

# Guide to call center metrics

*Presented by SearchCRM.com in partnership with Strategic Contact*

## *Top 10 call center metrics*

Metric	Acronym	Definition	Application	Tips about using this metric
Service level	SL or SVL	Percentage of calls (X%) answered with in Y seconds.	<ul style="list-style-type: none"><li>Service level is generally measured for each time interval (e.g., half hour) and often reported on a daily, weekly, or monthly basis. Service level applies to a given queue, phone number, or group/skill set.</li><li>Service level is generally expressed with notation such as "80/35" (for 80% in 35 seconds).</li></ul>	<ul style="list-style-type: none"><li>Service level is a common method for measuring the service to a particular queue or call type. It is one of the most important measures of customer experience.</li><li>Service level is a key target metric to use for performance and workforce planning.</li><li>A typical target would be 80% of all calls answered within 20 seconds (although there are no standards; each center must determine its target service level based on many factors, including business goals and budget).</li></ul>

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<b>Quality monitoring scores</b>	<b>QM</b>	<b>Numerical scoring and notes/feedback about the service provided to customers.</b>	<ul style="list-style-type: none"> <li>▪ Quality monitoring scores are normally used in reference to call monitoring, using some sort of scorecard. However, it can actually be any quality measurement referring to calls, paperwork, web interactions or email.</li> </ul>	<ul style="list-style-type: none"> <li>▪ May be expressed as a numerical grade or percentage value.</li> <li>▪ Most commonly used to determine individual call center agent performance, but is also used in aggregated scoring at the team, center and enterprise levels.</li> <li>▪ It's important to design monitoring and score sheets and elements that are as objective as possible.</li> <li>▪ It's extremely important to provide feedback to the agent as soon as possible following observation.</li> </ul>
<b>Customer satisfaction</b>	<b>CSAT</b>	<b>Measure of the overall satisfaction of the interaction or service.</b>	<ul style="list-style-type: none"> <li>▪ Customer satisfaction is an important measure of success and is vital method of feedback for process and product improvement.</li> <li>▪ Companies that devote energy and resources into determining their customer satisfaction are more easily able to maintain a competitive position.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Ideally, the customer satisfaction survey is focused on the call center/customer interaction (not overall products/services) and is tied to a contact.</li> <li>▪ Customer satisfaction is customarily measured by a survey, either in-house or third-party.</li> <li>▪ Common methods of surveying include: <ul style="list-style-type: none"> <li>○ Automated surveys (IVR) immediately after the call</li> <li>○ Telephone surveys and call backs</li> <li>○ Company Web Site</li> <li>○ Mail</li> <li>○ Email</li> </ul> </li> </ul>

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<b>Adherence</b>	<b>N/A</b>	<b>Total time an agent is available for call work divided by the time they are scheduled expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>▪ Schedule adherence is used to ensure that agents work the amount of time they are supposed to work.</li> <li>▪ Sometimes adherence can take into account the specific times an agent takes breaks and other time off the phone (often referred to as “compliance”).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Used in a high volume/large call center environments where CSR availability is not easily seen or monitored. It is a method of measuring whether or not agents are signed on for the required time.</li> <li>▪ Workforce management systems may provide this information either expressed as a percentage, or also how many minutes (+,-) an agent was out of compliance with his or her schedule. Some flexibility is allowed to accommodate the unpredictability of call lengths.</li> <li>▪ Some will differentiate adherence (amount of time) with compliance (specific times), the latter being more detailed and rigorous time tracking.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Occupancy (also called utilization)</b>	<b>OCC</b>	<b>Total handle time divided by total time signed into the queue expressed as a percent.</b>	<ul style="list-style-type: none"> <li>▪ Occupancy is the amount of time an agent spends either talking or in after call work from handling a customer call.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Since agents cannot control their own occupancy this metric is a “big picture” metric which provides a high level snap shot of how resources are being used. Inversely, it reflects how much time call center agents on average are “waiting” for a call.</li> <li>▪ An 85% occupancy rate means that 15% of the agent’s time is available and waiting for a call. Occupancy will be lower for smaller groups and higher for larger groups. If occupancy runs too high, too often, it can lead to “burn out” and turnover.</li> <li>▪ Occupancy is a key factor looked at in workforce management/planning. The workforce planner and managers/supervisors should be accountable for occupancy.</li> </ul>
<b>Average handle time</b>	<b>AHT</b>	<b>The total amount of work time related to calls, including ATT and ACW, divided by the number of calls handled</b>	<ul style="list-style-type: none"> <li>▪ Average handle time is the total average amount of time an agent spends talking and in post call work in relation to a call.</li> <li>▪ Comprised of average talk time (ATT) and average after-call work time (ACW).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Average handle time is a metric which can be monitored or measured at an agent, center or enterprise level.</li> <li>▪ Similar to average talk time, average handle time can be easily manipulated so caution is given to how this metric is monitored or measured.</li> <li>▪ Aside from call volume and service level, it is the most critical metric in determining the workforce required.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Number of calls offered</b>	<b>NCO</b>	<b>Total number of calls offered to a queue.</b>	<ul style="list-style-type: none"> <li>▪ Calls or contacts offered to a queue are important metric to help quantify the amount of resources and staff needed to handle the queue.</li> </ul>	<ul style="list-style-type: none"> <li>▪ May be used in several ways: <ul style="list-style-type: none"> <li>○ The total number of callers seeking service or contact (before reaching an IVR or recorded message)</li> <li>○ The total number of calls that were available to be answered by the queue (post IVR selection and recording)</li> </ul> </li> <li>▪ It is important to differentiate exactly when an organization is counting a call as “offered.” This will vary from company to company. It can be measured at the network level, but is usually measured at the switch. Thus, blocked calls can be missed.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Forecast versus actual (calls)</b>	<b>+,- FCST</b>	<b>Expressed as a percentage of the difference between the amount of calls forecasted and the amount actually received. +, - % above or below forecast</b>	<ul style="list-style-type: none"> <li>Accurately forecasting the amount of volume is critically important for call centers. It is a key element for determining the appropriate amount of resources required.</li> </ul>	<ul style="list-style-type: none"> <li>Telephone distribution systems (ACDs) and workforce management systems (WFM) work in conjunction to provide comparisons of actual call and contact volumes received and staff required with what was forecasted and projected.</li> <li>High importance is placed on forecast accuracy as it directly drives the cost of labor and impacts the customer experience (proper forecast leads to proper staffing and good performance).</li> <li>This metric is usually monitored and measured at multiple levels – interval, day, week, month.</li> </ul>
<b>Forecast versus actual (average handle time)</b>	<b>+,- FCST</b>	<b>Expressed as a +,- % above or below forecast – Also expressed as a number +,- above or below forecast</b>	<ul style="list-style-type: none"> <li>Accurately forecasting the length of calls and contacts is the second most critical component for determining the appropriate amount of resources required</li> </ul>	<ul style="list-style-type: none"> <li>Anticipated handle time multiplied by the “amount of calls that need to be handled” determines the base work load requirement.</li> <li>Automatic call distributor systems track and report average talk time, after-call work time and total average handle time.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Cost per contact</b>	<b>CPC</b>	<b>Total of all costs associated with answering a call or handling a contact divided by the total number of calls or contacts.</b>	<ul style="list-style-type: none"> <li>Cost per call/contact is a common metric used widely across all industries. Monitoring cost per call allows management to determine where to spend valuable funds on technology and process improvement.</li> </ul>	<ul style="list-style-type: none"> <li>It is important to clearly identify which costs are included and not included in the cost. <ul style="list-style-type: none"> <li>Are shared resources like HR, IT, facilities included in your calculation?</li> <li>Are they determined on a pro-rated basis or are they straight costs?</li> </ul> </li> <li>Usually monitored/measured as a specific period of time – weekly, monthly, quarterly.</li> <li>Generally broken out by channel/media (e.g., self service via IVR, web; assisted service via phone, email, chat)</li> </ul>
<b>Blocking rate</b>	<b>N/A</b>	<b>Percent of calls offered that are not allowed into the system; generally % receiving busy, but may also include messages and forced disconnects.</b>	<ul style="list-style-type: none"> <li>Blocking is an important metric to consider to ensure that you are allowing your customers access to your center. It is generally kept very low (under 1%).</li> </ul>	<ul style="list-style-type: none"> <li>Blocking rate must be considered along with service level to ensure that the customer has access; you can meet service level but have a high blocking rate, and therefore dissatisfied customers.</li> <li>Blocking is sometimes used for extreme peaks to flatten them out (e.g., tickets go on sale at 10 a.m.).</li> <li>The network provider is generally the source for blocking reports (percent busies). If you accept calls and then give out a busy or disconnect from the automatic call distributor systems, you report on it from the automatic call distributor reports.</li> </ul>

### *Honorable mention call center metrics*

Metric	Acronym	Definition	Application	Tips about using this metric
<b>First call resolution rate</b>	<b>FCRR</b>	<b>The number of times a customer inquiry is completed on the first call expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>▪ Important as an indicator of customer satisfaction, effective processes and technology effectiveness.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Difficult to measure – often done as a manual process by comparison and tracking of network call data and process history (system) data.</li> <li>▪ Particularly difficult to track across multiple channels.</li> <li>▪ CRM systems, where implemented, have aided greatly in helping to isolate FCCR through accurate tracking of all contacts across multiple media – call, mail, email, web and chat.</li> </ul>
<b>Employee satisfaction</b>	<b>ESAT</b>	<b>Satisfaction and morale of the employees</b>	<ul style="list-style-type: none"> <li>▪ Employee satisfaction is an important measure of success and is vital method of feedback for morale and process improvement.</li> <li>▪ Companies that devote energy and resources into determining their employees satisfaction are more easily able to manage turnover and maintain a competitive position through increased employee feedback and process improvement</li> </ul>	<ul style="list-style-type: none"> <li>▪ ESAT customarily measured by surveys, either in-house or third-party.</li> <li>▪ Common methods of surveying include:               <ul style="list-style-type: none"> <li>○ Company web site</li> <li>○ Mail</li> <li>○ Email</li> </ul> </li> <li>▪ Team meetings, informal gatherings (e.g., brown bags) and suggestion boxes do not serve the same purpose.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Revenue</b>	<b>N/A</b>	<b>The total amount of revenue generated from calls or contacts, divided by the total number of calls and / or contacts handled.</b>	<ul style="list-style-type: none"> <li>▪ Used in environments where sales or add on revenue is generated from contact handling.</li> </ul>	<ul style="list-style-type: none"> <li>▪ This metric is frequently used when comparing the cost of distribution and sales channels.</li> <li>▪ For example: How much revenue are we getting from handling contacts in this channel versus the cost to handle them?</li> </ul>
<b>Shrinkage</b>	<b>% Shrink</b>	<b>The amount of planned off phone time expressed as a percentage. Example elements are absenteeism, breaks &amp; lunches, training, team meetings.</b>	<ul style="list-style-type: none"> <li>▪ Example elements are absenteeism, breaks &amp; lunches, training, team meetings.</li> </ul>	<ul style="list-style-type: none"> <li>▪ A key element used in workforce planning, Shrinkage may be applied within a workforce management system, or through manual forecast and staffing calculations.</li> </ul>
<b>Self-service rate</b>	<b>SSI (IVR) Or SSW (Web)</b>	<b>The rate in which customers choose and succeed at self service expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>▪ Self-service options are particularly important in high transaction environments where human interaction is not required.</li> <li>▪ Self-service usually refers to interactive voice response, Web and interactive voice response speech calculations.</li> <li>▪ Common calculations are in the interactive voice response, with richer, more complex calculations on the Web.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Self-service is important as an indicator of the cost of service, as self-service channels are lower cost.</li> <li>▪ Self-service rate can be difficult to define. Ideally, the calculations track successful completion of a transaction or information request (not just activity, or hang up vs. transfer out).</li> <li>▪ Self-service rates can vary with the hours of operation of the center (is there anyone to opt out to?), so that should be taken into account for average rates.</li> </ul>

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<b>Response time</b>	N/A	<b>The percentage of non-real time contacts (e.g., email) handled in a target time.</b>	<ul style="list-style-type: none"> <li>Response time is the service level equivalent for non-real time contacts such as email.</li> </ul>	<ul style="list-style-type: none"> <li>Generally, response time targets are set at 100% within a target number of hours or days.</li> <li>Some centers will measure initial response and then closure (e.g., acknowledge and assign an email, vs. respond with an answer)</li> </ul>
<b>Accuracy rate</b>	N/A	<b>The rate of correct (accurate) transaction handling, expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>Accuracy rates may be measured in a variety of ways, but are usually measured as a sampling of a larger pool of transactions – for example per 1,000, per 10,000, etc. The metric measures the number of correct or accurate transactions of the base sampling number.</li> <li>Accuracy rates are also often expressed as the inverse of an error rate. If an organization samples 100 transactions and finds 20 of them with errors, the accurate rate would be 80%.</li> </ul>	<ul style="list-style-type: none"> <li>Accuracy rate is important not only because of its effect on customer satisfaction and first call resolution rates, but also has a large effect upon the amount of rework and additional staff required.</li> <li>Accuracy rate is often measured more for non-contact processes such as back office work, but can be important for transaction-based centers. Accuracy may be measured through quality monitoring or through a specific process review.</li> </ul>
<b>System availability</b>	N/A	<b>Availability of the system to support business or process transactions expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>This refers to time outside of scheduled maintenance.</li> </ul>	<ul style="list-style-type: none"> <li>IT is generally responsible for system availability.</li> </ul>

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<b>System response time</b>	N/A	<b>Amount of time that it is taking a system or application to process a request for information – usually expressed in seconds</b>	<ul style="list-style-type: none"> <li>This metric is important to monitor because it has a direct correlation to call and contact handling time.</li> </ul>	<ul style="list-style-type: none"> <li>IT is generally responsible for system availability.</li> <li>System response time is a critical component of average handle time for calls and contacts.</li> <li>A slow system response time will lengthen the call or contact and increase the headcount required to handle contacts.</li> </ul>
<b>Conversion rate</b>	N/A	<b>Generally refers to the number of contacts resulting (converted) into a sale, divided by the number of contacts handled, expressed as a percentage.</b>	<ul style="list-style-type: none"> <li>If 70 out of 100 contacts handled in the queue were converted to a sale, the conversion rate would be 70%</li> </ul>	<ul style="list-style-type: none"> <li>Conversion rate can also refer to additional or add on sale above the original order or sale (cross-selling and up-selling environments).</li> <li>This metric is frequently used in catalog sales and service desks as a method of increasing revenue and driving down cost. <ul style="list-style-type: none"> <li>It costs the company little more to ask for additional business than it does to generate the call in the first place.</li> <li>It is also an effective way of reducing over stocked inventory.</li> </ul> </li> <li>It is used heavily in the telecommunication industry where revenue increases are mostly seen by adding additional features and services to existing customers.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Turnover</b>	<b>N/A</b>	<b>The amount of employees leaving voluntarily or involuntarily during a specific range of time expressed as a percent.</b>	<ul style="list-style-type: none"> <li>▪ Turnover rates are watched closely by most call center organizations. It usually takes a long time to find the right employees and train them. It is even longer before they reach proficiency. Very few organizations can afford high turnover both in cost and service quality.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Employee hiring and training represents a large expenditure and investment for most companies. High turnover rates result in increased cost and reduced customer satisfaction.</li> <li>▪ In addition to voluntary and involuntary, turnover, there are two additional categories to differentiate when monitoring or analyzing turnover. <ul style="list-style-type: none"> <li>○ Planned – Internal transfers, promotions</li> <li>○ Unplanned – Terminations</li> </ul> </li> </ul>
<b>Number of outbound calls</b>	<b>NOC</b>	<b>The total number of calls dialed out.</b>	<ul style="list-style-type: none"> <li>▪ Number of outbound calls is used to monitor valid business activity to reach out to customers (e.g., for follow up) and may be used to monitor other outbound calls made by agents.</li> </ul>	<ul style="list-style-type: none"> <li>▪ Most often used as a monitored metric to help determine productivity or necessity to reach for outside assistance. Can be monitored at the agent, queue and office or facility level.</li> <li>▪ May also be used as an indication that an agent or area is overusing out-dial capability.</li> <li>▪ Monitoring the number of out calls, in conjunction with the specific telephone numbers called, may highlight any abuse.</li> <li>▪ May also be used as a measure of productivity in a contact center where outbound calling is a main function.</li> <li>▪ This should also be reviewed along with the average length of outbound calls.</li> </ul>

Metric	Acronym	Definition	Application	Tips about using this metric
<b>Turnaround time</b>	<b>TAT</b>	<b>The total amount of time between when a request from a customer is made until it is completed.</b>	<ul style="list-style-type: none"> <li>▪ Turnaround time is often used in complex transactions that require subsequent processing after the contact (e.g., insurance applications, mortgage processing).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Turnaround time can be measured at many different process and handling points. It is important to understand how the metric is calculated and the purpose for its use.</li> <li>▪ An organization wanting to measure turnaround time from the customer experience would measure turnaround time from the time the customer contacts the call center until the contact is fulfilled or resolved to the customer's satisfaction.</li> <li>▪ An organization may also choose to only measure the amount of time it takes to resolve the contact internally and not capture the customer experience. In this case, only time processing the contact outside of the customer contact captured. How long does it take to mail a letter after the customer has contacted us?</li> </ul>