



# How best-in-class contact centers approach quality and planning

Contact center discussion series



Tim Montgomery, Founder, Alamo Solutions

Webinar



# Overview of the UCRC



The Utility Customer Research Consortium (UCRC) is a blue-ribbon panel of executives working together to identify opportunities for improvement and innovation in customer service and care. UCRC members represent large energy utilities and leading vendors from across the US. The current membership represents over 70 million customers.

The UCRC emphasizes peer-to-peer interaction and information sharing. The members meet annually to consider customer-facing challenges and opportunities, and to plan the UCRC research agenda. In addition, they interact regularly through online “spotlight” calls to investigate emerging customer-facing issues and solutions. Finally, the UCRC is committed to working with the members to conduct collaborative research and consumer surveys, and to develop other content to enrich the dialogue among members and to provide thought leadership in the utility sector.

The UCRC focuses on short-term tactical and operational challenges and develops a forward-looking strategic vision for future customer experience and engagement.

# Tim Montgomery, Founder, Alamo Solutions



Tim Montgomery is a 30-year contact center veteran who has advised some of the most recognized brands in the world such as Coca-Cola, USAA, Dell, Allstate, and many other Fortune 500 companies.

Thirteen years ago, when call center cloud technology was in its infancy, he started the first 100% cloud-based BPO contact center, Culture, Service, Growth (CSG). In five years, CSG grew to nearly 1,000 employees and supported eight Fortune 500 companies. Along the way, he started two call-center, cloud-focused technology companies that he maintains today.

In 2016, Tim sold CSG to international outsourcer Qualfon. He has since helped companies of all sizes and industries move their call centers to leading-edge cloud technologies.

# A few of the companies Tim has worked with





# Quality programs' impact on culture





“

World class is NOT  
something you  
deliver; it is a  
**RESULT** of  
something you are.

—*John DiJulius*

”

# Quality is a process not a form





# Best-in-class quality assurance (QA) examples

Quality is viewed as something that is *for* agents, not something done *to* agents

- Goal is to help agents get better
- Scores are indicators of behaviors ... conversations focused on behaviors
- Quality and getting better are 100% within the agent's control
- Coaching conversation, not form conversations



# Best-in-class QA examples



## Challenging conventional call center QA processes

- Why scores if it's about getting better?
- Moving to the aisle versus the room
- Not everyone has to be treated the same
- Letting reps calibrate on a regular basis
- Agents come prepared with good and bad, not just four calls

# Best-in-class QA examples



## Respecting the program

- As important as a break schedule
- Weekly conversations about getting better
- End all team meetings by listening to a great call
- Call-of-the-month celebrations and rewards
- Agents working on one or two things to improve every week
- All levels listen to a call every week—background office noise

# Best-in-class QA examples



## Quick wins and considerations

- Avoidable contact teams
- Connect survey to agents and QA reviews
- Not everyone has to be treated the same
- Meet to discuss the “why” behind the program
- Peer monitoring
- Database of great calls



# Workforce management programs impact on culture



# Best-in-class workforce management (WFM) examples



Area	Average Salary	Hourly Rate (Loaded @ 40%)	Average Number Required Per Agent	Equivalent Cost per CSR Agent Hour*
Supervisor	\$ 55,000	\$ 37.02	15	\$2.47
Assistant Supervisor	\$ 45,000	\$ 30.29	15	\$2.02
Team Lead	\$ 40,000	\$ 26.92	15	\$1.79
Senior Manager	\$ 85,000	\$ 57.21	100	\$0.57
Director	\$ 122,000	\$ 82.12	250	\$0.33
Executive Support (VP)	\$ 250,000	\$ 168.27	900	\$0.34
Quality Manager	\$ 65,000	\$ 43.75	150	\$0.29
Quality Analyst	\$ 35,000	\$ 23.56	100	\$0.24
Training Manager	\$ 65,000	\$ 43.75	900	\$0.09
Trainer	\$ 35,000	\$ 23.56	75	\$0.31
WFM Manager	\$ 75,000	\$ 50.48	900	\$0.10
WFM Analyst	\$ 38,000	\$ 25.58	100	\$0.26
Reporting/Analytics	\$ 34,000	\$ 22.88	100	\$0.23
Call Center HR Recruiter	\$ 50,000	\$ 33.65	150	\$0.22
Call Center HR Generalist	\$ 45,000	\$ 30.29	150	\$0.20
IT - Telecom and Desktop Analyst	\$ 65,000	\$ 43.75	200	\$0.22
IT - Telecom Manager	\$ 125,000	\$ 84.13	900	\$0.17
IT - Telecom Programmer	\$ 85,000	\$ 57.21	200	\$0.29
<b>Total</b>				<b>\$10.13</b>
* assumes 173 paid hours per month – fully allocated cost per additional production hour				
<b>Facilities/IT overhead costs:</b>				
Item	Cost Target			Equivalent Cost per CSR Agent Hour*
Facilities	Based on approximately 100 feet per front line employee			\$1.58
Phone System Licensing and Connectivity	\$225 per agent per month for a full complement of features, including recording, WFM, multi-channel including social media, outbound, built-in DR, etc.			\$1.08
Desktop Application Licensing	\$500 per agent per month to cover email and CRM applications (includes support)			\$2.41
<b>Total</b>				<b>\$5.07</b>
<b>Agent Wage Assumptions:</b>				
Item	From Inputs, plus 40 Percent Benefits			All in Cost Plus Overhead
CSR Rate	\$	22.40		\$37.61

Bottom-up capacity planning with all costs

# Best-in-class WFM examples



Model Inputs - All Numbers in Red Drive Output		
CSR Average Hourly Rate w/o benefits	\$ 16.00	
<b>CSR Activities</b>		
Number of Paid Holidays Per Year	8	
Number of Paid Sick Days Per Year	8	
Number of Paid Vacation Days Per Year	16	
Number of Other Days Per Year (FLMA, Floating, ETC)	4	
Daily Breaks (Mins per Rep per day)	30	
Meetings (Hours per Rep per month)	2	
Non-phone Work (Hours per Rep per month)	10	
Training (Hours per Rep per month)	2	
Other (Hours per Rep per month)	2	
Adherence Rate (% of scheduled work time)	90%	
<b>Service Level Objective</b>		
SLO Objective - Numerator (Percent of Calls to be Answered)	80%	
SLO Objective - Denominator (Number of Seconds)	45	
<b>Capacity Inputs</b>		
<b>Call Routing - Current Calls</b>	<b>Monthly Volume</b>	<b>Avg Handle Time (secs)</b>
Call Type 1	148,875	298
Call Type 2	148,875	248
	0	-
	0	-
<b>First Contact Resolutions Improvement</b>	0.25%	
<b>Call Volume Reduction Improvement</b>	0.50%	
<b>Average Handle Time Improvement</b>	0.75%	
	<b>Per Agent</b>	<b>Total</b>
Current Cost	\$86	\$ 222,361
InContact Cost W/O Efficiency	\$167	\$ 431,793
<b>Total Savings with IC Efficiency FTE Cost Savings</b>		\$ 223,188

After Efficiency	
Total FTE Staff Required	212
Total FTE Staffing Cost	\$ 16,573,163.94
Cost Per Call	\$ 4.64
Cost Per Minute	1.02
Agent Occupancy Rate	95.55%

Current State	
Total FTE Staff Required	215
Total FTE Staffing Cost	\$ 16,796,351.55
Cost Per Call	\$ 4.67
Cost Per Minute	\$ 1.02
Agent Occupancy Rate	95.59%

Total Savings	
Total FTE Staff Required	3
Total FTE Staffing Cost	\$ 223,187.61
Cost Per Call	\$ 0.03
Cost Per Minute	\$ (0.00)

Call Routing - Current Calls	Monthly Volume	Avg Handle Time (secs)
Call Type 1	150,000	300
Call Type 2	150,000	250
	0	-
	0	-

Bottom-up capacity planning with all costs

# Best-in-class WFM examples



- Simple dashboards
- One version of the truth
- Reacting in advance
- Creative intra-day
- Training for all on WFM; it's not just a team in the corner
- Power of One training for all agents
- Know what the metrics mean and why

# Best in class WFM examples



**80/20 SLO**

- 250-second talk time
- 50-second ACW





# Best-in-class WFM examples



**20-  
minute  
AHT**

- 7 hours of phone time
- Caught on 3 long calls a day (20 minutes)
- 30 minutes of other non-adherence time per day

**79%**

**5-  
minute  
AHT**

- 7 hours of phone time
- Caught on 3 long calls a day (5 minutes)
- 30 minutes of other non-adherence time per day

**89%**

# Best-in-class WFM examples



- Agent WFM metrics within their control
  - Show up
  - Follow your schedule
  - Celebrate Mondays—prizes
- Don't view WFM as a race to the bottom
- No after-the-fact schedule adjustments
- Creative scheduling around demand, not agents
- Understand that it's just math ...

# Questions?



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