

BEST PRACTICES AND SOLUTIONS FOR CUSTOMER EXPERIENCE MANAGEMENT AND SPOTLIGHT ON CO-NEXUS CXM

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Many factors are driving a sea change in management perception of the corporate call center. There is a growing recognition that the quality of all customer touch points is critical to achieving revenue, profitability, and customer care objectives. Organizations can effectively differentiate themselves from their often larger competitors by providing customer service that is more than just satisfactory. Satisfaction alone is not enough. Most customers that change vendors or service providers were "satisfied" before they defected. World-class call centers seek to delight customers by demonstrating knowledge, communications skills, and superior ability to resolve problems on the first contact. Positive interactions create defining moments that leave a lasting impression on current and prospective customers. The result is reduced customer churn and increased customer lifetime value. Several research studies have shown that it costs five to ten times as much to replace a lost customer than to retain one.

Well managed call centers seek a balance between customer delight and cost effectiveness. Achieving this balance requires investments in sophisticated customer experience management applications like customer relationship management, interactive voice response, quality monitoring, workforce management, and computer-based training.

Cost and complexity have limited the deployment of customer experience management applications to larger contact centers, typically 200 agents or more. However, about 80 percent of the nation's 60,000 formal call centers have fewer than 75 agents. Smaller centers have equal if not greater need for these products but lack the six and even seven figure investment budgets and the skilled personnel to acquire and manage these technologies.

This paper is addressed to those organizations that have small to mid-size call centers or are in the process of creating their first formal call center. The intent is to explain the core functions of customer experience management, point out the best practices observed by world class call centers, and introduce the CXM suite of software applications from Co-nexus, Inc., - an integrated, easy to use, and affordable alternative for companies with big business needs and small business budgets.

Why Invest In Customer Experience Management Technology?

Companies invest in customer experience management systems to insure consistent, accurate, and positive customer interactions and to reduce call center operating costs. The core elements of customer experience management are quality monitoring, agent evaluation, agent coaching and training. Together, these comprise a 360 degree cycle of continuous agent performance improvement.

Other important benefits of customer experience management technology are:

- Increased customer retention
- Reduced training time and costs
- Revenue increases from up-selling and cross-selling
- Communicating the core values of the enterprise
- Assuring compliance with state and federal regulations
- Effective customer dispute resolution
- Archiving and mining the valuable market information captured in customer interactions

The Co-nexus CXM Suite

Co-nexus CXM (Customer eXperience Management) is an integrated web-based suite of innovative applications that provides all of the core customer experience management functions and many advanced capabilities found only in the most expensive solutions used by large call centers. The turnkey system consists of a dedicated server, voice processing hardware, online call storage, web browser client and administrator interface, and applications software. The open architecture design assures the system can readily accommodate future advances in recording, compression, computing, storage, and search technologies. Agent and supervisor portals provide easy web access to important information such as stored calls, evaluations, messages, and training materials. The CXM suite includes over 60 built-in reports to track agent progress, spot trends, and calibrate supervisor evaluations. Further, CXM-gathered data is stored in SQL Server and is easily exported to popular reporting applications like Crystal to create customized reports. Data communication is over the corporate LAN, leveraging the security and fail-over protection of your existing infrastructure

CXM provides all the capabilities required by small to mid-size call centers and is so easy to use that call center personnel can be trained in one day and become more productive the next. Co-nexus, Inc. provides training for agents, supervisors, and administrators. Continuous support is offered via phone and email.

In this white paper I will address critical steps every call center should consider in order to delight their customers. These include goal setting, quality monitoring, agent evaluation and coaching and training. After each will be a brief discussion of how the Co-nexus CXM suite addresses these concerns.

Goal Setting

Overview

The most critical first step in developing a successful call center is goal setting. Goals will differ by the nature of the organization and the primary functions of the call center. Sometimes goals will be in conflict. Therefore, it is necessary to apply weights to different evaluation metrics, a capability that is inherent in Co-nexus CXM. The classic conflict is between efficiency and effectiveness. For example, your call center may be tasked with both administrative and revenue generation goals. Customers may call to report address changes, check on deliveries, or question invoices. Increasingly, managements are asking, sometimes requiring, call centers to generate revenue. Customer contacts are viewed as opportunities for cross-selling and up-selling. Restrictions such as do-not-call regulations have crimped the outbound telemarketing. However, firms are free to market to inbound callers under the existing customer provisions. Metrics such as average handle time and calls per hour will be very pertinent

to administrative responsibilities but not at all pertinent to evaluating revenue generation responsibilities, where up selling and cross-selling efforts will be expected to take longer. Similarly, if the function of the call center is technical support or debt collection the number of calls handled and the time it takes to complete the interaction is less meaningful than the accuracy of the information communicated and the amount of money collected.

It is very important that call centers establish both qualitative and quantitative goals and that these goals mesh with overall organization objectives. Nebulous goals like "increase customer satisfaction" should be expressed as measurable metrics. For customer satisfaction - first contact resolution, time-to-answer, holding times, and scores on customer satisfaction surveys are the best indicators. Once approved, departmental goals need to be translated into individual goals for each supervisor, agent, trainer, and quality assurance specialist. These individual goals will vary by level of experience and specific job functions.

Quality Monitoring

Overview

The recording and analysis of customer interactions forms the core of an effective quality management program. Over 90 percent of very large call centers deploy sophisticated quality monitoring systems. However, only about one-fourth of call centers with fewer than 30 agents use automated systems. Without equipment to store, archive and retrieve customer interactions quality monitoring must be performed manually, by supervisors sitting side-by-side with agents or listening remotely through the service observe function of the ACD. Manual methods are inherently problematic. The side-by-side approach wastes time as the supervisor waits for coachable calls. Since the agent knows she is being monitored she either shines to impress the supervisor or becomes nervous, creating an unnatural interaction. Remote monitoring through service observe produces no tangible record of the call that could later be used as a coaching tool.

For organizations that do use automated quality monitoring systems the most common practice today is to record a sample of calls, enough to get a meaningful representation of the customer care performance of individual agents. The sample is very small, typically less than one percent of calls. The trend, however, is to record all calls. This practice provides a deep data base from which to select representative calls for evaluation and coaching. As the price for system hardware has come down the associated cost of recording and storing 100 percent of the calls has diminished as well. Recording all calls is also very important for compliance and liability. State and federal regulations such as requirements of the Federal Trade Commissions for Express Verifiable Authorization (EVA) demand that vendors maintain a record of purchases and customer details, and that specific disclaimers be read to the customer. EVA requirements apply to up selling and cross-selling as well as outbound telemarketing. In these instance recording of 100 percent of the calls is a critical technique to ensure compliance.

Best Practices in Quality Monitoring

- *Get buy-in from agents. If your company has not used automated recording systems before, anticipate some initial resistance.*
- *The senior manager of the call center must explain that the new QM system will help them become better agents. Quality monitoring and subsequent evaluations are not substitutes for performance evaluations and agents should understand that.*
- *Arrange for hands-on training from the vendor. Special training is required for individuals tasked with administering the software and generating reports.*
- *In call centers with 100 or fewer agents, monitoring should be performed by the agent's direct supervisor. The ideal ratio of agents to supervisors will vary by industry, but should not exceed 15: 1. World class call centers have a ratio of 11:1.*
- *In larger call centers it is best to have dedicated quality assurance personnel or team leaders perform the monitoring and evaluation functions.*
- *If specialized knowledge is required, for example product installation and operation, company experts should also periodically monitor a sample of calls.*
- *New employees should be monitored continuously until they have reached a basic level of competency. For the first month, supervisors should monitor at least two calls per day from the new agent and then two calls per week for the next five months.*
- *As an ongoing practice, supervisors should strive to monitor 3 - 5 percent of agent calls per month.*
- *Experienced agents that demonstrate consistent high performance do not need to be monitored on a monthly basis.*
- *Supervisors should strive to monitor **coachable** calls. These calls can be defined as longer than the group average, frequent transfers, repeat calls from the same caller, or other parameters chosen by the supervisor.*
- *Interactions that demonstrate superior skills should be saved to the online library for future training.*
- *Recorded interactions include a veritable goldmine of market information that needs to be archived and shared with senior management.*
- *Monitor screen actions as well as voice.*

Co-nexus CXM for Quality Monitoring

The CXM application is scalable and can be configured in a number of ways to ensure comprehensive recording and to minimize investment. Supported recording integrations include trunk side, station side, select observe and VoIP recording. Recorded calls are compressed and indexed with call data. CTI integrations are available to most major communication systems. Business rules data can also be attached to the recordings. CXM supports call logging (recording 100 percent of the calls) and/or quality monitoring (recording a sampling of the calls). CXM also records the agent's PC activity. PC screen recordings and voice recordings are archived together so supervisors can coach agents on both call handling and work flow processing. The screen playback is synchronized with the recorded voices and presented in a fluid movie format. Ensuring that agents are capable of efficiently navigating through their data applications improves call handling rates and customer satisfaction. Screen capture technology is used to identify agent PC related deficiencies that can be addressed using the CXM Training Video technology.

The CXM application can be programmed to record a specified sample of calls, all calls, calls of certain duration, calls from certain customers, or calls on specific topics - like product and service quality. Recording can also be triggered by business rules. For example, data recording may be automatically initiated when certain forms are accessed. Stored interactions may be retrieved at any time from a web based user interface and/or CXM Agent Portal. System administrators typically restrict agents from retrieving calls by other agents unless these calls are deposited in a public folder for training and illustration purposes.

Supervisors can easily query the recording database to obtain a list of recordings for their call center agents. From the recorded calls list the supervisor can listen to the call, evaluate the call, save the call, email the call or add the recording to the training library. Easy to use search tools allow supervisors to search for interactions from specific agents, specific callers, specific call parameters (such as length of call), specific days and time of day, and other classifiers.

The screenshot shows the CXM application interface. At the top, there is a navigation bar with links for SEARCH, COACHING, REPORTS, ADMIN, SYSTEM, HELP, and MY LOGIN. Below this is a search bar with a 'SEARCH -> QUICK SEARCH' button. The main search area includes filters for 'From Date' (12/1/2005), 'To Date' (1/23/2006), 'Station' (3902), 'Agent' (Brian Daily), 'Caller/Called Id', and 'Page Size' (10). A 'Search' button is located to the right of these filters. Below the search filters, a table displays the results for agent 'Brian Daily'. The table has columns for Start Time, Agent Name, Call Direction, Call Duration, and Dialed. The results show 10 calls, all for agent 'Brian Daily', with various call directions and durations.

Start Time	Agent Name	Call Direction	Call Duration	Dialed
1/2/2006 6:58:57 AM	Brian Daily	Inbound	00:00:31	
1/2/2006 9:37:05 AM	Brian Daily	Inbound	00:05:12	3902
1/2/2006 9:58:08 AM	Brian Daily	Outbound	00:08:37	3930
1/2/2006 11:24:32 AM	Brian Daily	Outbound	00:00:04	98325732413
1/2/2006 11:42:22 AM	Brian Daily	Inbound	00:01:06	3902
1/2/2006 11:59:07 AM	Brian Daily	Outbound	00:03:29	97139521630
1/2/2006 12:02:42 PM	Brian Daily	Outbound	00:01:57	918009322732
1/2/2006 2:00:03 PM	Brian Daily	Outbound	00:01:29	97132736880
1/2/2006 2:01:36 PM	Brian Daily	Outbound	00:00:24	97132736883
1/2/2006 2:02:14 PM	Brian Daily	Outbound	00:00:59	97132736880

Screen shot of CXM showing recorded calls for agent 'Brian.' From this screen the supervisor can access the recorded agent-customer interaction and one-click to listen, evaluate, email or save it.

The CXM Screen Capture module records all data accessed by the agent during the course of the recorded call. The recorded agent PC activity is replayed in a movie format showing exactly how the agent navigated through the data application.

Agent Evaluation

Overview

The agent evaluation process helps assure goal attainment and conformance to the quality standards established by the call center. Evaluators are better served grading recorded calls instead of live calls as they can select the appropriate call to grade and have the ability to control the speed of playback while progressing through the grading form. Simple customized grading forms should be used for this purpose. Yes-no choices and scaled check box responses work best. The grading forms need to reflect the goals of the enterprise, the call center, and the individual agent. This can be done by organizing the rating questions by category such as courtesy/professionalism,

listening skills, product/service knowledge, response accuracy, following procedures, and selling skills. Evaluators should add notes to assist in coaching. Responses should be weighted to reflect the relative importance of each question. In world-class call centers direct customer feedback is generated through survey mechanisms. If available, customer ratings of the monitored call should be included in the evaluation form.

The evaluator (typically the agent's direct supervisor or team leader) then reviews the evaluation with the agent. For effective training it is critical that the recorded call upon which the grading form is based be replayed for the agent during the evaluation session. Superior skills should be acknowledged through group recognition or a small incentive reward. Adding the interaction to the library of model calls builds a valuable resource for coaching and agent self-development. The completed forms are archived and should be accessible to both individual agents and supervisors.

It is very important to conduct periodic calibration sessions. The purpose of these meetings is to help assure consistency among evaluators. Evaluators listen to a series of calls then each independently rate the calls. The session moderator then leads a discussion to reconcile significant disparities in individual ratings. In world-class call centers ratings will not vary by more than 10 percent, regardless of which person performs the evaluations.

Call monitoring evaluations should not be confused with performance evaluations. Performance evaluations are much broader in scope and take into account both metrical data, as created by the ACD and QM evaluations, and interpersonal and leadership skills.

Best Practices in Agent Evaluation

- *Evaluation forms should reflect the goals of the enterprise, the call center, and the agent.*
- *Interaction evaluations should be part of the larger agent performance and development plan.*
- *The evaluation forms should be prepared by supervisors. There should be different forms for varying experience levels and skill sets.*
- *Scores should be weighted in accordance with the relative importance of the goals.*
- *Customer feedback should be included in the evaluation process.*
- *Evaluations should be performed by the agent's direct supervisor or team leader.*
- *Evaluation frequency and performance expectations and will vary by the agent's level of experience.*
- *The interaction evaluation process should account for the total interaction, including both voice and screen skills.*
- *Evaluation should be an integral part of the coaching function.*
- *As part of the self-development process, agents should be encouraged to monitor and score their own calls.*
- *Scoring should be consistent with all evaluators. Periodic calibration sessions are required to achieve this consistency.*
- *Examples of superior calls should be acknowledged and rewarded.*

Co-nexus CXM for Performance Evaluation

The CXM Performance Evaluation module allows managers to complete evaluation forms while listening to the recorded calls. Supervisors create their own evaluation forms and store them on the CXM server. The process is simple and straightforward. To add a new form, simply select 'add new form" from the drop-down menu on the supervisor's portal. Within each form different sections of the call are created with their own weights. Then the evaluation questions can be added to each section. Once the questions have been created response scales are applied. These could be simple yes/no answers or rating scales. The CXM system supports an unlimited number of evaluation forms.

Customer Service Representative

agents: 3902 - Brian Daily
 Customer: Caller ID

Date of Evaluation: Current Date Agent: Station Name

Call Time: Start Time

Greeting Customer Verification **Interaction** Comments

Interaction

Was CSR's interaction with customer appropriate?

	Excellent	Good	Average	Poor	NA
+Was CSR's tone of voice helpful, courteous and pleasant?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR speak clearly?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR listen without interrupting?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did the CSR manage the flow of the conversation?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did the CSR give the customer their undivided attention?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR refrain from using Company jargon?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR use customers name during the call at least once?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+If callback was required, did CSR give approximate time?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR show empathy and acknowledge customers concerns?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR give accurate information?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+Did CSR represent company at all times?	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
+					52/55 = 95%

Greeting	100% x .25 = 25%
Customer Verification	75% x .25 = 18.75%
Interaction	95% x .50 = 47.5%
TOTAL SCORE:	91.25%

Form loaded successfully.

Done

Sample evaluation form, with 3 different evaluations individually weighted with scoring results in the bottom right.

In conjunction with CXM call recording, supervisors have the flexibility to listen to and grade recorded calls at their convenience. They can also add comments to each evaluation. The intuitive folder system lets graders deposit calls to be graded in one folder and completed evaluations in another. Superior calls are deposited in a special public folder that can be made available to every member of the call center team. Supervisors can also store calls by topic.

Each completed evaluation form is archived along with the recording of the customer interaction. Agents can access their monitored calls and evaluations from their private Agent Portal. The CXM Agent Portal is the call center agents' virtual classroom containing their recorded calls, evaluations, example calls, tests, training videos and bulletins.

Co-nexus's new CXM Version 4.0 provides automated customer satisfaction survey capability – a feature rarely seen in mid-sized quality management systems. In the CXM Survey module, callers hear pre-recorded questions and either enter their response on their touch-tone phone or provide verbal responses. Reports can be run on the customer completed surveys to ascertain actual satisfaction levels. Each survey is linked to the customers' call that preceded the survey. If a negative survey is given a supervisor can easily drill down and hear what happened during the call that resulted in customer dissatisfaction. Surveys are also an excellent way to calibrate customer experiences with supervisor's evaluation habits. Through CXM Survey customers can grade the agent's performance just like call center evaluators. Comparing the grading results from evaluators and customers is an excellent form of calibration ensuring that evaluations are in line with customer satisfaction.

The screenshot shows the 'CXM - Connect Survey' interface. At the top, there are four tabs: 'Create Surveys', 'Manage Surveys', 'Survey Results', and 'Survey Settings'. On the left, under 'Surveys', there is a dropdown menu showing '3000 - Test Survey' and a 'Delete' button. The main area displays a list of questions:

#	Question	Type
1	Did you have a good experience today	Yes/No
2	How do you feel overall	Options
3	Leave any additional comments	Voice Recording

Below this list, question 1 is expanded to show its configuration:

1

Question Text
How do you feel overall

Question Type
Options

To the right of the question text is a table for defining options and their point values:

Key	Speech Text	Pts
1	Good	10
2	Excellent	20
3		
4		
5		
6		
7		
8		

CXM Customer Satisfaction survey.

Coaching and Training

Overview

Coaching is integral to an effective customer experience management. Coaching must be constructive and timely. The best time is right after calls have been evaluated. The agent and the supervisor review the calls together, identifying areas of superior performance and areas for improvement. Successful coaches will encourage agents to manage their own self development by using the tools provided by the applications software and the resources available in the enterprise.

Coaching is one of several forms of training. Agent training includes a mix of instructor-led training, computer-based training, mentoring, coaching, and self-learning. Subject matter varies by company but typically includes:

- Product/service knowledge
- Administrative procedures
- Telephone techniques and
- Screen navigation

As more call centers become accountable for revenue growth world class call centers are emphasizing customer retention, up selling and cross selling, and building customer rapport.

Recruitment and training represent a significant investment. The average cost to bring on a new agent, (advertising, recruiting, screening, testing, interviewing, and training) is about \$6500. For very specialized call centers such as technical help desks the cost can be as high as \$35,000. With turnover rates of 30 percent or greater at many call centers it is always a good practice to protect this investment in human capital. The best managed call centers have an ongoing agent retention program as well as formal training procedures.

Training requires resources. These will include a library of scripts, presentations, videos, model calls, product descriptions, wrap-up procedures, third-party CD's, and internal subject matter experts who are willing to lead training sessions. While third-party materials will be helpful for specific situations, in most cases training needs are specific to the organization and the circumstances. Supervisors and trainers need to have the tools to quickly and effectively produce their own materials.

A very effective training method is to empower agents to manage their own self-development. Call center management should provide agents with desktop access to a broad menu of training resources. Ongoing communications are essential. Agents must be immediately notified of important developments such as new product announcements, press releases, price changes, and other actions that customers may become aware of. The internal messaging system is more cost effective for this purpose than holding frequent update meetings.

The training function and the personnel responsible must be periodically evaluated. Authoring tools should be available to allow trainers to create tests which can be deposited in the agent's portal and self-administered.

Best Practices in Coaching and Training

- *New agents should be initially trained as a class. Eight trainees is a normal class size.*
- *Coaching should occur as soon as something prompts the need, such as evaluation.*
- *The best call centers spend less on initial training but more on ongoing agent development.*
- *Use input from agents when structuring a training program. They know what they need.*
- *Initial training should be the same for all. Ongoing coaching and training should be tailored to the specific needs of the individual.*
- *Training costs must be forecasted and budgeted. Work with your human resources department to secure an adequate allocation of training personnel and funding.*
- *Protect your investment with a formal agent retention program.*
- *Empower agents to manage their own self-development.*
- *Measure and evaluate the training function just as rigorously as agent performance. Testing as an important part of the evaluation process. Results should be similar regardless of who did the training.*

Co-nexus CXM for Coaching and Training

The heart of the CXM coaching and training application is the Agent Portal. Within the Portal each agent can access their recorded calls, evaluations, example calls, training videos, tests, and bulletins. Supervisors and others with assigned coaching responsibilities can listen to and score sampled calls at anytime. Using the library of self-constructed evaluation forms they can score the calls and add their own coaching notes. Model calls are deposited into the public folder for later access by coaches and agents. Since screen actions are recorded with voice interactions coaches can readily spot any weaknesses in using desktop applications and accessing corporate resources.

Supervisors can create training videos from their work stations. These are ideal for initial training and ongoing coaching on business processes. For example, a training video can be easily created showing agents exactly how to add a new customer to the sales automation system. Voice instructions are included on the video guiding the agent through the process. Training videos are disseminated for viewing from the CXM Agent Portal.

To reinforce skills taught through training techniques supervisors can easily create tests in the CXM system. Tests are then distributed over CXM's secure e-mail server and deposited into the Agent's Portal. Test scores are archived and can be retrieved at anytime from the supervisor to confirm successful completion of the test.

Supervisors can also create bulletins. These are one-way emails to individual agents or groups of agents. Senders can attach documents such as press releases and new pricing sheets. Bulletins are ideal for keeping the call center team abreast of new developments. The private email function of the Co-nexus customer experience management system obviates the need for Internet access with its attendant distractions of web surfing and personal emails.

Conclusion

Small to mid-size enterprises have the same or greater need to delight their customers with superior contact experiences. Observing best practices actually costs less than trial and error. Today the smaller contact centers can afford the same sophisticated customer care technologies as the big call centers. The Co-nexus CXM suite of quality monitoring, customer satisfaction surveys, evaluation forms, and training tools provide all the capabilities you need from a single vendor that focuses its product design and customer support on businesses like yours.

About the Author

After a 25-year career with leading telecommunications equipment manufacturers and consulting firms, Dick Bucci formed Technology Marketing Associates. Dick is also Associate Consultant for The PELORUS Group (www.pelorus-group.com) where he specializes in contact center technologies. He has authored in-depth reports on interactive voice response, workforce management, and quality monitoring. Dick's articles and observations have been published in CRM Today, Contact Center World, Communications Convergence, Call Center Magazine, Contact Professional, Call Center News, Speech Technology, Workforce Performance Solutions, and other trade and business publications. Dick is a regular contributor to Commweb where his popular column, "Bucci's Spotlight on Marketing" is read by tens of thousands worldwide.

About Co-nexus

Co-nexus, Inc. is a privately held company based in Houston, Texas. We strive to develop a comprehensive suite of call logging and quality monitoring products that are easy to use, competitively priced and customizable to fit the needs of the small to medium size call center. Our customers are our partners and we are committed to providing the highest level of service and support to each of them. For more information visit the Co-nexus CXM website at www.4cxm.com or call us at 866.400.4CXM.

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