



Benchmark Report for Contact Centers in the

"Sample Industry" Industry

From the world's largest & most
respected database of contact
center metrics

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2023 Report



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“Note: In order to offer the latest information and metrics, content and material in this document may be updated without prior notice.”

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We wish to extend our thanks to the many contact center managers who have contributed to our database over the years. We would also like to acknowledge the contribution of colleagues who have provided both inspiration and perspiration to make this effort useful to managers all over the world. In particular, we note the founding contributions of our former partners, Dr. Jon Anton and David Machin, and the constant support of retired Professor Richard Feinberg of Purdue University.

We also thank our report team, especially Michael Feinberg, Alan Pottkotter and Sergio Ramazzina for their untiring efforts to make these reports the best value available for the contact center industry.

Bruce L. Belfiore, Senior Research Executive
David Raia, Senior Research Manager
Jose Perez, Senior Research Manager



Chapter 1: Introduction



1. Chapter 1: Introduction

“Every enterprise, in every sector, can benefit from comparing itself to other similar operations. This promotes a process of creative soul-searching regarding comparative strengths and weaknesses, which, in turn, leads to identification and adoption of best practice improvements. We have repeatedly seen the transformative power of systematic benchmarking for customer contact centers.” ~ Bruce Belfiore, BenchmarkPortal

Please Note: We take the opportunity in our 2023 Industry Reports to signal the impact caused by the recent COVID-19 pandemic and post Pandemic years, in addition to the effect that advancements in contact center technology have had on contact center performance metrics. These elements have had significant impacts on the collecting of KPI data and on the data as well. Some metrics have changed noticeably as a result.

Benchmarking has proven to be an important tool for managers. Comparing operating metrics and methodologies with other enterprises in the same industry has provided managers a structured approach to contact center performance issues with useful insights, resulting in a fact-based process of discovery, action and improvement that leads to superior performance.

Superior performance in customer contact is more important today than ever. As products become commoditized, it is the service aspect which determines loyalty and repeat sales in more and more industries. Knowing your competitive position on the customer service you provide is key.

Contact centers are ideal operations for benchmarking for several reasons:

- ✓ They all have software service platforms that automatically capture large quantities of data on key performance metrics. Unlike industries where gathering apples-to-apples data is a long and laborious process, gathering data for contact centers is easier and can now be substantially automated under a patented process pioneered by BenchmarkPortal.
- ✓ Senior managers look to contact centers to prove their value to the organization on a regular basis. Regular benchmarking of the contact center provides management the performance-based information needed to make decisions on staffing, training, technology acquisition, and other investment and budget-related matters.
- ✓ Contact centers are the enterprise's “front door” to customer experience, satisfaction and loyalty. The center's relative performance on quality metrics can reveal volumes about its competitive position against its industry.

We invite you to consider a client-specific, in-depth Benchmark Assessment, as well as our certificated training courses, which are offered for all levels of contact center professionals.

Why BenchmarkPortal?

Since beginning its benchmarking activities on the campus of Purdue University in 1995, BenchmarkPortal has gained a reputation as the source for the broadest and most reliable database for the contact center industry. Data we receive goes through a multi-layered scrubbing process to ensure accuracy. This includes both automated statistical parameters, as well as human quality control. In addition, BenchmarkPortal was awarded a patent for its advanced benchmarking process. As a result, BenchmarkPortal is considered the gold standard for data in our sector.

By monitoring competitive position with the help of BenchmarkPortal benchmarking, and identifying areas that require improvement, contact centers can make continuous improvement a part of their culture. The ROI that results from this approach provides quantifiable proof of efficiency and effectiveness, as well as a source of self-funding for technology and process improvement initiatives.

BenchmarkPortal has developed a balanced scorecard process which is explained in Appendix B (The Tonchev Performance Index) and which lies at the heart of the benchmark reports we create for individual companies (called *Contact Center Benchmark Reports*).

A Balanced Scorecard Identifies Gaps Compared with Your Peer Industry					
Effectiveness Metrics	Your Value	Industry Average	Efficiency Metrics	Your Value	Industry Average
Top Box Caller Satisfaction in Percent			Contacts per Agent per Hour		
Bottom Box Caller Satisfaction in Percent			Cost per Inbound Call in Dollars		
Top Box Agent Satisfaction in Percent			Average Talk Time in Minutes		
Bottom Box Agent Satisfaction in Percent			Average After-Call Work Time in Minutes		
Calls Closed on First Call in Percent			Average Occupancy in Percent		
Average Speed of Answer in Seconds			Average Utilization in Percent		
Calls Transferred in Percent			Adherence to Schedule in Percent		
Average Hold Time in Seconds			Average Agent Attendance in Percent		
Average Time in Queue in Seconds			Auxiliary Time in Percent		
Average Calls Abandoned in Percent			Turnover of Full-Time Agents in Percent		

Our industry reports evolve over time and continue to do so in order to provide a robust and current view of the Customer Service industry. We have also, over time, launched our Multi-Channel Benchmark Performance Survey, which includes more data from the email, chat, social media and other channels. It takes time to develop enough validated data to provide these alternative channel metrics on an industry-specific basis. In the meantime, we include here metrics that are gathered from all industries combined.

Please Note: We take the opportunity to signal the impact that the COVID-19 pandemic has had on contact centers - - on the gathering of data and on the data itself. Naturally, there have been some metrics that have changed noticeably as a result in many sectors.

We hope that you find this report useful and a stimulant for improvement. If comparing your metrics to your industry causes you to take just one important action to improve your operations, we will feel we have done our job. Please contact us with any questions or requests for further assistance. Contact centers are our passion, and we are happy to share our insights with you.



Chapter 2: User Guide



2. Chapter 2: User Guide

Most users of our Industry Reports fall into one of two categories:

1. Contact Center Managers

This Industry Report is a great first step into benchmarking for many contact center managers. They want to become familiar with the Key Performance Indicator metrics of the contact center sector, without making the commitment to assemble all of their own metrics. For these purchasers we offer a complimentary one-hour session with one of our experts, to walk through the report and discuss the metrics and what they can mean to managers.

Ultimately, we hope that managers will consider becoming one of our In-depth Benchmarking Assessment clients and database contributors. In fact, if you decide to join our large community of data contributors within 90 days of buying this Industry Report, we will offer you one free individual Multi-channel Contact Center Benchmarking Report, which shows your metrics side-by-side with your industry peers.

To view a sample individual Multi-channel Contact Center Benchmarking Report, please visit our website: [CLICK HERE](#)

2. Consultants and Analysts

Most consultants and analysts buy our Industry Reports to allow them to benchmark their clients as part of a larger engagement. We understand that you are primarily interested in the numbers, so we have made them easy to find and to use.

You may use them in your analyses and presentations to clients, with proper attribution to BenchmarkPortal as your data source.

However, we would also like you to know that we may be available, under appropriate circumstances, to work with you on your consultant teams. We have a very collegial group of contact center experts who can add experience and depth to your teams and add value to your client engagements.

If you would like to discuss the possibility of having BenchmarkPortal work with you as a consulting partner on your engagements, please contact us at:

[CLICK HERE](#)

A link to our BenchmarkPortal's complete Glossary of Terms is found in Appendix A of this Report.



Chapter 3: Methodology



3. Chapter 3: Methodology

Our data is gathered on a continuous basis using one of three means:

- The majority of our BenchmarkPortal data points are gathered from the many Contact Center Benchmark Questionnaires (CCBQ) submitted by clients as a critical part of the benchmark assessment and Report process.
- Participants can download the benchmarking survey from the BenchmarkPortal website. They can print and complete the survey by hand and then scan or fax it to us for insertion into our database.
- Participants can also subscribe to iBenchmark, our automated process that receives many metrics directly from the participants' systems and enters them into our database. Data that does not come directly from systems data (such as budget and agent turnover) are input manually once or twice a year by the participants via a survey portal.

Data that is submitted by survey participants are subject to three levels of rigorous quality checking, to ensure that our database remains accurate. The first level involves static parameters, which are set by our statistical experts. The second level of quality assurance involves a series of cross-check formulae, which utilize the data provided to validate key pieces of data. For example, if the sum of the average talk time plus the average after call work time multiplied by the average number of calls per agent per hour yields a number over 60 minutes, the anomaly will result in a red flag for our database department. We will then reach out and work with the participant to identify the proper metric from their management reports. The third level of scrutiny is provided directly by our Research team members, who review each survey report individually.

This commitment to quality distinguishes BenchmarkPortal's database from other industry sources which simply take in metrics as entered by participants. While this level of scrutiny requires considerable effort and cost, we are committed to providing the best data possible to our industry.

We note that, as more centers adopt the patented iBenchmark automated benchmarking, the less impact there will be from human error. Automating the entry of data and provision of reports, utilizing our patent-protected system, ensures that the correct data are being entered "at the source" for the majority of the key performance metrics.

All individual metrics are held as completely confidential and are never revealed with the name of the participant to third parties. Only aggregated data are published in our Industry Reports, such as the one you are reading now.

The data sets are all tagged by industry sector, as well as by other characteristics, such as country of origin. This allows us to create reports that are drawn entirely from one industry sector. Custom reports can be generated by using parameters agreed with the client. The report generator accesses the data and calculates the industry

averages. It also segregates the top quartile (25%) of the data sets and shows the average for these top-performing centers under the "Upper-Quartile" column. To determine which centers to include in the Upper Quartile calculation, we do the following:

- We separate the performance metrics into two categories: efficiency metrics that correspond to costs (these are metrics such as cost per call, talk time, after-call work time, etc.) and effectiveness metrics, which correspond to quality (caller satisfaction, first contact resolution, etc.). In this way we place balanced emphasis on the elements that reflect quality of customer service and elements that indicate careful use of company resources.
- The two groupings of metrics are put through separate expert formulae to calculate two coefficients: the cost index (indicating overall efficiency) and the quality index (indicating relative overall effectiveness).
- The two indices are added together for each center, and the centers are stack ranked by their combined scores.
- The top quartile of the centers is selected out.
- The averages for each metric are calculated from this upper quartile of centers.

Note that use of this methodology means that not every upper quartile average will be better than the overall industry average. Centers that perform better overall may be less strong (compared with the industry) for specific metrics.

Additional Note on the Pandemic Impact.

As stated in Chapter 1, the COVID-19 pandemic had a major impact on our industry and the people working in it. This, in turn, affected the metrics which many centers submitted. After hours of study and discussion, our Research Department has decided to use rolled up averages for 2018, 2019, 2020, 2021 and 2022 to account for this phenomenon. These averages include the two years before the pandemic, the height of the pandemic, and the period immediately post pandemic. This approach flattens the spikes and the fall-off in performance during the most difficult years. The Trends Analysis section helps to put some of the peaks and valleys into perspective.

Thank you for acquiring this report. Please let us know if you have any questions or comments or wish to discuss purchase of a customized report.



Chapter 4: Key Performance Indicators (KPIs)



4. Chapter 4: Key Performance Indicators (KPIs)

This chapter provides focus on individual metrics of interest to contact center managers and analysts. The metrics are grouped according to the following categories:

Section One:	Contact Center Classification
Section Two:	Contact Center Costs
Section Three:	Contact Center Performance
Section Four:	Customer Satisfaction
Section Five:	Human Resource Management
Section Six:	Multi-Channel Metrics

Section One: Contact Center Classification

In this section we graphically depict the survey results of selected contact center classification questions.

Question: Which functions do your agents provide regarding inbound contacts?

Inbound Contacts by Type

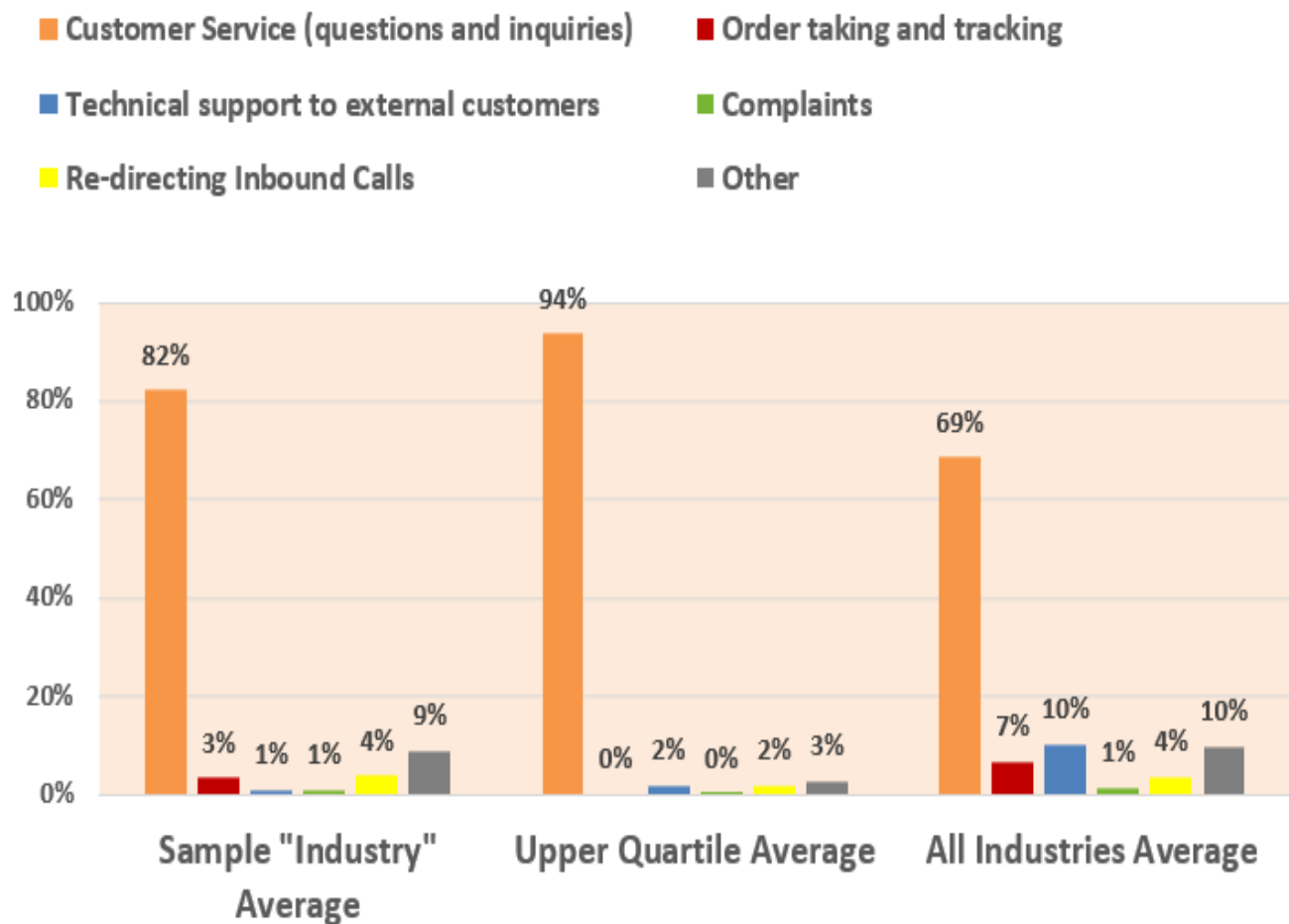


Figure 1: Inbound Contacts – Call Types

Section Two: Contact Center Costs

This section graphically depicts survey results regarding contact center cost performance.

Question: What is your average cost per inbound Agent and IVR handled Voice 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 percentage 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.

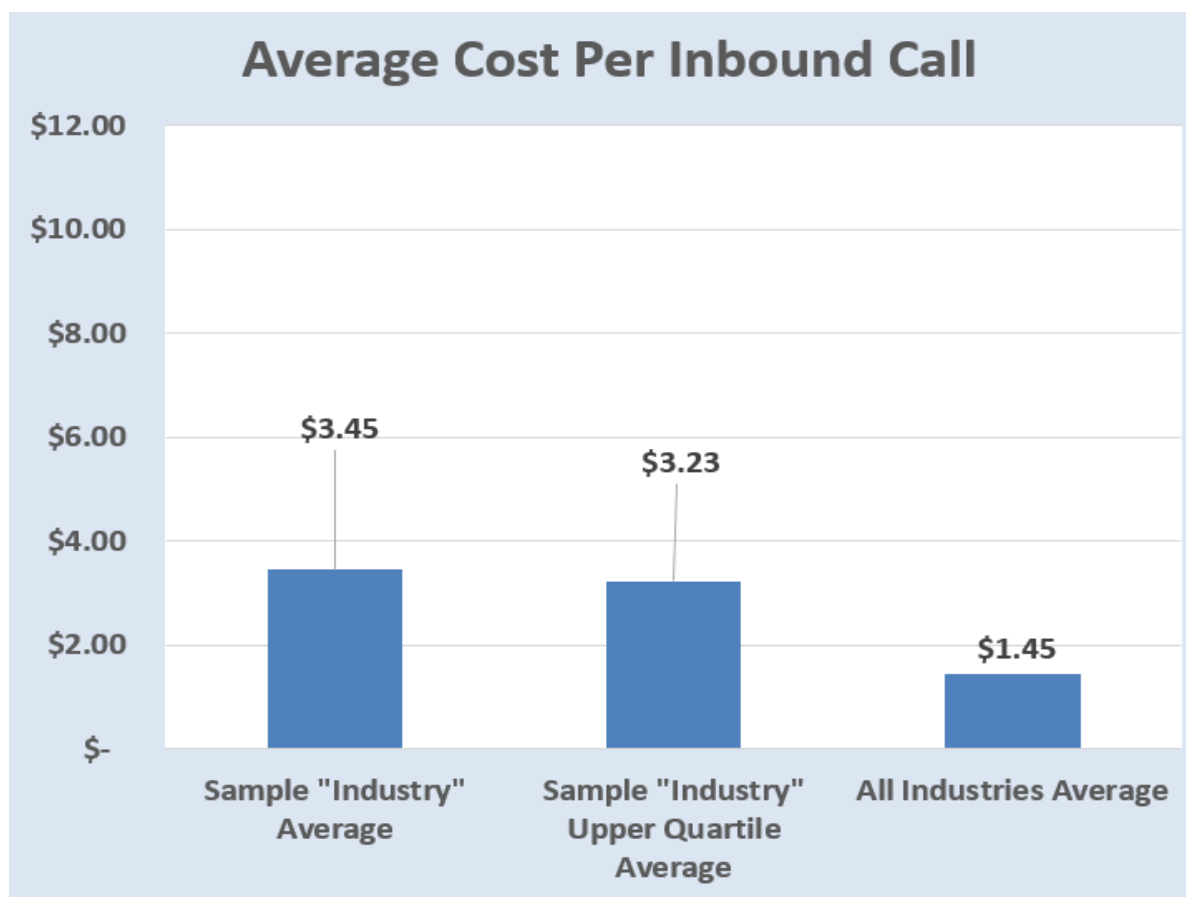


Figure 2: Average Cost per Inbound Call



There are 10 additional highlight charts & interpretations included in this chapter.



Chapter 5: Detailed Benchmark Results – All Metrics – All Channels



Chapter 5: Detailed Benchmark Results – All Metrics – All channels

Classification Questions	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Calls Offered	*****	*****	*****
Calls Handled Annually	*****	*****	*****
Annual Call Volume Handled by Agents	*****	*****	*****
Annual Call Volume Handled by IVR	*****	*****	*****
Business to Business	*****	*****	*****
Business to Consumer	*****	*****	*****
Full Time Agents	*****	*****	*****
Part Time Agents	*****	*****	*****
Full Time Equivalents (FTE's)	*****	*****	*****
Labor Union (Yes)	*****	*****	*****
Labor Union (No)	*****	*****	*****
Call Type (Question & Inquiries)	*****	*****	*****
Call Type (Order Taking / Tracking)	*****	*****	*****
Call Type (Technical Support)	*****	*****	*****
Call Type (Complaints)	*****	*****	*****
Call Type (Re-directing Inbound Calls)	*****	*****	*****
Call Type (Other)	*****	*****	*****

Financial	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Annual Budget	*****	*****	*****
Agents Base Salary	*****	*****	*****
Average Hourly Wage Front Line Agents	*****	*****	*****
Average Starting Hourly Wage Front Line Agents	*****	*****	*****
Average Cost Per Call <i>(Includes IVR)</i>	*****	*****	*****
Average Cost Per Contact <i>(Includes IVR)</i>	*****	*****	*****

Chapter 5: Detailed Benchmark Results – All Metrics – All channels

Agent Time Per Channel	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Inbound Phone	*****	*****	*****
Outbound Phone	*****	*****	*****
E-mail	*****	*****	*****
Web Chat	*****	*****	*****
Other	*****	*****	*****

Voice Channel Performance Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Speed of Answer in Seconds	*****	*****	*****
Average Talk Time in Minutes	*****	*****	*****
Average After Call Work Time in Minutes	*****	*****	*****
Average Queue Time in Seconds	*****	*****	*****
Average Caller Hold Time in Seconds	*****	*****	*****
Average Abandoned Rate in Percent	*****	*****	*****
Calls Resolved on First Call In Percent (FCR)	*****	*****	*****
Agent Occupancy in Percent	*****	*****	*****
Adherence to Schedule in Percent	*****	*****	*****
Average Attendance in Percent	*****	*****	*****
Average Calls Transferred in Percent	*****	*****	*****
Average Auxiliary (AUX) Time in Percent	*****	*****	*****
Average Utilization in Percent	*****	*****	*****
Calls Per Agent Per Hour	*****	*****	*****

Chapter 5: Detailed Benchmark Results – All Metrics – All Channels

Human Resources Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Span of Control (Agent:Supervisor Ratio)	*****	*****	*****
Annual Turnover	*****	*****	*****
Promotional Turnover	*****	*****	*****
All Other Turnover	*****	*****	*****
Number of Shifts (Full Time)	*****	*****	*****
Number of Shifts (Part Time)	*****	*****	*****
Shift Length in Minutes (Full Time)	*****	*****	*****
Shift Length in Minutes (Part Time)	*****	*****	*****
Formal Method Collect Agent Satisfaction (Yes)	*****	*****	*****
Formal Method Collect Agent Satisfaction (No)	*****	*****	*****
Top Box Agent Satisfaction	*****	*****	*****
Bottom Box Agent Satisfaction	*****	*****	*****

Caller Satisfaction Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Formal Method Collect Caller Satisfaction (Yes)	*****	*****	*****
Formal Method Collect Caller Satisfaction (No)	*****	*****	*****
Top Box Caller Satisfaction	*****	*****	*****
Bottom Box Caller Satisfaction	*****	*****	*****

Chapter 5: Detailed Benchmark Results – All Metrics – All Channels

Outbound Call Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Outbound)	*****	*****	*****
Average Talk Time in (Minutes)	*****	*****	*****
Average After Call Work Time (Minutes)	*****	*****	*****
Average Cost Per Call (US Dollars)	*****	*****	*****

E-mail Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (E-Mail)	*****	*****	*****
Average Speed of Answer (Hours)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average First Contact Resolution (Percent)	*****	*****	*****
Average Cost Per E-mail (US Dollars)	*****	*****	*****

Social Media Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Social Media)	*****	*****	*****
Average Speed of Answer (Hours)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average Cost Per Social Media (US Dollars)	*****	*****	*****

Chapter 5: Detailed Benchmark Results – All Metrics – All Channels

Web Chat Metrics	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Web Chat)	*****	*****	*****
Average Speed of Answer (Seconds)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average First Contact Resolution (Percent)	*****	*****	*****
Average Cost Per Web Chat (US Dollars)	*****	*****	*****

Fax	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Fax)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average Cost Per Fax (US Dollars)	*****	*****	*****

Postal Mail	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Postal Mail)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average Cost Per Postal Mail (US Dollars)	*****	*****	*****

Other	"Sample Industry" Average	"Sample Industry" Upper Quartile Average	All Industries Average
Average Annual Volume (Other)	*****	*****	*****
Average Handle Time (Minutes)	*****	*****	*****
Average Cost Per Other Transaction (US Dollars)	*****	*****	*****



Chapter 6: Trends In Selected Contact Center Metrics

(All Industries Averages)



Introduction

As heir to the industry's first call center benchmark studies, launched at Purdue University over two decades ago, BenchmarkPortal has a wealth of data of interest to contact center managers and consultants. The statistical trends in this section reflect yearly changes in contact center KPIs across All Industries, with focus on the past decade.

The first groups of graphics look at quality-related items, while the second group considers cost-related metrics over time.

There are

- 5 Effectiveness(Quality) Performance trend charts & analysis,**
 - 6 Efficiency (Cost/Productivity) Performance trend charts & analysis, and**
 - 3 Alternate Channel trend charts & analysis**
- presented in this chapter.**



Chapter 7: Frequently Asked Questions



This FAQ contains common questions asked by contact center professionals who have purchased our Industry Reports

Question	Answer
How are your Industry Reports produced?	Members of our benchmark community provide us data via surveys. When a contact center professional participates in our flagship survey, the Contac Center Benchmark Questionnaire (CCBQ), their data is scrubbed, validated, cataloged in their industry, and then housed in our databases. We then take the data and run the averages that appear in the Industry Reports.
What Industries are reported on within an Industry Report?	Each standard Industry Report covers a single Industry. Please refer to our website
What kind of Key Performance Indicators (KPIs) are measured within your Industry Reports?	We report metrics for general classification (i.e. size, business orientation), contact center costs and contact center quality. You may download a sample Industry Report Click Here
How current is the data contained in your Industry Reports?	The reports are updated annually.
Can I get a list of the contact centers that participated in your Industry Report(s)?	Our confidentiality policy prevents us from disclosing the identity/contact information for any individual participant. A copy of the confidentiality agreement can be found at the following Web address: www.benchmarkportal.com/cs.pdf
Where can I purchase additional Industry Reports?	Additional reports can be purchased via our Web site at www.BenchmarkPortal.com (then click on Benchmarking / Industry Reports)
What format does the report come in?	Industry Reports are delivered electronically in Adobe PDF format

Chapter 7: Frequently Asked Questions

	using a download link and password sent to the purchaser by email.
I would like to order an Industry Report, what is the earliest I can get it after placing an order?	Reports that are current (updated within the past 12 months) are provided within 2 business days of receipt of order. Reports that require updating are usually shipped within 7-12 business days.
What if I am looking for a custom cut within an Industry? Can an Industry Report be produced that can suit my needs?	We can do custom cuts upon request. Custom Industry Reports take time to produce, so it will typically take 10 – 14 days. Prices of custom reports are quoted on an individual basis.
I have a list of companies I would like Industry data on. Can you produce a custom Industry Report?	For a fee of \$300, we will scan the database to determine the percentage of companies you listed that are included in our database that we could roll-up into a custom Industry Report. However, as per our confidentiality statement, we cannot and will not disclose the name of any single company or group of companies included in a specific report. If an order is subsequently placed, the \$300 search fee will be deducted from the purchase price.
In Chapters 3 & 4 of the report, how do you define “Upper-Quartile”?	See Chapter 3 – Methodology.



Appendix A: Glossary of Terms for Contact Centers

[CLICK HERE](#)





Appendix B: Tonchev Performance Index



Tonchev Performance Index

1. Introduction

Indexes have been widely used to measure the market performance of companies active in diverse industry sectors. However, as the business processes become more complex and inter-dependent there is an emerging need for a structural analytical methodology that thoroughly examines all the aspects of the company's performance. In response to this challenge, the Tonchev Performance Index (TPI) was developed to match the performance requirements of the Contact Center Industry. The index's objectives, structure, calculation and characteristics are briefly described in this paper to facilitate its understanding and utilization.

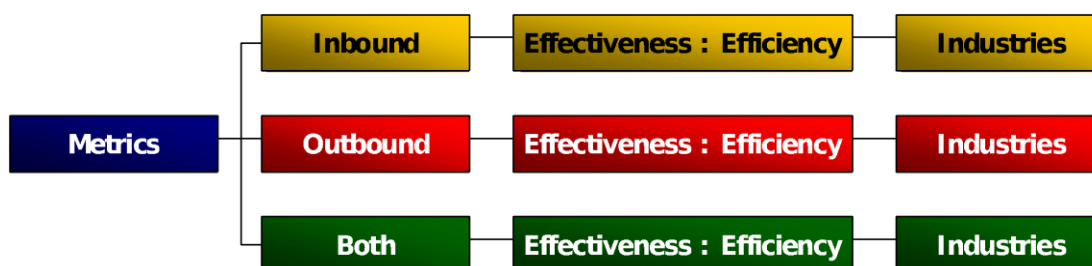
2. Objectives

The Tonchev Performance Index (TPI) has the following six objectives:

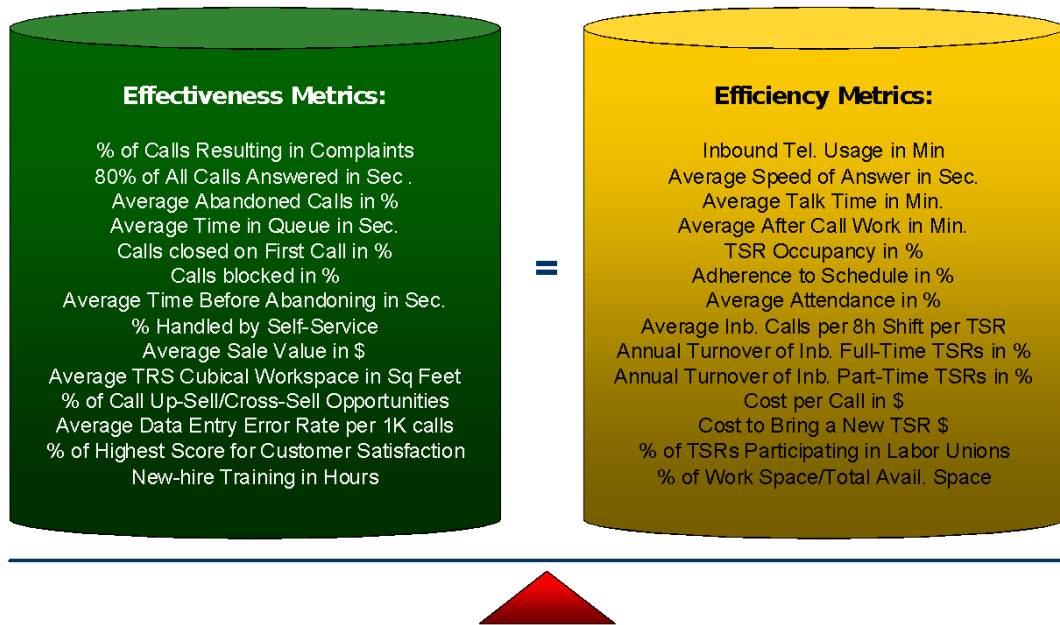
- 1. Business Performance Measurement:** to quickly and quantitatively describe a company's Contact Center as compared with its industry peers.
- 2. Effectiveness and Efficiency Balance:** to take into consideration the balance needed between effectiveness (quality) and efficiency (productivity).
- 3. Industry and Operations Sensitivity:** to evaluate the Contact Center's performance based on both industry and business criteria.
- 4. Mathematical Normalization:** to normalize all key performance indicators so that metrics are expressed in identical and comparative units.
- 5. Simplified Calculation:** to be easily comprehended, calculated and believed
- 6. Adjustment Allowances:** to allow adjustments and updates without major re-design.

3. Index Structure

Considering the above-mentioned objectives, the TPI index has a multi-level division of its composite metrics. The first division is by types of Contact Centers. Here, there are three possibilities: inbound, outbound, and both. For each of these three categories, there is a further split into equal amounts of effectiveness and efficiency key performance indicators. The idea behind this separation is to achieve a balanced model that realistically measures a Contact Centers' performance. Finally, the last metrical division is by industry types. (Please, see the two figures below.)



A Balanced Model (example)



4. Index Calculation

The main TPI index's formula is:

$$\text{TBPI} = (Q + P) - \frac{|Q - P|}{k}$$

Q = Effectiveness Metrics

P = Efficiency Metrics

k = "Out-of-Balance" Penalty Factor

$$Q = \sum_{i=1}^n C_{q,i} * \frac{(KPI_{q,i} - KPI_{q, \text{industry_average_for_i}})}{KPI_{q, \text{industry_average_for_i}}}$$

$$P = \sum_{i=1}^m C_{p,i} * \frac{(KPI_{p,i} - KPI_{p, \text{industry_average_for_i}})}{KPI_{p, \text{industry_average_for_i}}}$$

KPI = Key Performance Indicator

n = Total Number of Effectiveness KPIs

m = Total Number of Efficiency KPIs

$n = m$ (Balanced Model)

$KPI_{q,i}$ = Effectiveness KPI

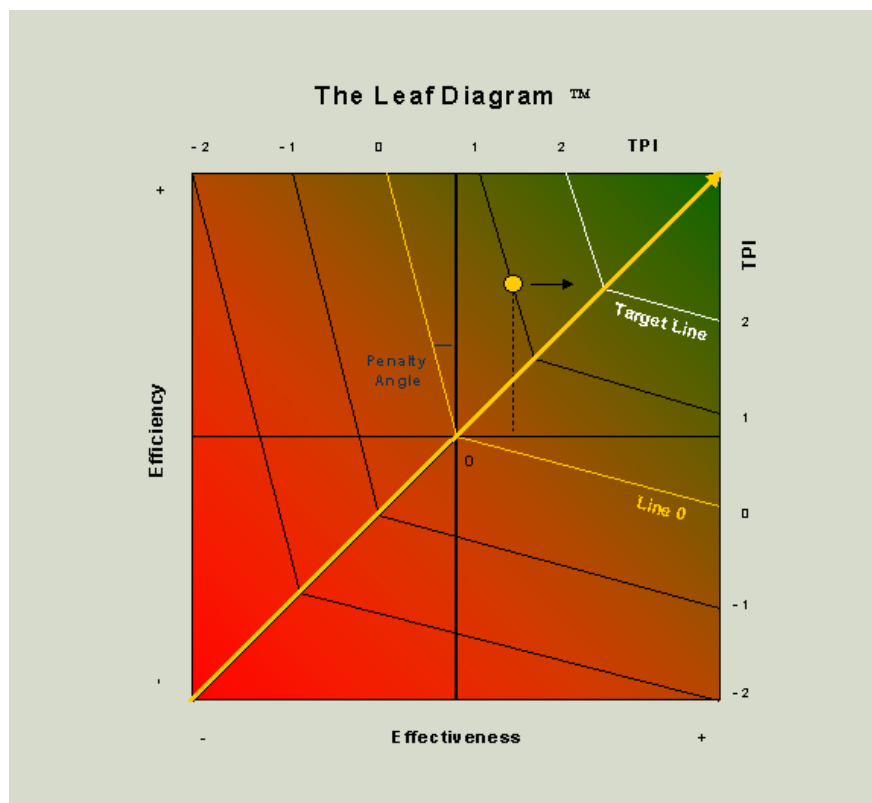
$KPI_{p,i}$ = Efficiency KPI

$C_{q,i}$ = Gap Direction Coefficient

$C_{p,i}$ = Gap Direction Coefficient

5. Graphical Presentation of the TPI index

The Tonchev Performance Index is graphically represented by "The Leaf Diagram" (See the figure below). This diagram is a type of matrix with two axis: effectiveness and efficiency. Diagonally, across the center of the matrix, there is a yellow line that shows the balance between the two parameters. Additionally, there are "Line 0" and "Target Line". The first line shows the combination of points with TPI index equal to zero, whereas the second line points the desired performance. The slope of these lines determines how much a particular company is penalized for not being able to balance quality with productivity. The closer a given point is to the upper right side of the balance line, the higher the TPI index and therefore the better the performance.



6. Advantages and Limitations of the TPI Index

The TPI index differs substantially from the conventional performance indexes. Its main advantages and limitations can be summarized as follows:

Advantages:

Balance between effectiveness and efficiency - Equal attention is paid on both goals. Therefore, if there is an imbalance between effectiveness and efficiency, the company's performance is penalized, and the index is lower.

Transparent Results – The index value tells exactly the company's deviation from the industry average. Depending on the performance, this value can be positive, neutral, or negative.

Normalization – All metrics included in the index calculation have the same units, namely they are all in percent, (%).

Adjustability – When necessary, the index allows updates and corrections.

Comparability – Since the company performance is measured by percentage deviation from the industry average, the index compares “apples with apples”.

Dynamics – Except for the penalty factor, the index does not rely on static coefficients. Instead, it is based on dynamic industry data.

Limitations:

Database Requirement – The index requires a large database.

Pair Principle – Since the index's effectiveness-efficiency balance must exist, the addition of new effectiveness metrics always has to correspond with the inclusion of equal amounts of efficiency metrics.

Penalty Factor – Even though the penalty factor has a logical justification its value can be biased.

In Conclusion

The TPI index is a performance benchmark tool that gives a numerical value of the Contact Centers' performance. It is a balanced index that can be used for comparisons of different types of Contact Centers with various business operations. The strength of the TPI index is its simplicity and dynamic nature. It can help organizations to identify their weak areas and show the path leading to improved financial and market results. In conclusion, just as the finish time determines the performance of the long-distance runner, the TPI index is a single aggregate value that measures a Contact Center's competitive performance.



Appendix C: Principal Investigators



Principal Investigators

Bruce Belfiore



Bruce Belfiore is CEO and Senior Research Executive of BenchmarkPortal, which provides key performance metrics and offers best practices information to the customer contact industry worldwide.

Bruce is the host of *CallTalk™*, the industry's first online radio talk show dedicated to contact center topics. Through *CallTalk* and his frequent articles, he provides innovative thought leadership for the contact center sector.

He is the author of the books *Benchmarking for Profits!* a manual for best practices contact center benchmarking, as well as its sequel, *Benchmarking at its Best for Contact Centers*. Bruce has authored numerous White Papers and case studies on contact center topics, as well as being the principal investigator for BenchmarkPortal's benchmarking surveys and reports.

He is also head of the College of Call Center Excellence, which provides training curricula to contact center professionals at all levels through in-person, live-online and on-demand formats.

A dual national, Bruce has divided his career between North America and Europe and has fulfilled work assignments in Asia and Africa as well. He formerly worked in the finance sector with international commercial and investment banks, and also worked with the Bain & Co. management consulting group in Italy. While in Europe, Bruce was also a speaker and writer on business topics in English and Italian.

Bruce holds an A.B. degree from Harvard College, a J.D degree from Harvard Law School, and an MBA degree from Harvard Business School, where he also attended the HBS Entrepreneur's Tool Kit program.

Bruce can be reached at BruceBelfiore@BenchmarkPortal.com.

Jose (Joe) Perez



Jose (Joe) Perez, CCCM, CCCA has over 40 years of managing and operating support call centers nationally and internationally.

Mr. Perez spent several years managing the technical support/field operations group for Digital Equipment Corp. in San Diego (later acquired by HP) as well as directing the technical support group for three of the largest refineries in South America.

Prior to joining BenchmarkPortal, Mr. Perez was the Director of Operations, Technical Support Group, for a large communications company in NY and CT with a staff of over 900 customer services representatives.

As the Dean of BenchmarkPortal's College of Excellence and its Senior Instructor for over 11 years, Mr. Perez has developed and delivered the Call Center Management Certification course while demonstrating his effectiveness in training call center's staff in Strategic Planning, Data Analytics, Metrics, Quality Assurance and Workforce Management among other areas.

Currently, Mr. Perez is also a Certified Call Center Auditor, a Certified Call Center Manager and Senior Consultant for BenchmarkPortal.

Mr. Perez is fluent in English and Spanish.

Jose can be reached at: jperez@benchmarkportal.com

David Raia



David Raia is a Senior Research Analyst and metrics database manager for BenchmarkPortal. He is also a Senior Consultant and is highly regarded in the industry as a Contact Center Operations Improvement Specialist. He began his consulting career in 1995 and spent 15 years successfully driving a variety of complex Contact Center Optimization engagements for Fortune 500 companies and Government agencies in the United States and Canada. David manages BenchmarkPortal's industry-leading KPI database and has been responsible for the expansion of the database into multi-channel and omni-channel metrics. He is a thought-leader in KPI

analytics, gap analysis and ROI, as well as the impact of technology on performance metrics. His consulting areas of expertise include reporting and performance management, workforce optimization, process reengineering, quality assurance programs, contact management, agent and supervisor training, market segmentation, business process outsourcing and virtual consolidations. David has been a featured speaker on many of these topics at a variety of national Contact Center and Management Seminars.

David enjoyed a successful thirty-year career in the telecommunications industry, holding a variety of line and staff managerial positions in Sales, Service, Strategic Planning and Finance. In his last assignment, he was the General Manager for a 1,500-seat multichannel and multi-functional national sales and service assistance center. He was responsible for introducing a leading-edge *expert systems* knowledge and contact management platform to his organization that, with modifications, is still operating effectively today.

David can be reached at DavidRaia@BenchmarkPortal.com

Alan Pottkotter



Alan Pottkotter is the Chief Operating Officer for BenchmarkPortal. Within that role, he also is our Director of Marketing and Information Technology. He is responsible for database automation for BenchmarkPortal's large database of contact center metrics. He is also in charge of the design of all electronic reports for the company's benchmarking and other reports. Alan works with BenchmarkPortal's partners on all technology issues and assists clients with issues involving BenchmarkPortal's product delivery technology. He attended Santa Barbara City College for Computer Network Engineering.



Appendix D: Community Resources from BenchmarkPortal



1. BenchmarkPortal's Mission

At BenchmarkPortal, we believe every contact center professional can make a difference for each customer experience. Everything we do is about discovering and sharing better ways to optimize those experiences.

To fulfill this mission, we conduct original research on the contact center sector and offer a menu of products and services that have proven useful to managers around the world.

2. Contact Center Certification

The Center of Excellence recognition is one of the most prestigious awards in the customer service and support industry. The certification process is management's best path to a world class customer contact operation.

A contact center that has been certified as a Center of Excellence by BenchmarkPortal has met and/or surpassed rigorous standards of efficiency and effectiveness. This certification is unique in that its achievement is ascertained strictly "by the numbers." This means that the BenchmarkPortal team audits and verifies the center's key performance indicators and compares that data to data from other peer organizations. This is different from other types of contact center certifications that typically focus on less results-oriented measures, such as process handling methods and procedures.

3. Contact Center Benchmarking

Benchmarking is now recognized as an essential function for a properly managed customer contact center. The competitive insights and aids to decision-making that are offered through benchmarking are so compelling that managers cannot do without it and still consider themselves in line with professional standards.

In 1995, BenchmarkPortal's founders conducted the first scientific, industry-wide benchmark study at Purdue University, under a grant from IBM. ^[1] Now custodian of the world's largest and most respected database of contact center metrics, BenchmarkPortal uses this data to provide Contact Center managers with individualized reports. These reports provide managers the information to:

Compare their performance against an appropriate peer group of Contact Centers

- ✓ Make optimal, fact-based decisions regarding investment, personnel, procedures, etc.
- ✓ Formulate recommendations on how to improve their contact center



- ✓ Determine if they qualify for BenchmarkPortal's Contact Center of Excellence Certification

Through our reports, as well as our leading edge research, we aim to contribute to the continual improvement processes of individual customer Contact Centers, and ultimately to improve the performance of this vital sector as a whole, worldwide.

4. Contact Center Training

BenchmarkPortal manages The College of Contact Center Excellence (originally developed by us for AT&T) to offer training and certification for Managers, QA Managers, Workforce Managers, Supervisors, and Agents. The College of Contact Center Excellence offers one of the most highly sought-after Contact Center Training Certification programs in the world, led by the industry's top-rated instructors, and with over 150 years combined experience. These courses will equip you and your colleagues with the skill sets needed to improve your Contact Center's performance.

5. Contact Center Campus Week

BenchmarkPortal's Contact Center Campus week is an annual, unique industry event that presents an opportunity for attendees to get on the fast track to upgrade customer service and to drive their Contact Centers' performance to the top.



Industry experts, along with BenchmarkPortal's premier team of instructors, will lead and guide classes and group discussions that explore Contact Center challenges and emerging trends in the industry. Note: BenchmarkPortal expects to revive Contact Center Campus after the COVID-19 pandemic.

6. Contact Center Assessments and Customized Consulting

BenchmarkPortal will help your contact center balance customer expectations and financial objectives by identifying the metrics that will drive success. Our assessment process will make performance gaps more obvious and will help pinpoint the initiative that commits a minimum of resources to achieve the best performance results. Note that BenchmarkPortal also offers customized consulting on a range of contact center issues (IVR optimization, WFM, consolidation, multi-center organization, center reengineering, HR issues, training improvement, technology selection, outsourcer selection, etc.)

7. Industry Reports, White Papers, Research Reports

We have turned many of our best practice research initiatives into Industry Reports, White Papers and Books. BenchmarkPortal's Industry reports are the industry's richest source of Contact Center information. As the economy and business goals change, our reports can provide critical information that will ultimately affect your bottom line.

8. iBenchmark

iBenchmark automates the process of benchmarking, transforming a valuable but time-consuming, manual process into an automated, user-friendly service that allows managers to monitor performance on a monthly basis. Monitoring your Contact Center performance on a monthly basis will allow you to make decisions and select improvement initiatives that will have measurable impacts on the financial and operational performance of the contact center. iBenchmark thus represents a major step forward for Contact Center decision-makers.



9. CallTalk Online Radio Show

A fun and exciting on-line program for education and learning, featuring BenchmarkPortal's Bruce Belfiore interviewing managers and other thought leaders in the contact center industry. Broadcast monthly, directly over the Internet to your desktop, CallTalk covers informative and educational topics that impact today's Contact Center. CallTalk airs without the participation of vendors so that topics will be free from their influence and guided by the needs of its listeners. Interested parties can access the archive of programs by visiting the BenchmarkPortal website at www.BenchmarkPortal.com.



10. The Learning Channel

A resource of free video training geared toward agents, supervisors, managers, directors, or any contact center personnel, produced in short micro-learning segments of approximately 5 minutes long. This quick learning format makes it easy for you to provide training that works into any busy schedule and because they are short, provides better long-term results. These videos are constantly updated to meet the changing needs of our industry. Best of all they are free to use and share as you see fit by visiting the Learning Channel page on the BenchmarkPortal website at www.BenchmarkPortal.com.

