

Contact Center Optimization Assessment Menu

Objective: Assess various aspects of human and operational performance in order to provide clients with information and recommendations for solutions to enhance customer satisfaction and human and operational performance.

TOPIC	OVERVIEW
Staffing	<ul style="list-style-type: none"> ➤ Review processes for recruiting, interviewing, and hiring including: <ul style="list-style-type: none"> - Skill determination and assessment - Model or target employee - Current challenges in this area - Tracking turnover and reasons why - Job descriptions ➤ Review processes for forecasting and anticipating staffing needs from hiring perspective ➤ Overview of scheduling tools and scheduling philosophy (how often do shifts change; part time vs. full time staffing; flex time) ➤ Review of processes for tracking forecasting and staffing performance
Training	<ul style="list-style-type: none"> ➤ Overview processes ➤ Structure of the training organization and responsibilities ➤ Interaction between trainer and supervisor staff ➤ Interaction between trainer and agent (from start through maintenance) ➤ Typical training timeline ➤ Curriculum analysis ➤ Testing and assessment practices and processes ➤ Skill set of individuals in training roles (what does the background/experience of the individual responsible for training look like)
Quality Assurance	<ul style="list-style-type: none"> ➤ Review QA organization roles and responsibilities ➤ How QA is defined, tracked and measured ➤ Communication of QA issues to/from those who are impacted or who can impact ➤ Processes for correcting QA issues and tracking progress against correction plans ➤ Review call-monitoring process (frequency, monitoring criteria, scoring, monitoring tools, corrective action and latest results)
Incentives & Advancement	<ul style="list-style-type: none"> ➤ Employee recognition and reward programs ➤ Retention initiatives ➤ Development and career path opportunities

<p>Operations Management</p>	<ul style="list-style-type: none"> ➤ Overview of operations team and structure along with responsibilities ➤ Key performance indicators/metrics (what are they and how are they tracked and measured with what frequency) ➤ Processes and practices for performance management and development ➤ Corrective action process ➤ Communication processes between agents and supervisory staff
<p>Management Reporting</p>	<ul style="list-style-type: none"> ➤ Goal setting ➤ Overview reporting tools used, reports generated and from what systems ➤ Identify reports that are critical to managing the business ➤ Identify reports known to be critical but that aren't being used ➤ Identify parties responsible for utilizing data ➤ Identify process to provide data back to key personnel
<p>Company and Program Overview</p>	<ul style="list-style-type: none"> ➤ Overall structure and personnel overview (key players Facilitador, LLC will interact with including roles and responsibilities) ➤ Company mission/vision ➤ Strengths ➤ Short term and long term strategic goals ➤ Challenges to meeting short and long term goals ➤ Wellness of culture and key employee morale ➤ Review at high level current measures of success/key performance indicators and current gaps in actual to desired performance ➤ Overview of program to include: <ul style="list-style-type: none"> - Call types - Customer types - Hours of operation - Volumes - Services (calls, faxing, email etc ...)
<p>Facility Design</p>	<ul style="list-style-type: none"> ➤ Center capacity ➤ Center layout ➤ Agent placement in relation to resources such as supervisors, trainers, tools/systems.