SUMMIT 08

MEASURING AND CONTINUOUSLY IMPROVING THE CONTACT CENTER

Reporting 101

Dennis Finn – Professional Services

RIGHT NOW.

AGENDA

- Contact Center Metrics and supporting reports
- Simple ideas for improving each Metric
- Underlying tables used in reporting
- Best practices for building custom reports
- Useful Reporting features – Building
- Useful Reporting features – Running/Analyzing
- Key Resources

CONTACT CENTER METRICS

- Self Service Rate
- First Contact Resolution Rate
- Average Response Time
- Average Resolution Time
- Cost per Incident – by channel
- Customer Satisfaction

FOR EACH METRIC

- Which Standard Report supports it
- Supporting measures and reports
- Underlying tables
- Ideas for improving

SELF-SERVICE RATE

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Session Activity Report

- Part of Site Effectiveness dashboard
- Uses session_summary Table

Activity	Count	Percent
View Answer	268	39.8 %
Search	87	12.9 %
Search & Answer	51	7.6 %
Submit Question	23	3.4 %
Self Service Rate	650	96.6 %
Sessions	673	0.0 %

- Measures percentage of total sessions that do not result in an Ask A Question submittal

IMPROVING SELF-SERVICE RATE

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- Maintain Relevant, Accurate, Complete, and Clear **Knowledgebase Content**
  - Keyword Search Report – ensure all keyword search terms have relevant KB content
  - Answers Viewed Report – review Answers with high hits for strength, low hits for weaknesses
  - Answer Feedback – review for clarifications or corrections needed to Answer content
  - Information Gap Report – use to add content to the Knowledgebase where there are gaps

FIRST CONTACT RESOLUTION RATE

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Agent Effectiveness Report

Agent	Assigned	Responses	Solved	RPA	FCRR
Jon Franklin	5	5	3	1.0	75.0%
Chloe Finnly	18	18	16	1.0	88.9%
Aidan Parker	48	51	47	1.1	91.7%
Martin Smith	66	73	62	1.1	95.3%
Mike Jones	4	5	4	1.3	75.0%
Simon Schmidt	67	73	63	1.1	86.6%

- Measures percentage of incidents that are Solved with the first response sent by the Agent
- Uses the Incident Performance Table

IMPROVING FCRR

- All Previous KB-centric improvements – Agents need a well maintained knowledgebase
- More training and coaching for lower performing Agents
- Best practice knowledge transfer from the higher performing Agents
- Grant agents authority to solve problems without escalation
- Improvement could come at the detriment of Average Resolution Time

AVERAGE RESPONSE TIME

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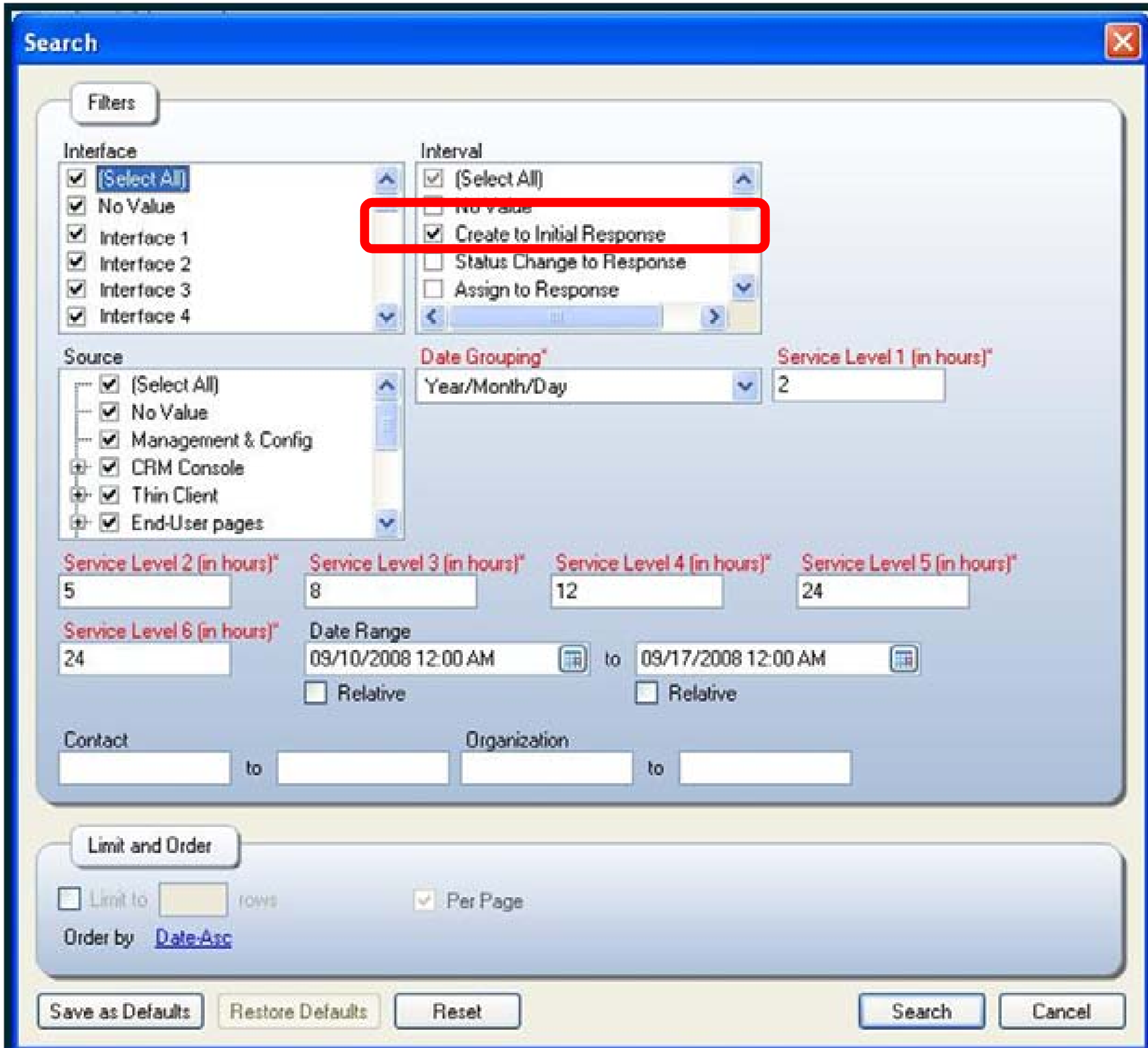
SL by Incidents (Rel) Report

Date	Incidents	Service Level 1	Service Level 2	Service Level 3	Service Level 4
2008/09/10	1332	41.5 %	4.4 %	7.1 %	3.2 %
2008/09/11	1214	47.9 %	4.0 %	4.6 %	7.5 %
2008/09/12	1130	53.7 %	3.7 %	7.1 %	5.7 %
2008/09/13	420	78.8 %	1.2 %	3.3 %	15.0 %
2008/09/14	324	64.5 %	1.9 %	3.4 %	22.5 %
2008/09/15	860	79.0 %	3.8 %	3.3 %	11.9 %

- Measures percentage of incidents where the interval type selected meets the service level (in hours) selected

SL BY INCIDENTS (REL) REPORT



AVERAGE RESOLUTION TIME

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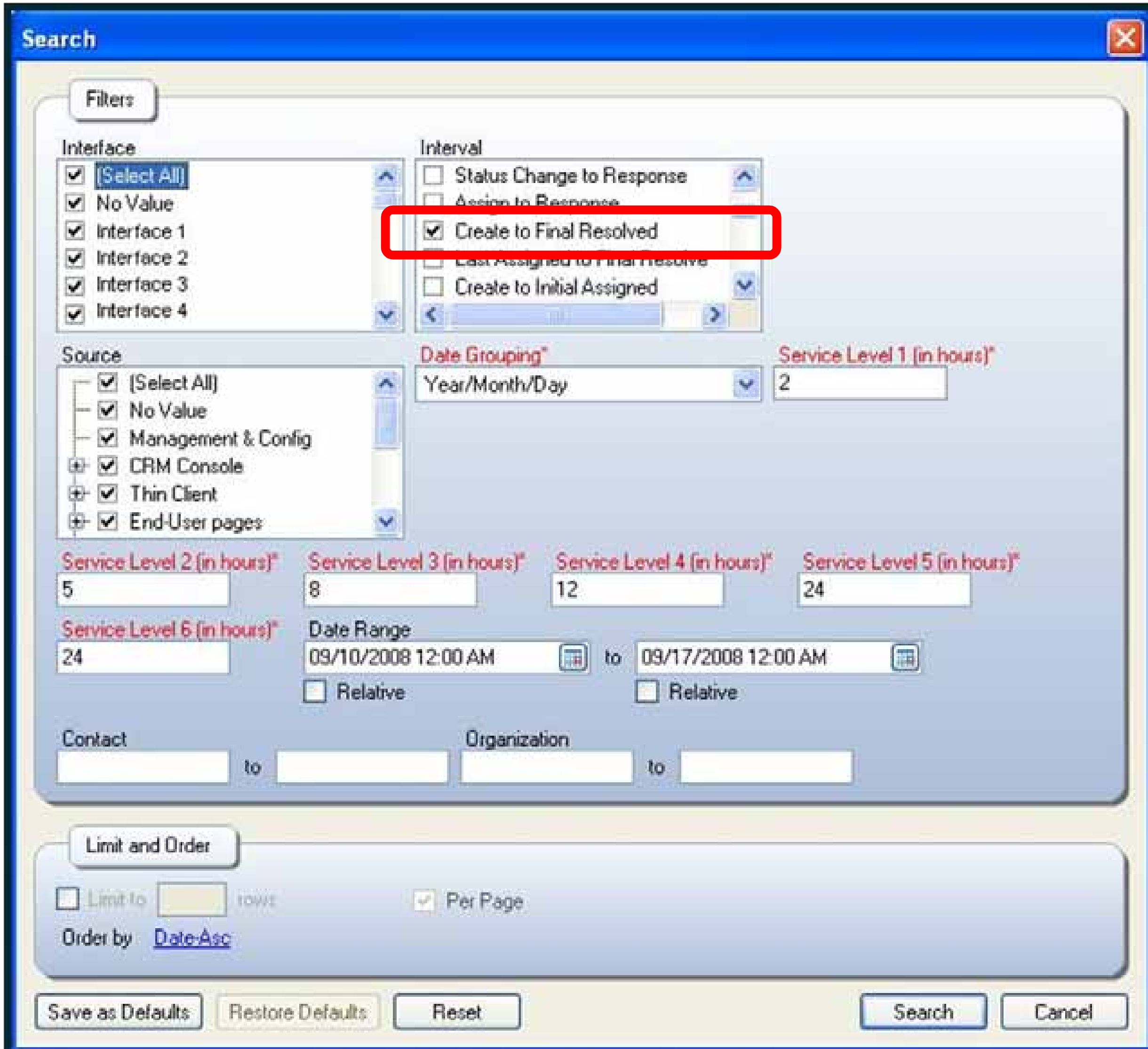

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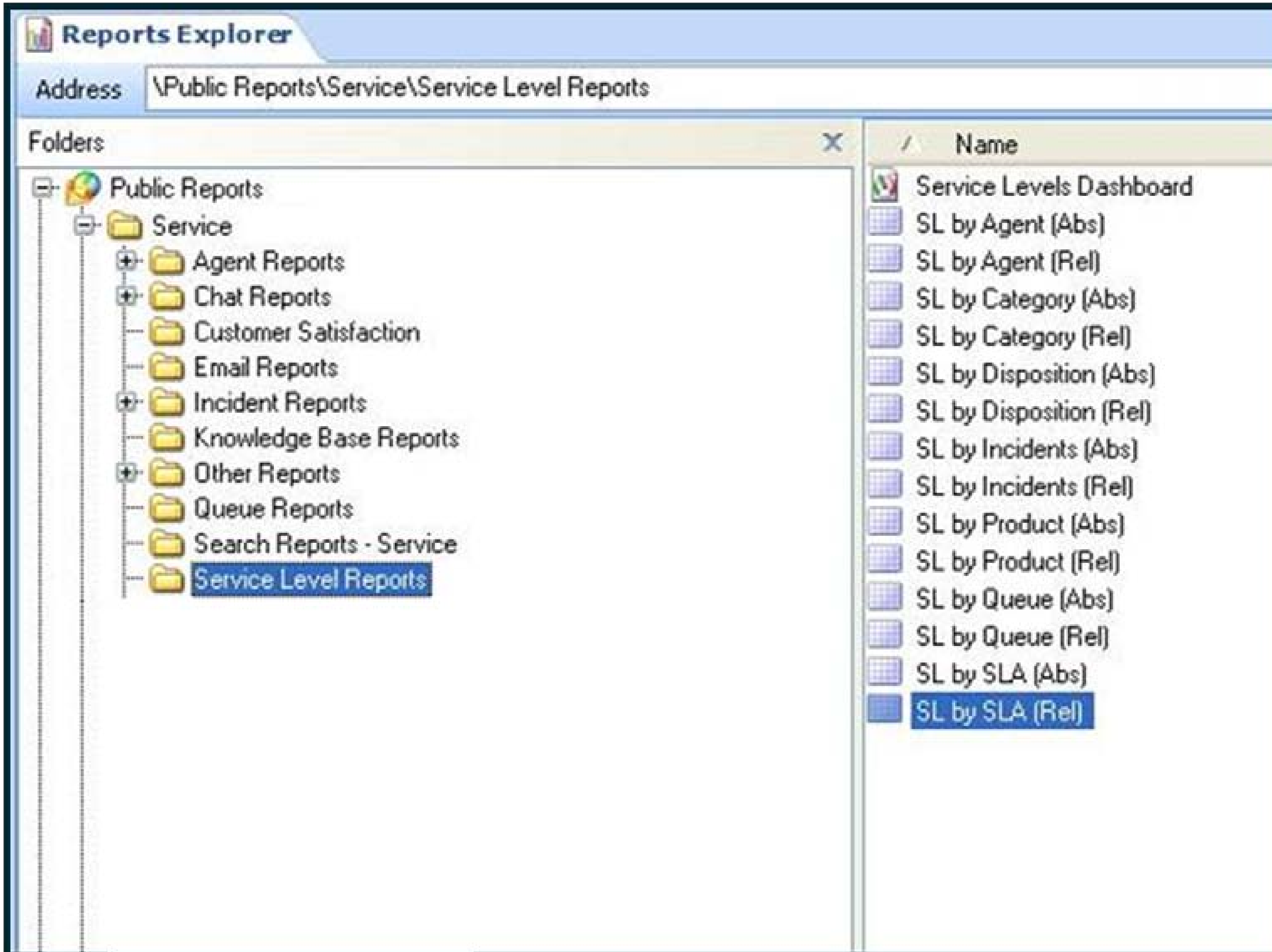
ADDITIONAL SERVICE LEVEL REPORTS



IMPROVING RESPONSE AND RESOLUTION TIMES

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- Use detailed SL reports to understand and target weaker areas
- Manage overall Staffing levels
- Manage Agent Scheduling to coincide with volume patterns
- Incentives for meeting and beating
- Publicly post weekly, monthly trends

COSTS PER INCIDENT BY CHANNEL

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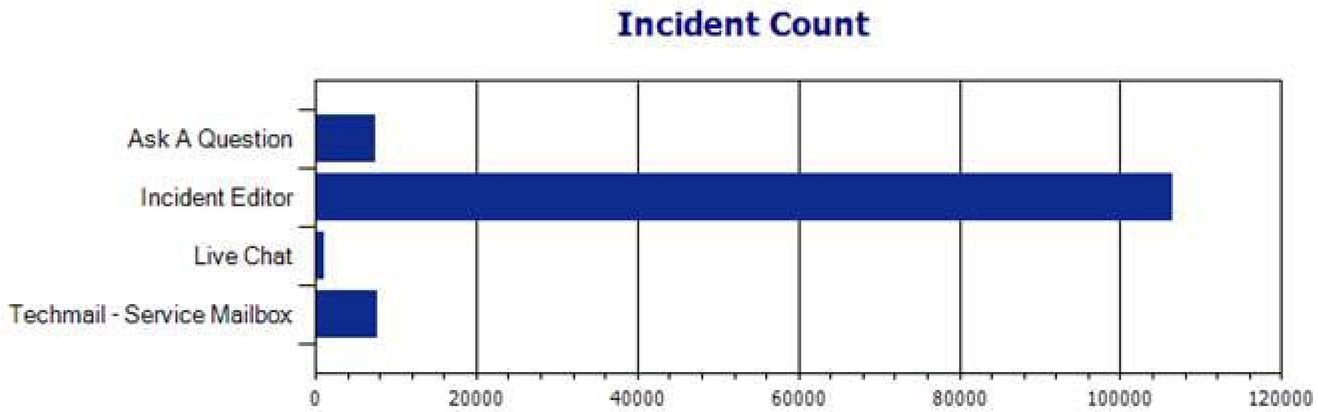
Incidents Created by Source Report



Source	Interval	Incidents
Ask A Question	2008/09	7593
Incident Editor	2008/09	106417
Live Chat	2008/09	1028
Techmail - Service Mailbox	2008/09	7621
Total		**122659**

CUSTOMER SATISFACTION

- Define a small number of key questions
  - *How satisfied were you with your overall experience?*
- Define a consistent numerical score for it
- Use RightNow Feedback Surveys to gather the data
- Use Question Responses table for reporting
- Understand that Customer Sat is tightly related to each of the other metrics

ADDITIONAL DELIVERED REPORTS

- Over 600 Delivered Reports across all applications
- They're outlined and described in the Standard Reports Manual for each release – Library
- Can I get by on just the Delivered Reports?

BEYOND DELIVERED REPORTS

- 3 Sources for your RightNow Reporting
  - Delivered vanilla reports
  - Custom Reports: from Delivered reports that you've cloned and changed
  - Custom Reports: built from Scratch

KEY ROLES RELATED TO REPORTING

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Application User
Runs and uses Reports
Uses Run-time formatting
Requests Reports

Power User
Runs and uses Reports
Mastered Run-time formatting
Creates New Custom Reports
Change Existing Reports

Analytics

Reporting Specialist
Designs, Develops, Tests, and Deploys Custom Reports

Your RNT Administrator
Often acts as a Reporting Specialist

Training strongly recommended

KNOWLEDGE NEEDED FOR CONTACT CENTER REPORTING

Data – where it's stored and how it's organized

Tool - Dev – how to use the tool to clone/create/change/maintain reports

Tool - Runtime – how to manipulate and format resulting report data

DATA DICTIONARY - DIRECT

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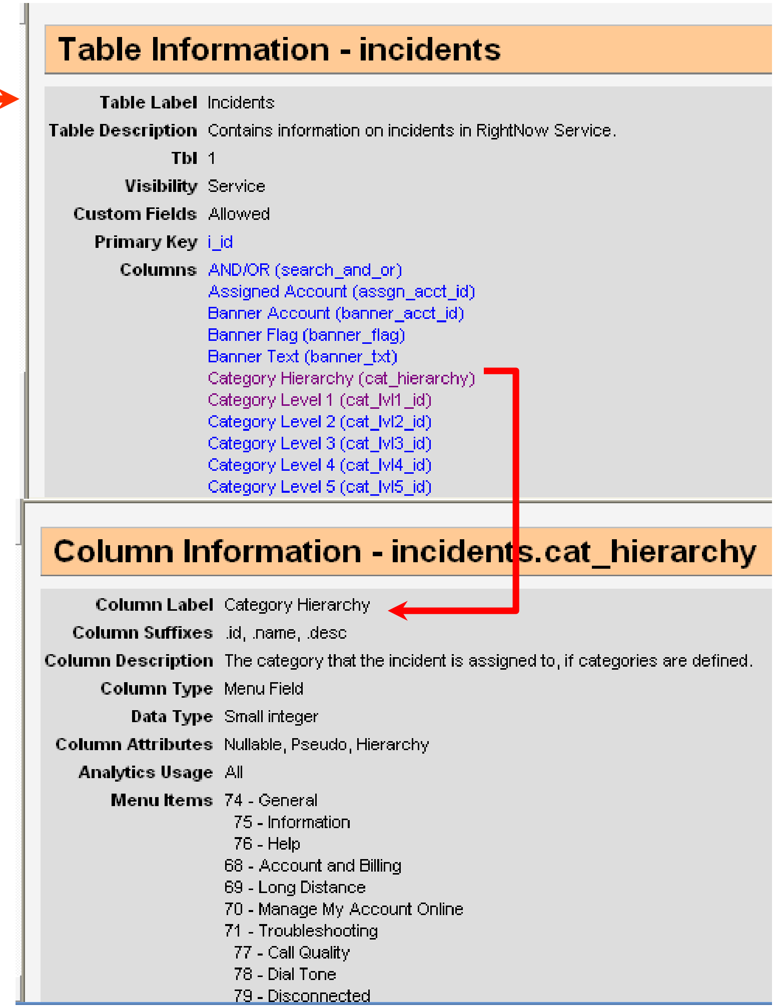

DATA DICTIONARY – FROM ANALYTICS

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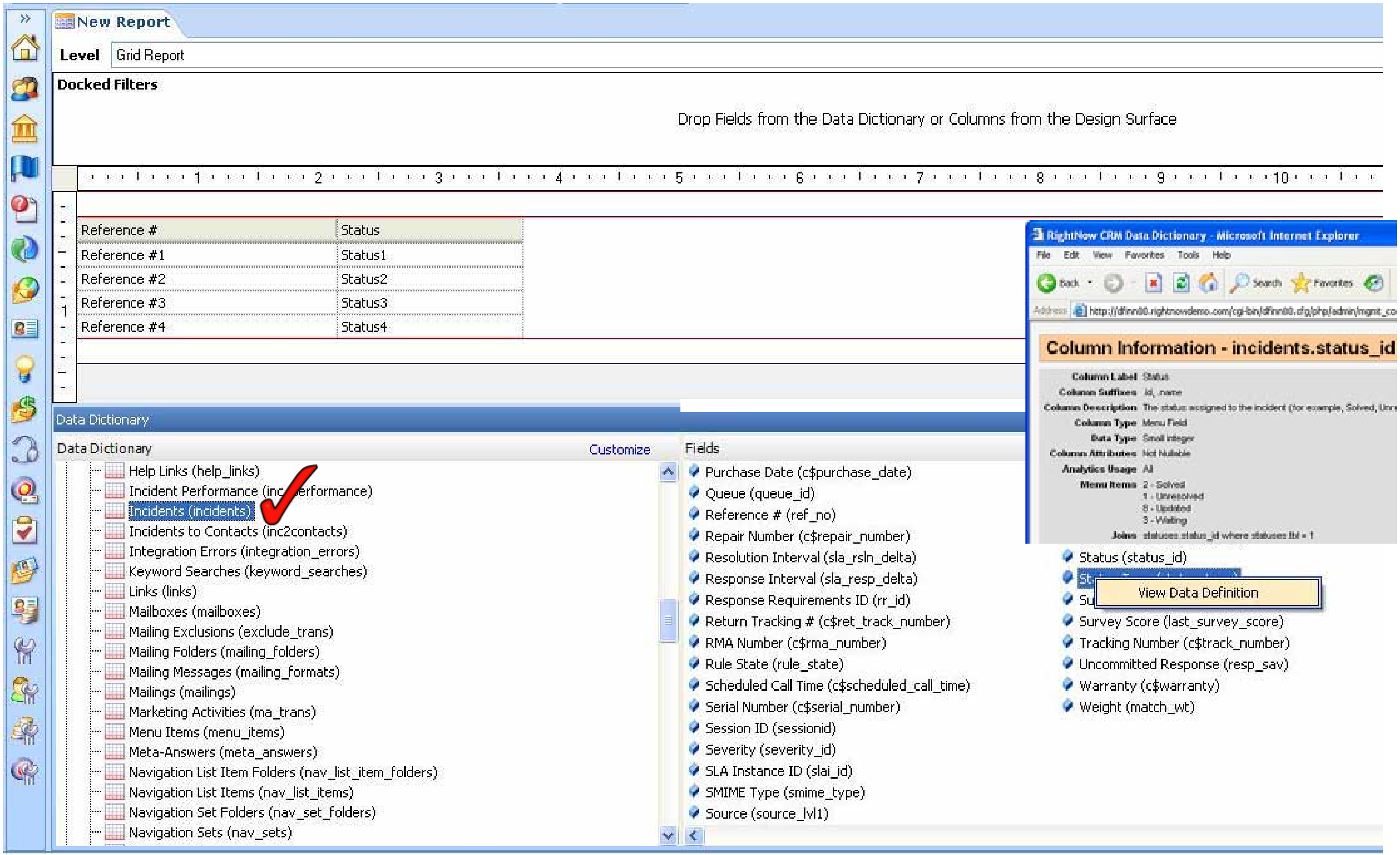

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8 KEY TABLES

- Accounts
- Contacts
- Incidents
- Answers
- Threads
- Incident Performance
- Transactions
- User Transactions

KEY TABLES – INCIDENT-CENTRIC

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Contacts

Row for each Customer; Name, Email Address…

****Incidents****

Row for each Incident; Refno, Assigned to Subject, Status, Prod/Cat

Staff Accounts

Row for each user; Name, Group, Profile…

Threads

Row for each thread entry; Notes, responses, Customer entries…

Inc Performance *

Amount of time – By Interval Type:
Created to Response
Assigned to Response
Response to Resolved

Transactions

Action-based; Creates, Assignments, Responses, Forwards

User Transactions

Amount of time- Logged in, Performing Edits, Viewing

* Cached
* Relative Time

INCIDENT PERFORMANCE INTERVALS

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- Incident Performance Table tracks how long it takes in both absolute *and relative time* for Incidents to go through these intervals:

1 - Create to Initial Response
2 - Status Change to Response
3 - Assign to Response
4 - Create to Final Resolved
5 - Last Assigned to Final Resolve
6 - Create to Initial Assigned
7 - Create to Initial Resolved
8 - Assigned to Reassigned
9 - Status Change to Reassigned
10 - Queued to De-queued
11 - Queued to Initial Assigned
12 - Queued to Initial Response
13 - Queued to Initial Resolved
14 - Backlog
15 - Incident Edit
16 - Servicing
17 - Initial Response to Initial Resolved
18 - Queue Initial Response to Initial Resolved
19 - Final Waiting to Final Resolved

KEY TABLES – ANSWER-CENTRIC

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Contacts

Row for each Customer; Name, Email Address…

****Answers****

Row for each Answer; Answer ID, Summary, Assigned to Answer Content Status

Staff Accounts

Row for each user; Name, Group, Profile…

Clicktrack

Which Contacts have viewed which Answers

Answer Stats

Answer Hits and Ratings

Transactions

Action-based; Creates, Assignments, Edits

User Transactions

Amount of time-Logged in, Performing Edits, Viewing

THE CUSTOM REPORTING LIFECYCLE

Requirements

Get Request
Gather Rqmnts

Design

Sketch Mockup
Determine Data
Determine Type
Review Existing

Build

Build Report
Build Schedule

Test

Unit Test
User Accpt Test

Deploy

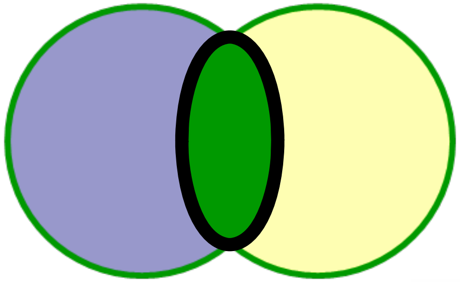
Grant Access
Placement

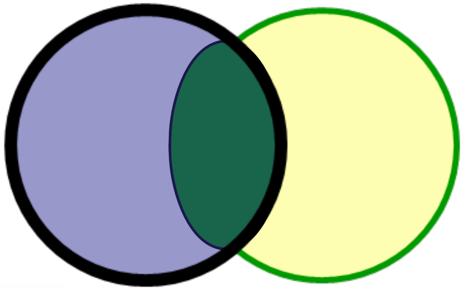
Create a Mock-up of the report

	A	B	C	D	E	F	G
1							
2		**Weekly Agent Productivity**			**Filters**:		
3					Assigned Group		
4					Date Range – Created		
5		Agent	Incidents Solved	Avg Response Time	Status - Solved		
6							
7		Bob	250	5hrs32min			
8		Mary	175	6hrs11min			
9		Tom	225	4hrs18min			
10		Jill	325	5hrs48min			
11							
12		Total	975				
13		Average	269	5hrs12min			
14							
15							
16		RefNum	Subject	Customer Name	Date Created		
17		070827-00098	Is it possible for	John Jones	27-Aug		
18		070827-00099	How can my orde	Sue Miller	15-Aug		
19		more listing...					
20							
21		Record Count: 325					
22							

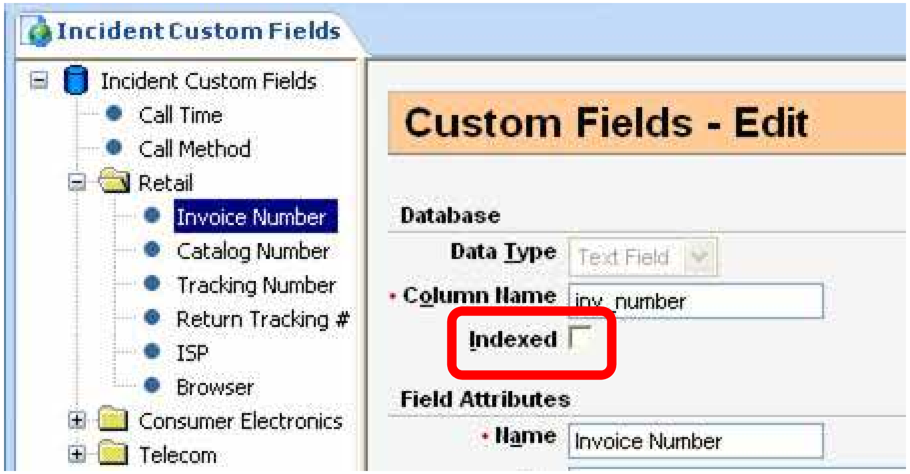
BUILD THE REPORT

- Start simple and easy, one table, a few output fields, and a key filter
- Preview, tweak, Preview, repeat
- Add formatting, subtotals, charts, extra components after you get the core report working
- Understand join types and ensure you have them set correctly: Inner vs Outer





- If the data will result in the same set, use Inner Joins instead of Outer Joins
- Use as few tables as possible
- Apply Indexes for frequently reported upon custom fields:



DESIGN AND BUILD CONSIDERATIONS

- When you have a choice between making a filter ‘fixed’ or ‘selectable’, make it fixed
- There are 3 Levels of Filters: Report, Node, and Group. Set filters at the highest level possible.
- Set default values for selectable filters
- When counting records with a function, use the syntax - count(1), rather than count(*) or count (incidents.refno)

BUILD THE SCHEDULE

R D B T D

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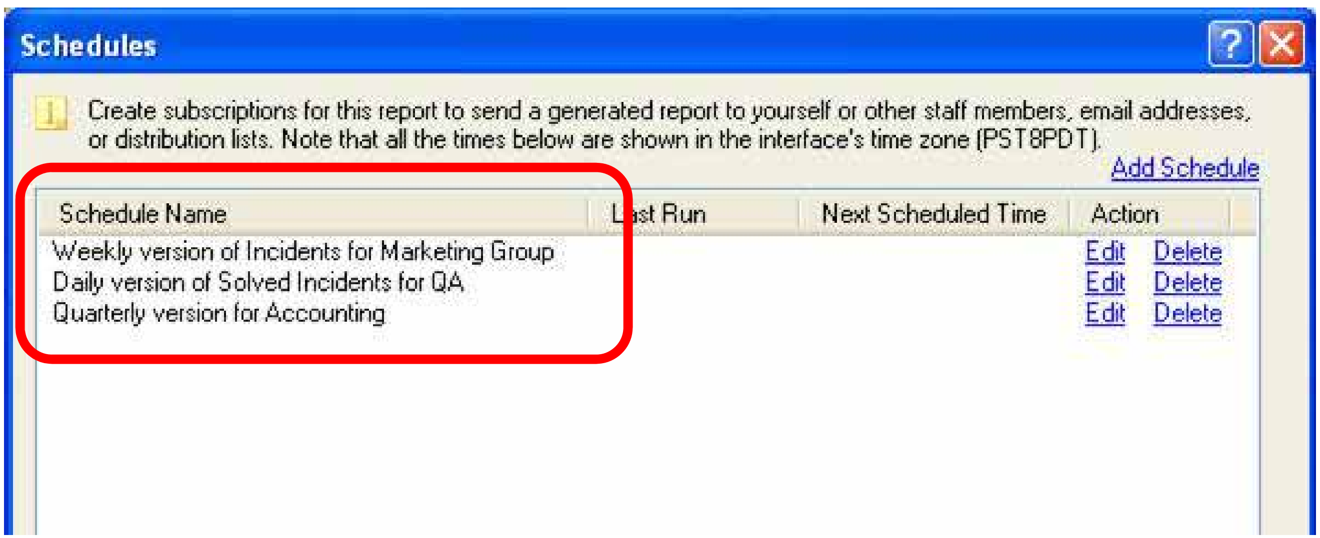
- Schedules are optional
- Take advantage of the ability to apply multiple schedules to the same report:



8 KEY FEATURES TO KNOW ABOUT AND LEARN

- Cross-Tab Reports
- Recursive Drilldown
- Group Date
- Dashboards
- Docked Filters
- In-Line Editing
- Reports about Reports
- Exporting report definitions

8 KEY RUN-TIME FEATURES FOR USERS

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- Sorting
- Rollups
- Slicing
- Auto-Filter
- Filtering and Row Limits
- Displaying Search Criteria
- Exporting results
- Publishing

8 KEY RESOURCES FOR BECOMING A REPORTING STAR

Resource:	**Location:**
Analytics Manual	Customer Community/Library
Standard Reports	Customer Community/Library
Data Dictionary	Common Config/DB Admin/Data Dictionary
Knowledgebase	Customer Community/Support
Customer Forum	Customer Community/Forum
Online Learning Ctr	Customer Community/Education & Training
Classroom Training	Customer Community/Education & Training
Time with the Tool	*You and your computer*

ADDITIONAL RESOURCES FOR DEEPER HELP

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- Onsite custom training – your data, your environment, your requirements
- Outsourced Administration (OSA) support, your OSA Analyst can build reports for you
- Offsite custom report development through RightNow's Reporting Center of Excellence
- Ask the Experts session during this conference

QUESTIONS AND DISCUSSION

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- Questions
- Comments
- Additional Best Practice Ideas to share