Call Centre Work Flow

Zeacom First Call Resolution

Overview

Call Centre

Zeacom Agent Desktop is a one stop suite of products designed to facilitate the operation and supervision of any Company's Service Desks and Call Center.

The service that a company's call center provides to its customers is a measure of that company. It is a primary touch point with current and potential customers, it is de-facto Public Relations, and when it is run effectively, it is advertising, of the best kind – ***reputation***, by word of mouth.

The main users of our products are Call Center Agents and Call Center Managers.

Staff

The Call Center Agent ***(Dan)*** interacts with the general public as a technical assistant on behalf of his company. Dan's job is to answer calls *(phone, IM, email)*. When Dan answers a call, his primary objective *(as directed by the business)* is to resolve the call as quickly as possible to the satisfaction of the caller. This is true for Sales or Support enquiries.

The Call Center Manager ***(Sarah)*** makes sure that Dan can provide the best service he can to customers by seeing that he has access to information and help as and when he needs it.

As his manager, Sarah sets Dan's operating targets. To make sure that Dan and his colleagues have an optimum work environment with attainable and maintainable targets, Sarah measures and compares functional metrics of her call center and agents. Sarah is able to outline areas of potential and actual success & failure.

Sarah can address any trouble areas, and make informed decisions to alleviate potential performance limiting factors that may be affecting her agents.

> The workflow of an **Agent** and the workflow of a **Supervisor** *(of whatever level)* as employees of a call center are what should drive the functionality feature set of the products we are designing for our call center clients.

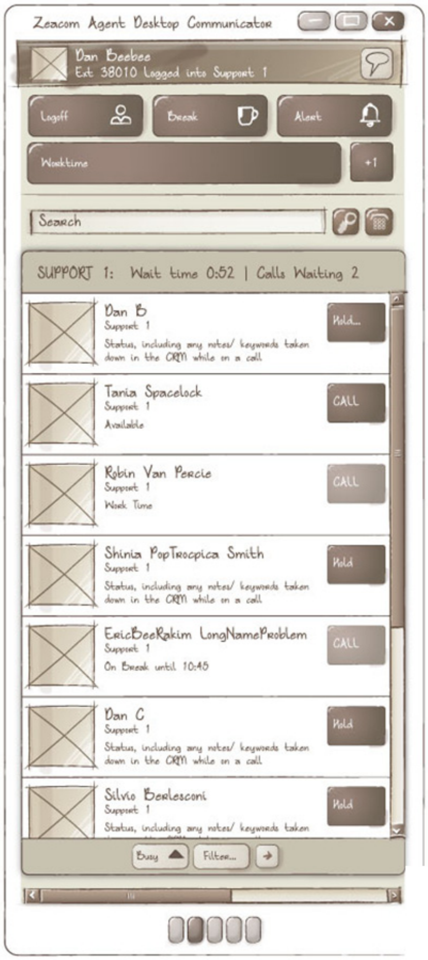
A typical agent workflow utilizes these products:

- **Agent Desktop Communicator**
- **Microsoft CRM**
- **KnowledgeBase**

A Manager or team leader would also need:

- **CCSupervisor**

The First Stage in an **Agents** workflow is taking a call. The Agent Communicator Displays the incoming call ID, which queue it is in, and how long it has been in that queue.



Very preliminary sketch showing Agent Communicator one page view of agents in a queue (left) Roll over view of Agent tile with all Contact options available (right).

Agent Communicator
Agent View shows:

The ***Agents name*** and ***photograph***, the name of the ***Queue***, ***Team*** or ***Group*** he is in, and his ***Current Status.***

The Agents core Call functions: ***Worktime***, ***Alert***, ***Break*** and ***Logoff***

An **incoming call**.

When an Agent is on a call, his status is augmented by displaying the client notes he is typing into **Microsoft CRM**.

Search field for contacts. It is also possible to type a phone number into this field in order to dial it.

The main view also displays a ***Tiles list view*** of the other Agents in his Queue, Team or Group.

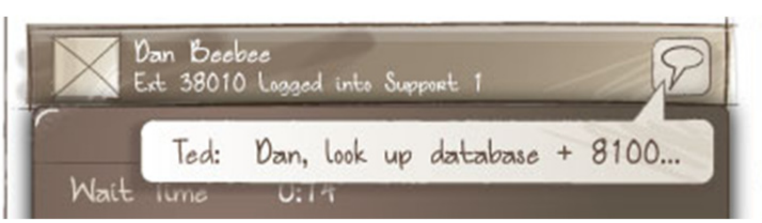
Each Team or Group of Agents will be displayed under a ***Header*** bar with the relevant name shown.

A Queue will have the same ***Header*** bar with the addition of the Queue's estimated ***Wait Time*** and ***Calls Waiting*** figure being displayed.

Each Tile displays the pertinent ***Agent's name*** and ***photograph***, the name of the ***Queue***, ***Team*** or ***Group*** he is in, and his ***Current Status,*** with the addition of buttons which give the Agent the ability to forward calls to the Agent or to that Agents Voice Mail.

There are ***Chat*** and ***Email*** links on each tile. The Chat link will instantly provide an inline input box for fast communication to a colleague.

Incoming Chat messages are indicated via an icon on the Agents Communicator window (below) and via a toaster pop alert from the Windows Task Bar.



When the chat indicator or alert is clicked, a new page is generated which will show the conversation and an input text field.

The Email link will pop a new mail window ready to send to the recipients **Outlook** inbox.

The tile will reflect at a glance the status of the Agent it describes with the same family of colors being used currently on Zeacom's Agent Desktop application.

The list of tiles can be ordered alphabetically, by Agent Class, by Agent Status or by manually dragging and dropping into the user's desired order.

Paging and Expanding

Easy navigation through pages enables the display of any number of Queues and agents.

The communicator can be toggled into a multi-page state *(sketch above)* which is fully re-sizable. In this view all pages can be visible at one time.

The Pages can be organized in any order by the user. The Tiles on the pages can also be sorted in any order.

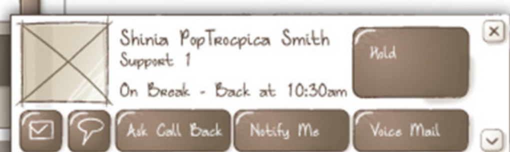
Any user layout and configuration can be saved and set as the default view. Any amount of configurations can be saved.

Incoming Call

A dynamic dialogue pops, displaying:

- *Type of Call*
- *Wait time of the caller*
- *Available information about the caller*

On Rollover
More contact functionalty is available:



- *Email*
- *Chat*
- *Ask for Call Back*
- *Notify me when Agent has finished current call*
- *Hold for agent*
- *Go to Voice Mail*

Paging
Control to show to other panels

The Zeacom suite of products two fixed windows.
Communicator window Expanded

Agent Desktop Communicator in one window, CRM, Knowledge-base, Web Browser and the CCSupervisor available in the other

The Zeacom suite of products, in two fixed windows

Agent Desktop Communicator always in one window, CRM and Web Browser available in the other.

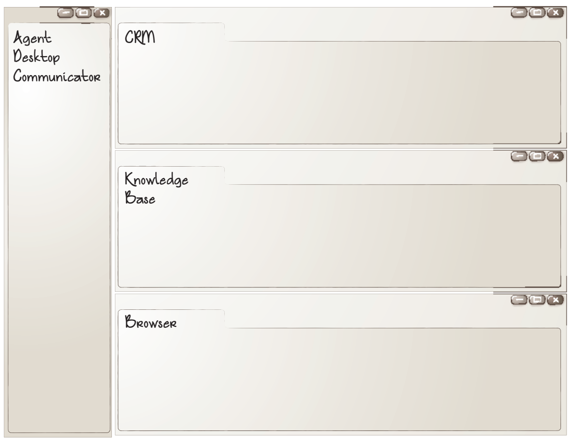
The KnowledgeBase is always visible in the CRM tab.

The Zeacom suite of products in user defined amount of windows

Agent Desktop Communicator always in one window. The User is able to move the other applications from window to window by clicking and dragging the tabs from one window to another.

The Zeacom suite of products two fixed windows.

Agent Desktop Communicator in one window, CRM, Knowledge-base, Web Browser and the CCSupervisor available in the other

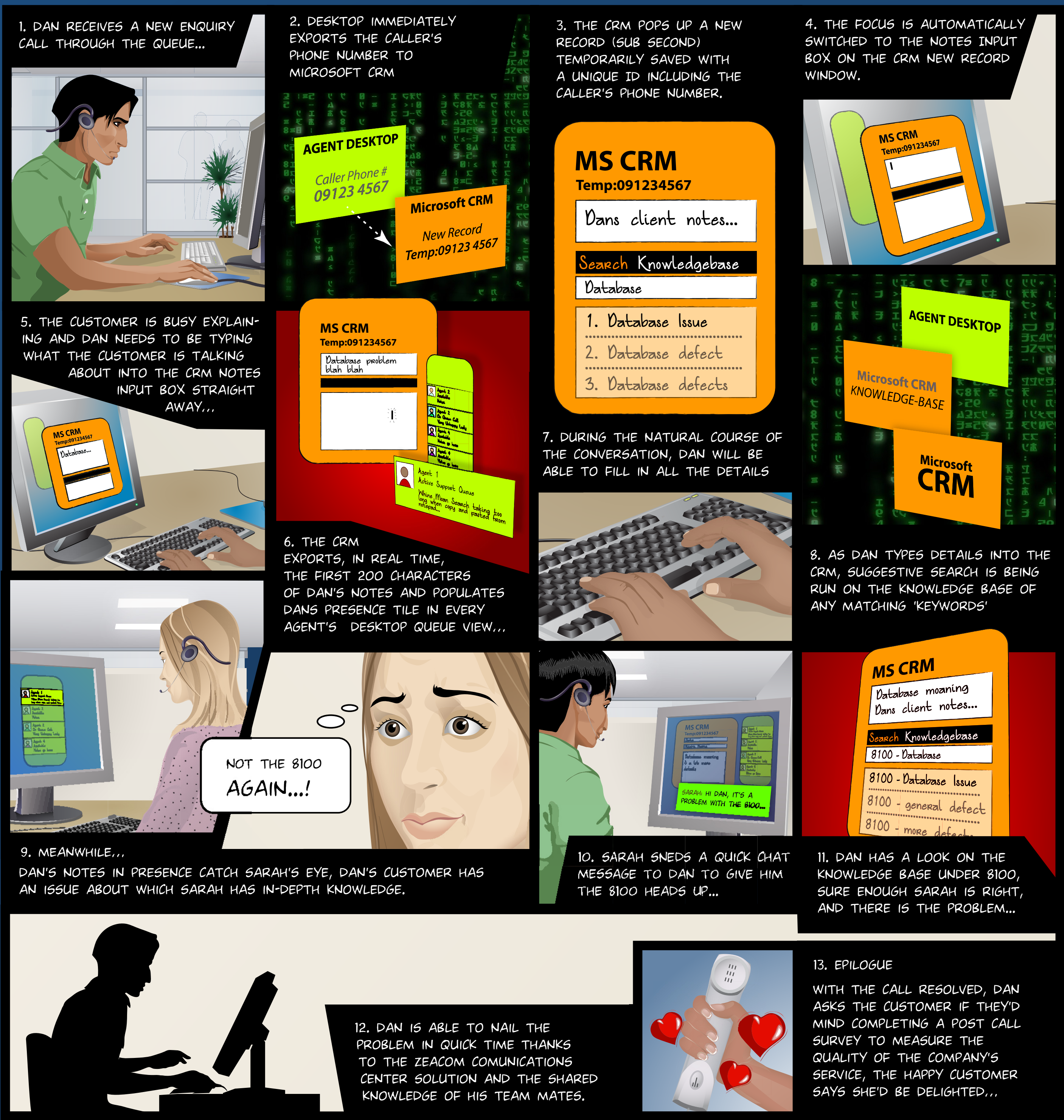


The Zeacom suite of products, each in its own window

Agent Desktop Communicator in one window, CRM, Knowledge-base, Web Browser and the CCSupervisor available in the other zeacom

FIRST CALL RESOLUTION

HOW ZEACOM COMUNICATION CENTER WORKFLOW SHOULD HELP CALL CENTER AGENTS



FIRST CALL RESOLUTION

The Agent accepts the call through Communicator.

The Agent Communicator Displays the incoming call ID, which queue it is in, and how long it has been in that queue.

‘Forewarned is forearmed’

The more information an Agent has about the caller he is about to talk to, the faster the Agent will be at understanding the nature of the call, and the quicker he will be at offering the correct help.

For all enquiries, Sales and particularly Support, the need to comprehend nuances and accurately assess the caller’s issues is essential if a correct solution is to be accomplished quickly and smoothly.

1. Even before a call is accepted from a queue, Zeacom system will have started to help the Agent by promulgating relevant information to the Agent Communicator. The CRM is also being searched for any matching data i.e. the incoming phone number, case number *(as keyed in by the caller)*, the nature of the call…

2. As soon as the call is accepted the CRM instantly pops the most relevant record with focus on the Notes input area.

3. In the case of a New Call, a new customer record is popped with focus on the Notes input area.

4. Any keyed information from the caller will be pre-populated on the record as well as the caller’s phone number/ID and a new case number.

5. With the caller’s details in front of him, the Agent is able to take notes straight away because the caller is already running through the problem that has caused her so much trouble and disruption.

The caller is explaining a database problem…

6. As notes are typed into the CRM the Agent’s Communicator presence Tile is simultaneously updated with keywords/phrases from the conversation notes. This makes the nature of the Agent’s call visible to other members of his team, giving them the opportunity to give help if needed.
7. At the same time the Microsoft Knowledgebase is also searched progressively for the keywords and suggestions are filtered and displayed on the Agents CRM window.

8. If one of the agents’ colleagues recognises the issue that Dan’s notes are referring too, they can send a chat message pointing Dan to a specific knowledge entry.

9. Once the issue is resolved quickly thanks to the help of workmates shared knowledge and an easily searchable knowledgebase, Dan asks the customer to participate in a quick post call survey to measure the quality of the service she has received.

10. The feedback from the survey enables His manager to provide meaningful ROI on her call centre staff and service.

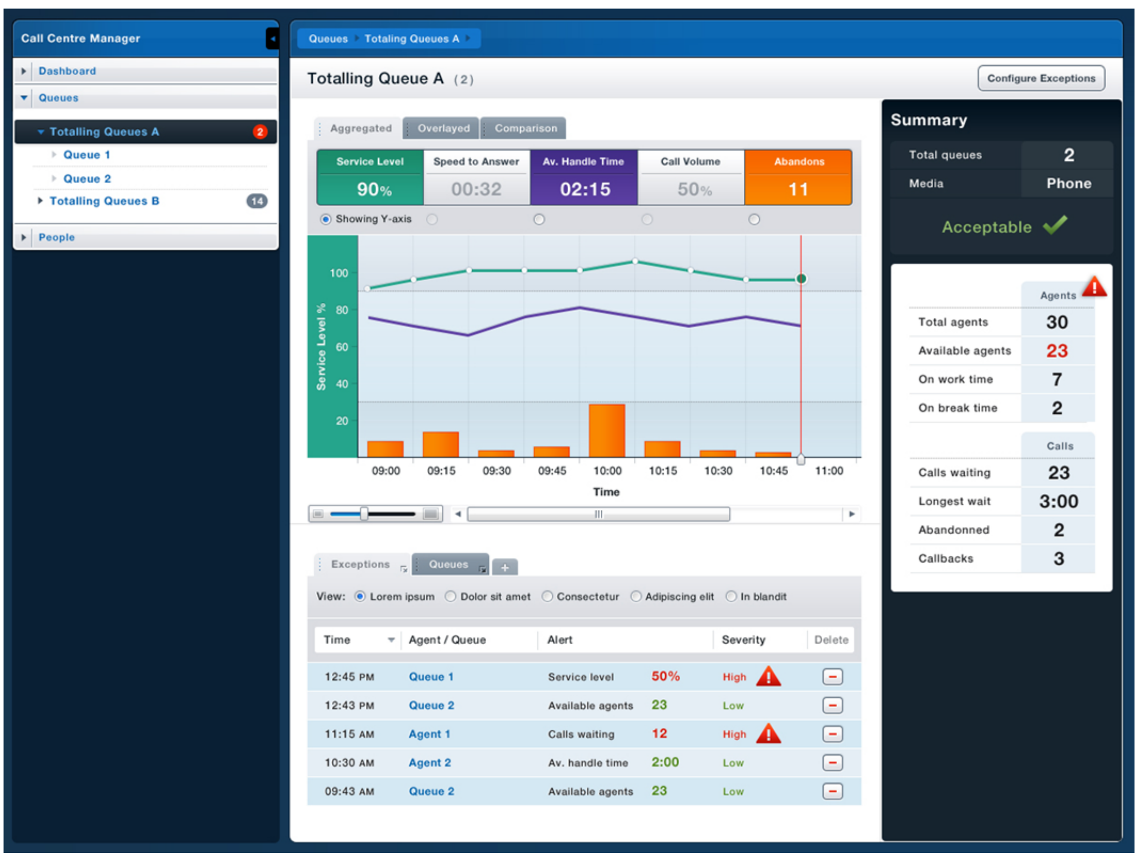
The scenario above is a case flow where the agent is under just enough time pressure. His working environment and tool set are optimised to allow all his concentration to be focussed on the customers' problems rather than his own.

A situation like this does not just happily happen. Continuous Research and study of the workings of any particular call centre needs to be carried out. This research will show patterns of high and low activity, the need for less or more agents at any particular time of the day, and the required skill sets of those agents to optimise the flow of call traffic.

For the Call Centre to be able to function this economically and efficiently, Sarah, the call centre manager, has studied the metrics made available to her through ***CCSupervisor***.

CCSupervisor

Highly visible, easy to read, graphically rendered real time reporting on the major metrics across all Queues, Queue Groups, Agents and Teams, show from minute to minute how a call centre is reacting to the work load.



Sarah can see from the information shown above, the general health of her call center.

The ***Service level*** is high, the ***average handle time*** is low enough, and the ***Abandon rat***e is acceptable.

However, Sarah can see that there was an increase in the abandon rate at 10:00am just by glancing at the graph.

By clicking the comparison tab, Sarah can see which Queues were causing the problem at that time.

By drilling down to the single problem Queue view, she can discern if there were enough agents active at that time, how many were on break, what were the nature of the calls, were they taking longer to resolve than expected, if so, were the agents of a sufficient skill level, were there any IT problems or outages… etc.

Sarah can then Export a ***snapshot report*** of the call center for that interval of time.

She'll be able to compare the report with previous reports of the call centre for that time period. By examining comparative metrics in this way, over time, patterns will start to emerge, allowing more and more precise day to day scenarios to be forecast and planned for. Resources can be better assigned and work flow spikes that disrupt call center productivity will be minimised.

The CCSupervisor software is a complete analytics & reporting package

Configurable Real time ***Health Check*** backed up by ***Contextual Reports***.

In ***Queue view***, Sarah can easily schedule and run one touch snap shot reports on any or all metrics she is interested in from that Queue, whether it be Abandon rates, Average Handle time, call volume etc.

In ***Agent View***, Sarah can compare reports showing total work-time taken by the three new agents she has just taken on for the past two weeks.