percent, this is the number of callers who, during their call to your center, initially attempt to find solutions via the IVR, but then elect to speak with an agent. This is not the same as those who choose to speak to an agent as an initial menu option.

## **K**

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**Key Performance Indicators (a.k.a. KPIs):** A set of quantifiable measures that contact center management uses to measure and evaluate their center’s performance in terms of their operational and strategic goals. Common KPI metrics include cost per call, average speed of answer, hold time, occupancy, utilization, first call resolution, customer satisfaction and so on.

## **L**

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**Labor Union:** A legally recognized professional body organized for the purpose of supporting the needs of its members through the collective bargaining of wages, benefits, and working conditions.

**List Penetration:** (See also Campaign List.) A telemarketing metric that measures the percentage of the daily calling list (or “campaign”) that result in a completed live call.

**Live Connect Percent:** This is the percentage of calls made where a person answers divided by the total calls attempted. Within the live connects, you can measure “Right-Party (Decision Maker) Connect.” Live connects do not include hang-ups, voice-recorders, call intercepts, busy tones, etc.).

## **M**

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**Minutes of Telephone Usage:** This is the annual number of minutes of telephone usage by the call center for calls. This does not include the phone usage for executive, administrative, and support personnel. This number is often provided by your telecommunications service provider (the phone company).

**Moment of Truth:** MOT is a critical interaction between the customer and the product or service or employee that determines whether the customer will continue to purchase from the vendor.

**Multi-Channel Center:** In a multi-channel contact center, an agent handles incoming and outgoing calls, e-mail, live chats, and other tasks such as letters, Faxes etc. as needed. Need is determined by contact center traffic levels as they occur randomly throughout the shift. This differs from a blended contact center in that the traffic flow is not forecasted, regulated, or managed on a business-rules driven, scheduled basis.

## **O**

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**Occupancy (Availability):** This is the total staffed time logged in to the ACD or other technology and is available to handle inbound phone, outbound phone, e-mail, chat and other productive work (white mail or back office work), divided by the total scheduled (paid) hours at work. A simple formula to calculate Occupancy would be:  $100\% \text{ minus AUX Percentage} = \text{Occupancy}$ . The maximum Occupancy for most centers would be 93.75% (if you give your agents a two 15 minutes break per day) or 30 minutes in AUX-break / 480 minutes per day = 6.25% or an Occupancy of  $100\% - 6.25\% = 93.75\%$ . If you are uncertain about how Occupancy is calculated, please contact your Benchmark Portal Relationship Manager or Senior Consultant for assistance.

One major difference between occupancy and utilization in call centers is that Utilization only considers the time agents are **active or busy** (working helping customers), while Occupancy considers the total hours they are **available** to help customers.

**Order Taking and Tracking:** See Call Types.

**Outbound Call Campaign:** For outbound call centers, a campaign is a specific operation to call a pre-selected list of individuals for a specific purpose. (See Outbound Call Types below.)



**Outbound Call Types:** In benchmarking you can compare to others by call function in three distinct service call types: (1) Sales / Leads / Telemarketing; (2) Collections; (3) Surveys / Research / Follow-up Contacts.

**Outbound Performance Metrics:** These are all the measurements that indicate the performance of an outbound telephone agent or contact center. Examples include sales per agent per shift or measures related to results, revenue, or resolution.

**Outsourcing:** The process of contracting through a third-party, teleservices company to manage the call-handling experience for a company that: a) doesn't have the core competency to handle telephone calls from its customers, and/or b) has too many calls to handle for its existing base of trained agents. The third-party teleservices company typically specializes in call handling as their only core competency.

## **P**

**Part-time Agents:** A Part-time agent is one who works a schedule of less than 36 hours per week or whatever equivalent part-time cap is used by your center. As this is an operational metric, the specific hours worked is less important than the number of agents working in the capacity of a part-time agent, e.g, if an agent works 30 hours part-time compared to 40 hours full-time, they are .75 equivalent.

**PBX:** A telephone switching device owned by a private company vs. one owned by a common carrier.

**Peer Group:** Peer Group most often refers to the call centers that have the same profile of activities as your company. For instance, a peer group might be all call centers handling mostly inbound calls that are mostly business-to-business in a call center of over 100 agents for a company with annual revenues of over one billion dollars. Peer group does not necessarily connote competitors.

**Penetration Level:** See List Penetration.

**Percent Abandoned:** See Abandon Rate.

**Percent Agent Utilization:** See Agent Utilization Rate.

**Percent Attendance:** See Average Attendance in Percent.

**Percent Blocked Calls:** See Calls Blocked.

**Percent Calls Handled on the First Call (a.k.a. First Time Final):** See Calls Resolved on First Call.

**Percentage of Call Centers with a Formal Mechanism to Capture Caller Satisfaction:** See Caller Satisfaction Collection Process.

**Percent of Callers Giving a Perfect Score for Customer Satisfaction:** See Top Box Caller Satisfaction.

**Percent of Callers Giving the Lowest Score for Customer Satisfaction:** See Bottom Box Caller Satisfaction.

**Percent IVR Containment (aka, Percentage of IVR Self-Service):** This is the percentage of calls that were completely resolved within the IVR and were not forwarded to an agent. Formula:

$$\text{IVR containment \%} = \frac{\text{IVR handled calls}}{\text{Calls handled by the agents + IVR handled calls}}$$

**Percentage Live Connects to Total Attempts:** This is the total number of calls answered by a person divided by the total number of calls attempted. This is not the same as Right-Party Connects.

**Percentage of Agent's Time Sent on Each Contact Channel** – The average percentage of an agent's productive time each shift devoted to the following channels/activities:

- **Inbound Calls**
- **Outbound Calls**
- **Emails**
- **Web Chats**
- **Social Media**
- **Faxes**
- **Postal Mail**
- **Other (including back-office work)**

**Percentage of Calls Placed in Queue:** See Average Time in Queue.

**Percentage of Calls Transferred:** See Calls Transferred in Percent.

**Power Dialer:** A power dialer is more than simply an automatic dialer. It not only helps connect and manage the call; it can personalize calls to existing customers by bringing up related customer history and personal preferences. This can help to convey the feeling that each customer is receiving preferential treatment.

**Predictive Dialer:** A type of autodialer. A predictive dialer dials ahead of agents becoming available or when the predictive dialer matches a forecast number of available agents with a forecast number of available called parties. These processes provide large increases in dial rates and agent productivity.

**Preview Dialer:** A preview dialer automatically presents an agent with contact information prior to dialing the number. The agent has complete control over the dialing process and can inform the preview dialer if and when the call is to be placed. If the agent does not wish to proceed with the call, the preview dialer can present another contact for the agent to review. Preview dialing is an effective automated dialing technique when the agent requires more control over the call process and may prioritize which contacts are to be made. Also, if the agent requires additional time prior to the call to read through notes or call history, this technique is useful because it lets the agent manage contact preview time.

**Public Business (or Branch) eXchange:** See PBX.

## Q

**Queue Time:** See Average Time in Queue.

## R

**Real-Time Expert Hub:** A process designed to enhance the probability that each call is completed on the first call. A Real-Time Expert Hub is often staffed by subject matter experts (SME).

**Re-directing Inbound Calls:** See Call Types.

**Rejection:** The customer's state of mind such that disengagement from the current relationship has already been decided and has been or soon will be implemented. Negative word of mouth is likely to occur.

**Respond to E-mail:** This metric represents the average percentage of an agent's time devoted to responding to E-mails from customers.

**Respond to Inbound Calls:** This metric represents the average percentage of an agent's logged-in time devoted to handling inbound calls from external customers.

**Respond to On-line Web-chats:** This metric represents the average percentage of an agent's time devoted to responding to Web-chat messages from customers.

**Right-Party Connects (RPC):** This is the percentage of calls made where the intended party answers, divided by the total calls attempted. This is not to be confused with "Live Connect" which measures anyone providing a response to an outbound call connection

## S

**Semi-automatic Dialer:** An agent-controlled dialer. All actions (dialing, playing audio message, recording, and the like) are initiated by an agent, normally with the press of a key. It is a productivity tool for telemarketing agents.

**Service Improvement:** A process designed to use caller feedback from the call-handling experience to improve how future calls are handled. Properly implemented, it involves conducting caller feedback surveys, documenting complaints, fixing the caller's problem, and the process that caused the problems of the caller.

**Service Level:** This is a broad-based term that is used to measure productivity; however, its use is not exclusive to the productivity of call handling. In contact centers it commonly defines X amounts of output in Y amounts of time. For example, 80 percent of calls answered in 20 seconds.

**Shifts per Year:** On average, a full-time agent works approximately 250 shifts per year for an 8-hour shift, or 200 shifts per year for a 10-hour shift. However, the number of shifts worked by part-time agents may actually be more or less than this, depending upon the average length of shifts and numbers of shifts worked per year. This may also be interpreted as the average number of times that an agent reports to work.

**Shrinkage:** Unproductive/non-phone paid time, which requires additional Agent headcount to account for i.e. breaks, unplanned absence, coaching, team meetings, training, absenteeism, vacation, and the like.

**Single Channel Center:** Contact Centers that support a single contact channel and/or Customer function only. (e.g., Inbound Telephone calls, Outbound Calls, e-mail, etc.).

**Skills-based Routing:** A technology enabling the routing of calls to agents assigned a particular skill or set of skills. A common component of most ACD systems.

**Smart Autodialer:** A Smart Autodialer is an autodialer capable of personalizing messages and collecting touchtone or speech feedback. A speech engine is usually included for converting text to speech and recognizing speech over the phone.

**Span of Control (Agents to Supervisor Ratio):** This is the total number of agents, including leads (if used,) assigned to the control of each supervisor, expressed as a ratio.

**Speech Recognition:** A technology designed to use interpreted human speech that enables people to interact with a computerized (telephone) system.

**Staffing Model:** The Workforce Management method employed by call center management to determine the optimal number of agents to schedule per shift by using a third-party workforce management system or an in-house scheduling system. Blended staffing models are used to assign time spent on inbound vs. outbound call activity and occupancy.

**Subject Matter Expert (SME):** This is a designation specific to an organization, business unit, process, or item this is assigned to someone who demonstrates exceptional levels of expertise, knowledge, and abilities in the performance of a particular job-skill, task, or function related to the topic: a person that has an extended sense or in-depth knowledge of a particular subject.

## **T**

**Talk Time:** See Average Talk Time.

**Technical Support:** See Call Types.

**Top Box Agent Satisfaction:** The percentage of perfect scores received on the question, “Overall, how satisfied are you with your position?” (A “highest” score of 5 out of 5, or the top of whatever scale you use.)

**Top Box Caller Satisfaction:** The percentage of perfect scores received on the question, “Overall, how satisfied were you with the service you received during your call to our center?” (A “highest” score of 5 out of 5, or the top of whatever scale you use.)

**Total Calls Offered:** See Calls Offered.

**Touch-point:** Touch-point is a “buzzword” for customer access channels. (See also Alternate Points of Contact, Customer Access Channels.)

**Turnover of Full-time Agents:** See Agent Turnover.

## **U**

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**Up-Sell:** To sell a higher value product to an existing customer. For example, to lease a more expensive copier to an existing customer. (Also see Cross Sell).

**Utilization:** See Agent Utilization Rate.

## **V**

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**Value-based Routing:** A programmable form of Skills Based Routing targeted at Customer Value where customers are ranked in revenue or sensitivity value and their calls are handled by designated agents.

**Value Creating Gap:** This represents a performance gap where your call center is doing better than your peer group.

**Value Destroying Gap:** This represents a performance gap where your call center is doing worse than your peer group.

**Voice Response Unit (VRU):** See IVR.

## **W**

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**Web Chat:** An interactive keyboard messaging exchange between a customer / client / individual and a customer support representative (CSR) conducted over the company's Internet web site.

**Web Chat Session:** This is the total elapsed time from the beginning to the conclusion of an interactive Web Chat exchange, expressed in minutes.

**Workforce Management:** Related to Workforce Optimization, a process often used for call forecasting and agent scheduling using historical call data. Other functions of workforce management may include skills-based scheduling, schedule adherence, time-off administrations, performance management tools and reporting

**Workforce Optimization:** A process designed to ensure that all Contact Center personnel with the right skills are in the right seats at the right times to maximize the call center's productivity with the fewest possible resources.

**Wrap-Up Time (a.k.a. Wrap time):** See After Call Work Time.