



visualaffinity | Metrics Management for the Contact Centre

About visualmetrics

visualmetrics is a Business Intelligence (BI) solutions provider that develops and delivers best of breed Analytical Applications, utilising BI tools, to its focus markets. Based in Chester, with an annual turnover approaching €4 million, visualmetrics also offers consultancy services to construct custom applications tailored to a client's specific requirements.

visualmetrics has developed specialist project methodologies for the delivery of its solutions - **DRIVE** for custom Analytical Applications and an accelerated form, **@DRIVE**, for standard applications. These services span the full application life cycle from functional specification to application support and enhancement, ensuring that project risk is managed and ROI is maximised.

visualmetrics maintains partnerships with leading product, application and service partners in the BI market. visualmetrics sees its value not only in assisting its customers to exploit data as information on which to base decisions, but as intelligence to promote insight into businesses performance.

Our clients include market leaders such as DHL, Unipart, Balfour Beatty Utilities, Places for People, Travelex and CIPD.

visualmetrics has developed a suite of Analytical Applications, based on their length and breadth of industry and technical experience.

- visualaffinity for contact centres
- visualperformance for sales
- visuallogistics for logistics
- visualrevenue for finance
- visualintellect for human resources
- visualavenue for property portfolio management
- visualintegrator the engine to automate the data delivery

Executive Summary

visualaffinity gives contact centre operations and general business managers an insight into the effectiveness of their organisations by representing KPIs in terms of **financial, performance & productivity metrics**. This is achieved through a suite of analytical applications integrated with the multi-media ACD, CRM, Financial and other operational systems. This application is delivered using dashboard, exception-based highlighting, and alerts which give real-time response to business critical situations.

visualmetrics has also developed a rapid implementation process, **@DRIVE**, which de-risks the solution and enables a fast Return on Investment (**ROI**). This application can be deployed within your own organisation or extended into your own business supply chain, to enable closer collaboration with both suppliers and clients, through a secure environment. Ultimately, providing your business with **'exceptional answers are given to critical questions of contact centre performance'**.

Whether you are sales, customer service, or operationally focussed, **visualaffinity** will empower your business to optimise its contact centre operation.

Business and Operational Scenario

Contact Centres present a high value, potentially low cost service to both Sales & Customer Service aspects of a business. This is critical to financial success. Get it right and customer satisfaction, loyalty, retention and business success can follow. Getting it wrong is not an option, as sales costs escalate, customer satisfaction degrades, and financial performance is impacted.

The planning of people resources, and linking them with operational and management goals are key to ensuring the contact centre is effective.

In today's world of multi-media customer communications, contact centres are a primary channel for sales and customer service. Because multiple contact centres are geographically spread, there is a need for consolidation of information to manage individual and collective contact centre performance. Specifically, operational productivity and efficiency are critical to the success of the business.

The KPIs which will drive improved business performance are based on:

- **Financial Analysis**
- **Contact Centre Performance**
- **Agent Productivity**

As a result of the dependency of the Contact Centre on employee costs and productivity, which typically equates to 80% of the overall costs, understanding the effectiveness of personnel is a KPI to success. However, data integration from the separate operational sources is an IT challenge which is perceived to be a constraint in the delivery of what is required to drive optimal operational performance out of the Contact Centre. The challenge is to capture this data seamlessly,

without impact on the performance of operational systems, organise it and present it in meaningful terms to different functional users and to do so in a time frame which can be used effectively.

- **What is my average speed to answer in the contact centre against plan?**
- **What is my "One and Done" rate by agent and agent group?**
- **How profitable are my sales campaigns by region or time?**
- **How have we performed on service level by product, agent and agent group?**
- **How does product or contract margin impact on the overall financial performance?**
- **How do support service revenues impact on the overall financial performance?**

Whether you are sales driven or customer service based contact centre, **visualaffinity** will empower your business to optimise its operational performance.

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Application Overview

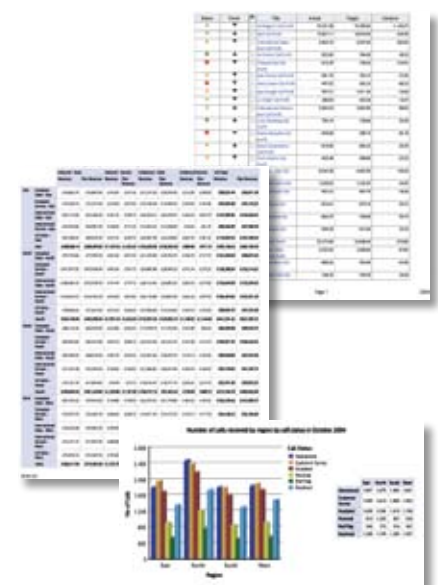
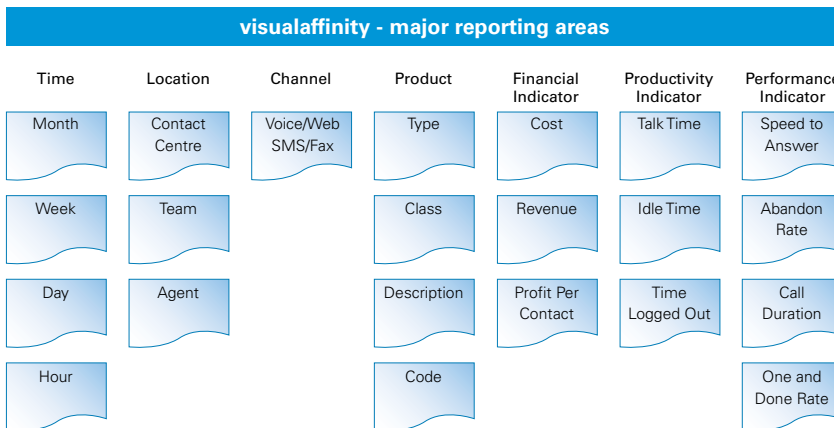
visualaffinity is a graphical and tabular analytical application which brings together financial and operational information from different sources, to give operational, sales & marketing and financial managers an intelligent view on contact centre performance. Through **visualaffinity**, trends and patterns which are part of the KPIs, are made visually apparent to the user community.

visualaffinity is designed to meet both the business & IT challenges, utilising business intelligence software to provide insight into evaluating the operational success of the Contact Centre. It answers a range of questions which will show how these operational activities impact on the overall business performance, including:

- **Financial Metrics:** Cost, Revenue, & Profit per contact, along with Sales Conversion Rates
- **Performance Metrics:** Speed to Answer, Abandon Rates, Call Duration, & 'One and Done'
- **Productivity Metrics:** Agent Hourly Productivity, Talk Time, Idle Time, & Logged Out Time.

It does this by building a data warehouse across the systems that feed in data. Typically these systems include ACD, Workforce Management, GL accounting, CRM, and sales order processing systems. **visualaffinity** is designed with a loosely coupled architecture that permits the data extraction, loading and transformation routines to be efficiently integrated to the operational systems databases without the need for customer specific change to the **visualaffinity** data warehouse.

The data feeds selectively import, cleanse and organise data before updating the data warehouse, while the analytical application through which the data is viewed is refreshed from the data warehouse. Exceptional conditions can be pro-actively alerted within the application, sending an electronic communication to relevant parties via several electronic devices, SMS, Pager, Email, etc.



Features and Benefits

visualaffinity offers operational, commercial and financial managers a set of business views and standard reports, in a user configurable environment. Data is organised by subject area making user reporting easier and key data is extracted and made available to the user without the need to understand file names and structures **visualaffinity** is based on three application areas. The Performance application relates to information on contact centre efficiency, and has standard reports which include:

- inbound call volumes
- IP network InterQueue
- "1 and done" rate
- outbound call volumes
- speed to answer
- Trunk activity
- DNIS distribution
- average call duration
- abandoned call rate

The Productivity application focuses on presenting information that shows the effectiveness of contact centre methods. Trends over time can be viewed and comparisons made between different teams, applications and contact centres.

- agent/team productivity
- application productivity by application
- talk time
- transfer in/out
- agent/team productivity
- wrap time
- offline data entry
- idle time
- logged out

By analysing contact centre Performance and Productivity information in relation to costs, a perspective on the financial operating performance of the contract centre emerges in the Financial application, and has standard reports which include:

- cost per contact
- contribution per contact
- sales conversion rates
- revenue per contact
- revenue per application
- operating profit per application

visualaffinity is primarily focused on these application areas measuring overall contact centre operating performance. The **visualaffinity** architecture is able to integrate other relevant data feeds to give an insight into how the contact centre brings value to the overall business operation. This offers the opportunity to construct a **Business Effectiveness** application. While the measures analysed and reported are customer specific, examples include:

- impact on profit of specific sales and marketing campaigns
- new business won through specific sales and marketing campaigns
- leveraged business from existing customers base won through specific sales and marketing campaigns
- impact on maintenance cost through pro-active predictive failure alerting
- impact on contact centre performance of training and development programs

Moving from traditional static reporting to intuitive and visual displays, assists contact centre managers in addressing their operational goals, allowing them to:

- retain and reward the best agents
- identify those who need further training to become more effective
- monitor agent and team performance across time
- gain a view of an application in operation across multiple contact centres
- monitor customer activity over multiple channels; e-mail, web and telephone
- enable decision making based on up to the minute information

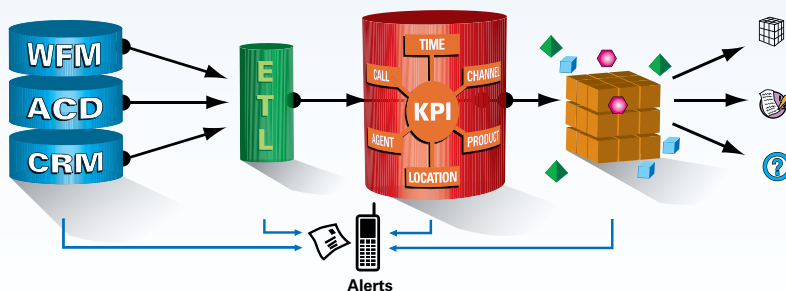
Those responsible for managing the direction and health of the business benefit also, by allowing them to:

- have cause and effect comparisons between plan and outcome giving insight into business dynamics, both problematical and beneficial
- view critical KPIs in a visual way
- operate from one version of the truth
- identify the effectiveness of business activities at all levels of management
- report to different management levels at the appropriate level of detail
- deliver a fast implementation enabling fast return on investment
- automate the delivery of timely, relevant and accurate information

Technical Architecture **visualaffinity** is built from a number of technical components.

visualaffinity, is built from a number of technical components with financial data being captured from the underlying operational GL system, and other associated financial applications, such as budgeting.

A suite of software programmes which **visualmetrics** term the **Information Supply Chain** extracts transforms and aggregates the data from the underlying operational systems into a data warehouse. Dependent upon the database technology chosen the **Information Supply Chain** will apply either Data Transformation Services (DTS) for Microsoft SQL/Server for loading into Microsoft SQL/Server database environment, or alternatively PL/SQL and SQL+ into an Oracle environment. The frequency of these data refreshes can be determined by business demand, and can operate in a real time environment, if required.



Analytical Reporting

Managed Reports

Interrogation

The extraction, transformation and load mechanism that refreshes the data warehouse is designed to work within the constraints of the operation of the underlying applications. As overnight batch processes often consume large amounts of processing time the **Information Supply Chain** uses a 'smash and grab' feature to reduce the impact on the batch schedule by minimising the data extraction time. It does so by performing an optimised extraction to a **work in progress** staging area. Once complete the operational systems are released and the **Information Supply Chain** continues by aggregating and populating the data warehouse from the **work in progress** staging area.

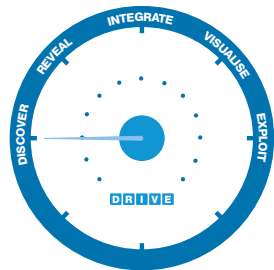
visualaffinity also offers a choice of either Business Objects or Cognos technologies for the analytical application. **visualaffinity** is maintained

to be compliant with latest versions of Business Objects and Cognos software toolsets and operates in both client server and web environments. Business Objects and Cognos are widely recognised as authors of the best of breed software tools in the Business Intelligence (BI) sector.

Security features cover report distribution and user class based access. Alerts indicating exceptional conditions can be pro-actively triggered within the application, sending an electronic communication to relevant parties via several devices including SMS, Pager, Email, etc. The most efficient report distribution strategy is determined as part of the **@DRIVE** implementation process, utilizing the functionality of the BI toolset.

DRIVE Implementation Methodology

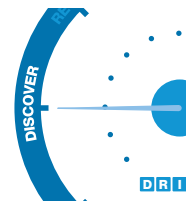
A customer chooses a standard application because it brings the benefit of a tried and tested solution, reduced project risk, and a lower product and implementation cost. This results in faster exploitation of value and stronger ROI to the business.



While a standard Analytical Application removes the traditional need for highly detailed functional analysis, it does not take away the key need of ensuring that the solution is implemented in such a way that it properly supports the business process. As the standard Analytical Application may not exactly fit the detailed needs of the customer, there may be a need to modify functionality to meet individual businesses' operational needs.

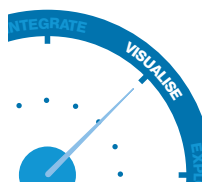
With this in mind **visualmetrics** developed an accelerated form of its **DRIVE** project methodology to implement standard Analytical Applications. We call this **@DRIVE** (Discover Reveal Integrate Visualise Exploit).

The objective of the **Discover** phase is to uncover the changes needed to achieve a full alignment of the Analytical Application with the customers' Methods. This includes any organisational and process changes the customer needs to consider as well as functional and technical modifications needed to the standard Analytical Application. The analysis will include functions across the business which contribute to, or benefit from the solution. This is a customer dependant process, driven by **visualmetrics** with assistance from the client.



In the **Reveal** phase, documented functional and technical modifications are fed back to the customer. Through this, an optimum solution is identified, and a list of organisational, functional and technical application changes are defined and agreed. Responsibilities, sponsorship and commitments are understood, and the project is launched from feasibility into execution. This activity is jointly carried out by the customer and **visualmetrics**.

Having understood fully how the organisation can make best use of the technology investment, the next task is to **Integrate** the Analytical Application with the existing operational applications and configure it for best use. This work, which includes engineering any programming modifications, is delivered almost exclusively by **visualmetrics**. Through this we automate the delivery of information into the Analytical Application from the operational applications, a process we call the Information Supply Chain.



Training and roll-out of the Analytical Application to the users takes place during the **Visualise** phase. It is now that the information delivered by the solution becomes visible to the broad base of users for the first time. **visualmetrics** assists the customer's internal project team during this phase to ensure maximum knowledge transfer.

Exploit is the post implementation phase where benefit and value is driven out of the solution. It is a process primarily run by the customer's project team as it seeks to ensure that the targets set, which have been set, are achieved, and ROI realised. **visualmetrics** acts in a secondary reference and support role as the Analytical Application beds in, and familiarity with it grows.



To derive benefit from the investment, the focus of the implementation must be on ensuring full alignment of the application to the improved business process. **DRIVE** is first and foremost about business process improvement. It is more than solely a technical implementation. While the scope of **DRIVE** is focused on fast and cost effective support from project initiation to implementation, at **visualmetrics** we recognise that Methods inevitably change over time as market conditions and internal procedures change. As new methods diverge from the initial configuration of the application, degradation of benefits takes place. We therefore complement the **DRIVE** service with the **visualsupport** service which maintains the maximum business benefit over the lifetime of the application.

visualmetrics Glossary

Analytical Application: a pre-built application using a BI toolset and based upon a domain of data, which allows an organisation to track, monitor and effect business performance through analysis of its Metrics.

Business Intelligence (BI): software tools from companies such as Cognos and Business Objects which are employed in the overall delivery of CPM based solutions and Analytical Applications.

Corporate Performance Management (CPM): the process of understanding and effecting the quality of an organisation's performance, based upon the interplay of BI, Metrics and Methods (also otherwise known as BPM: Business Performance Management or EPM: Enterprise Performance Management).

Data Warehouse: an off line database, which retains all the aggregated and restructured data that delivers the CPM solution through an Analytical Application.

Information Supply Chain: a suite of software programmes which automates the time based and selective extraction, transformation and loading of relevant data for reporting purposes, into the Data Warehouse.

Methods: the process that an organisation employs to fulfil its operational activity. When qualified by Metrics and reported via a BI tool set the results are used to meet CPM objectives.

Metrics: business measures which are quantifiable, including their associated business rules, (also otherwise known as KPIs: Key Performance Indicators).

Reporting: a broadly generic term which includes Business Intelligence, Analytical Applications, Business Performance Management and Key Performance Indicators.

Balanced Scorecard: a management system that enables organisations to clarify their vision and strategy and translate them into action. It provides feedback around both the internal business processes and external outcomes in order to continuously improve strategic performance and results. It retains traditional financial measures to assist in creating future value through investment in customers, suppliers, employees, processes, technology, and innovation.