



Contact Center Benchmark Questionnaire



Instructions

This survey may be used by Centers which handle one channel (e.g. inbound telephone transactions) as well as Multi Channel, or Blended Channels like inbound calls, e-mail, web chat, sms/social media, postal mail, or outbound contacts. Contacts may be with either external or internal customers.



For detailed metric descriptions, please use our current BenchmarkPortal Glossary

[Click Here for Glossary](#)



Your individual performance data will be kept in strict confidence on our secure servers.



Please use US Dollar equivalents when responding to all questions concerning moneys.



This PDF document is made available to facilitate your collection and reporting of data directly into BenchmarkPortal's database.



For reporting purposes, please use the same 12 consecutive months as agreed upon with your Senior Consultant. This is referred to as the "period" to be assessed. See last page for date range.



Please enter your answers to the survey questions directly into the PDF and e-mail the "signed and validated" PDF file to your Senior Consultant.

First Name:

Last Name:

E-mail Address:

Phone Number:

Company Name:

Company Website:

Contact Center Name:

Contact Center Street Address:

Contact Center City:

Contact Center State/Province:

Contact Center Zip Code:

Contact Center Country:

Industry Sectors:

Select ONE Industry that best matches your Contact Center. To view the descriptions of each industry [click here](#).

- | | |
|--|---|
| ☐ Chemicals – Pharmaceutical | ☐ Insurance - Other |
| ☐ Computer Products and Electronics | ☐ Insurance – Property and Casualty |
| ☐ Consumer Products – Consumables | ☐ Level 1 Tech Support |
| ☐ Consumer Products – Durable | ☐ Manufacturing |
| ☐ Education | ☐ Media |
| ☐ Financial Services – Annuity and Brokerage | ☐ Not for Profit |
| ☐ Financial Services – Commercial Banking and Credit Unions | ☐ Other |
| ☐ Financial Services – Credit Card | ☐ Professional Services |
| ☐ Financial Services – Other | ☐ Real Estate/MLS |
| ☐ Government Services | ☐ Retail |
| ☐ Health Care - Hospitals and Clinics | ☐ Shipping - Rail/Trucking/Air Freight |
| ☐ Health Care – Medical Equipment | ☐ Telecom |
| ☐ Health Care – Support Services / Labs – Xray – EMS | ☐ Toll Operators |
| ☐ Insurance – Health | ☐ Travel & Hospitality |
| ☐ Insurance - Life | ☐ Utilities |

Select the Channels that Your Agents Support

Contact Center Agents may support a single caller contact channel or many channels. Please identify and/or describe all of the contact channels that your Agents regularly handle in the section below.



☐ Inbound Calls

☐ Outbound Calls



☐ Follow Up To Inbound

☐ Dispatch Service Calls

☐ Other Outbound Calls

Describe Other



☐ E-Mail



☐ Web Chat



☐ SMS/
Social Media



☐ Postal Mail



☐ Fax



☐ Other

Only provide other functions that are contact related and not one of the already established channels. **DO NOT INCLUDE** activities like breaks, training, meetings, or meals.

Describe Other

Full Time Agents



Total Number of Full Time Agents:

Full Time Agents

Full-time is usually 40 hours a week. If your center uses a different measurement for full-time that is ok. We are only looking for the average number of full-time agents during the 12-month assessment period agreed upon.

Part Time Agents



Total Number of Full Time Agents:

Part Time Agents

Part-time is usually less than 36 hours a week. If your center uses a different measurement for part-time that is ok. We are only looking for the average number of part-time agents during the 12-month assessment period agreed upon.

Please Provide the Following Shift Information

On average, a full-time agent works approximately 250 shifts per year. 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.



How many work days per year for full-time agents:

Days Per Year

Average paid shift length
Full Time in hours: (incl. lunch & breaks)

Hour Shifts

Full Time paid time for breaks and meal(s) in minutes:

Minutes

How many work days per year for part-time agents:

Days Per Year

Average paid shift length
Part Time in hours: (incl. lunch & breaks)

Hour Shifts

Part Time paid time for breaks and meal(s) in minutes:

Minutes

Occupancy

Average Occupancy:

%

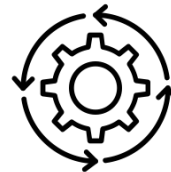


The percentage of total paid hours of an Agent's shift during which the Agent is logged in to the ACD or other technology and is available to handle inbound phone, outbound phone, email, chat and other productive work (white mail or back office work). **Formula: 100% (availability) minus Aux % (not available) = Occupancy.**

Utilization

Average Utilization:

%



Utilization is the percentage of the agents' shift **engaged in productive work**. 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, auxiliary time, and out-of-adherence time.

What percentage of contacts are business to business:



%

What percentage of contacts are business to consumer:



%

Group Total
(Total must equal 100%)

0%

Agent Turnover / Attendance

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).

Annual Percentage

Turnover Full-Time Agents:

%



Promotional Turnover:

%

Group Total
(Total must equal 100%)

0%

%

All Other Turnover:

%

Ratio of Agents to Supervisors
(Span of Control):

Agents

Average Agent Attendance in Percent:

%

This is a representing how often an agent is NOT absent from work due to an unplanned absence.

Average Agent Adherence in Percent:

%

This represents how closely an agent adheres to his/her detailed work schedule.

Breakdown of Total Contacts Handled

Please identify the contact types that your agents regularly handle during the course of their shift and the estimated time they spend for each identified contact type. Estimated percentages should total 100%. The form provides you a running total for your convenience.

General Customer Inquiries:

 %

Internal Help Desk:

 %

Other:

 %

Order Taking and
Order Tracking:

 %

Billing and Collections:

 %

Describe Other

Sales Calls:

 %

Technical Support to
External Customers:

 %

Re-Directing Inbound Calls:

 %

Complaint / Customer
Recovery:

 %

Group Total
(Total must equal 100%)

 0% %

Annual Budget

The privacy of your information is very important to us. We maintain physical, electronic, and procedural safeguards to protect your sensitive information from unauthorized access, or alteration.



Centers Annual Budget: (actual or best estimate)

\$ yr

Starting Hourly Wage:

\$

Annual Benefits (Percentage Only)

 %

Average Hourly Wage:

\$

Use 33% if not available



Inbound Calls

How many Inbound Calls are offered to your contact center annually:

 yr

Calls offered is the total number of calls you received over the last 12 months. This includes calls handled and abandoned.

**** NOTE: CALLS OFFERED are NOT calls "offered" to the agent's queue. These are every single call that was received or came into you ACD.**

Volume of Inbound Calls handled by a live agent:

 yr

These are the total number of inbound calls received in a given year by the center that were answered by your Contact Center Agents.

Volume of inbound Calls handled to completion in your IVR/AI/Virtual agent:

 yr

These are the total number of inbound calls received in a given year by the center that were completed within your IVR/AI/Virtual agent systems.

On average, what percent of Inbound Calls were abandoned:

 %

This is the percentage of calls that were connected to the ACD, but that were disconnected by the caller before reaching an agent, or before completing a process within an IVR.

Average talk time (ATT) in MINUTES (includes hold time):

 min

This is the sum total of the agents' time in-talk mode (including mute & hold time while on a call) divided by the total number of calls handled by the agents.

Average after call work time (ACWT) in MINUTES:

 min

This is the total time agents spend performing follow-up work after disconnecting from the caller, divided by the total number of calls handled by agents.

Average speed of answer (ASA) in SECONDS:

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. For more details please see the glossary.

 sec**Average Time in Queue (or delay) in SECONDS:**

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. For more details please see the glossary.

 sec**Average time before abandoning in SECONDS :**

This is the average amount of time a customer waits in queue before abandoning (hang up).

 sec**Average caller hold time in SECONDS while on phone with an agent:**

The sum total of all hold time, divided by the number of calls placed on hold for the same time.

 sec**Average auxiliary (Aux) time in percent:**

This is the average amount of time that an agent is logged into an Aux state **and is not directly Helping/Serving** a customer. For more details please see the glossary.

 %**Percent of calls put on hold by the agent:**

This is the total average percentage of calls that agents put on hold while the agents performed certain tasks that required the caller to wait on hold.

 %

Percent of calls transferred by an agent:

The total number of calls that were transferred by agents (**due to their inability** to properly handle the call for whatever reason) divided by the total number of calls handled by agents.

 %

Calls resolved on first call in percent (FCR):

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.

 %


Outbound Call Metrics

Annual agent completed Outbound Calls:

This is the total number of Outbound Phone calls generated by your agents annually.

 yr

Average talk time per Outbound Call in minutes:

 min

Average after call work time per Outbound Call in minutes:

 min


E-Mail Metrics

Annual volume of E-mail handled by agents:

 yr

Volume of E-mail handled by auto-response:

 yr

Average speed of answer in HOURS (use decimal if necessary):

This is the average time to respond to an E-mail

 hr

Average total handle time per E-mail session in MINUTES:

This is the total time including after work time to process an E-mail.

 min

Average first-contact E-mail resolution rate in PERCENT:

 %



SMS/Social Media Metrics

Annual volume of SMS/Social Media sessions handled by agents:

 yr

Average Speed of Answer in HOURS (use decimal if necessary):

 hr

Average total handle time per SMS/Social Media session in MINUTES:

This is the total time including after work time to process a SMS/Social Media session

 min

Average First-Contact SMS/Social Media resolution rate in PERCENT:

 %

Web Chat Metrics

Annual volume of Web Chats handled:

 yr

Number of simultaneous chats handled:

(example 3 chats handled at the same time)

Average total handle time per Web Chat session in MINUTES:

This is the total time including after work time to process a web chat transaction.

 min

Postal Mail Metrics

Annual volume of Postal Mail transactions handled:

 yr

Average total handle time per Postal Mail transaction in MINUTES:

This is the total time including after work time to process a White Mail.

 min



Fax Metrics

Annual volume of Fax transactions handled:

 yr

Average total handle time per Fax transaction in MINUTES:

This is the total time including after work time to process a fax.

 min


Other Metrics – Agent Handled, customer serving or handling activities not included in any other channel

Annual volume of Other Transactions handled:

 yr

Average total handle time per “Other” Transaction in MINUTES:

This is the total time including after work time to process the Other Transaction.

 min


Customer Satisfaction

Contact Center has a formal customer satisfaction collection process:

☐ Yes ☐ No

Primary method used to collect caller feedback on their call experience:

☐ After Call IVR Survey
☐ Follow-up Outbound
☐ Follow-up E-mail

☐ Follow-up Postal Mail
☐ Other

Customer Satisfaction Percentage Score

On average, in the past 90 days, to the question, “Overall, how satisfied were you with your experience,” what percentage of your customers gave you the following scores:

Group Total
(Total must equal 100%)

0% %

Very Satisfied

 %

Satisfied

 %

Neutral

 %

Dissatisfied

 %

Very Dissatisfied

 %



Agent Satisfaction

Contact Center has a formal mechanism for gathering agent feedback: ☐ Yes ☐ No

Agents represented by a labor union: ☐ Yes ☐ No

Agent Satisfaction Percentage Score

On average, in the past 90 days, to the question, "Overall, how satisfied are you with your position," what percentage of your agents gave you the following scores:

Group Total
(Total must equal 100%)

0% %

Very Satisfied

Satisfied

Neutral

Dissatisfied

Very Dissatisfied

%

%

%

%

%



Technology Platforms

Center CTI-enabled: ☐ Yes ☐ No

Center utilizes an automatic dialer: ☐ Yes ☐ No

Do you use VOIP: ☐ Yes ☐ No

Select the ACD vendor you use:

3CX

Other: Describe

Call Routing and distribution system your center uses:

☐ PBX ☐ ACD ☐ Cloud Based / Hosted

☐ AI / Virtual Agents ☐ Other

Call Routing and distribution system your center uses:

☐ DTMF (touchtone) ☐ Speech Enabled ☐ Cloud Based / Hosted ☐ Directed Language

☐ Natural Language ☐ Other Describe

Would you be interested in a free review of your telecom bills to determine how to reduce these costs? ☐ Yes ☐ No

Data Date Range:

Start Date

End Date

Sign Here:

Name:
