

Making the Back Office Pay

Measuring and increasing productivity while reducing costs

With the rise of social media, consumers are increasingly able to share their likes and dislikes about their customer-company interactions with others. Customers don't necessarily care whether their requests and issues are handled by someone in a contact center or a back office. They simply want problems solved as quickly and accurately as humanly possible – with the help of all available technology.

While it's ideal for the back office to be invisible to the customer, supervisors and managers should have a clear and detailed view into productivity metrics and drivers. After all, if contact center operations are effective but the back office is slow to respond, the customer experience can suffer. Customers may not see very far beyond their contact center interactions, but the quality of their experiences is indirectly influenced by the effectiveness of back-office employees' performance.

Inefficiencies in the back office drive up costs on several levels. There's the risk of customer attrition – and lost business opportunities – when customers become disgruntled by processing delays, billing errors and other miscues that originate downstream. And suboptimal staffing, the most significant financial drain, results from the inability to forecast, schedule and track both the number and qualifications of employees required to effectively run a back office.

The Front End Gains of a Productive Back Office

When organizations optimize back-office systems, processes, and ultimately employees' performance, the benefits carry over to customer interactions. By better aligning back-office employees to customer service requests, organizations can relieve the contact center of a significant percentage of call volume and the associated costs, and also contribute to a better customer experience.

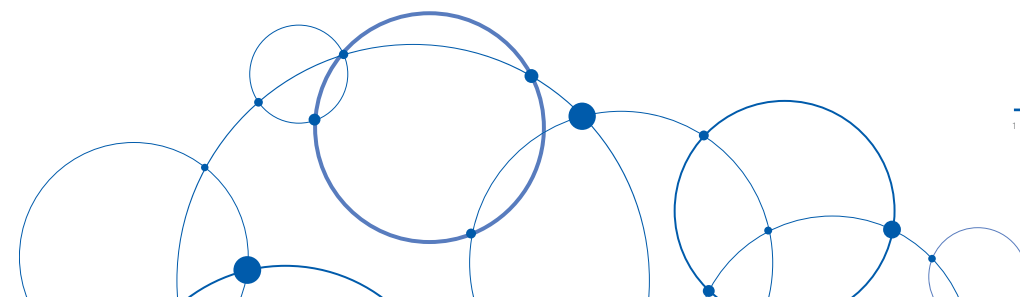
Studies support the bottom-line advantage of the links between back-office efficiencies and both customer satisfaction and loyalty. McKinsey reports that improving back-office efficiency and effectiveness from average- to top-quartile levels can increase an organization's net margin by two percentage points.¹

Improved Staff Utilization through Predictive Analysis

A solution that offers full workforce optimization capabilities – including workforce management, performance management and quality management – equips organizations to improve strategic planning by scheduling and maintaining both the right number and types of back-office employees. Scheduling analysts can experiment to find the staffing scenario that best accommodates planned or unplanned events. By using automated analytics to test different scenarios, they're able to easily manipulate the variables to determine the optimal staff and resource configuration for meeting a specific set of business needs.

One challenge of balancing staff with transaction demands is the variation in response times for different types of work. When tasks, such as claims processing, order fulfillment, and other back-office activities are completed at multiple sites or outsourced locations, solving this equation becomes even more complex. With the ongoing need to be agile in the face of both predictable and unexpected staffing changes, flexible forecasting and scheduling capabilities – as well as intraday performance evaluation and schedule tracking – are invaluable for attaining optimal efficiency and effectiveness.

¹ McKinsey Quarterly, January 2010



Continuous Employee Performance Improvement

Maintaining the right number and types of workers to service the business is just the starting point for effective workforce optimization. Focused performance management and coaching will help organizations align employees to key goals. Automated capabilities allow managers and supervisors to more accurately plan, evaluate and manage not only the performance of back-office employees, but also the workers who service both the contact center and the back office.

A worker's productivity level can be measured and reported, including the number and duration of tasks handled as well as the amount of time spent in productive versus unproductive activities. Dashboards and other reports compare outcomes to targeted values for key performance indicators. When results fall below preset thresholds, automated alerts can prompt supervisors and initiate online coaching that provides remedial instruction. Pre-defined coaching specific to each learning need provides immediate, consistent guidance, which is reinforced by a performance improvement plan that tracks the time and effectiveness of completion.

Capabilities for evaluating employees' performance can also empower them. High-performing workers may be given the option to bid on preferred shifts and request schedule changes within selected parameters, helping to raise morale and increase retention. The benefits to the business are reduced administrative costs and increased efficiency that come with automated schedule changes and notices via email and screen pops. In addition, tools that allow managers to monitor real-time and historical schedule adherence, and track actual to targeted employee performance with performance scorecards, provide insightful feedback that helps organizations get the best return on their staffing decisions.

Ultimately, overall performance can be more closely aligned with business goals, and back-office employees and other workers are individually empowered to achieve specific objectives in support of these goals.

A Closer Look at Employee and Operational Performance

Desktop analytics technology allows organizations to keep track of employee productivity and task performance. Many businesses face challenges measuring the duration of certain back-office tasks and have little information on process flow and employee productivity. By measuring targeted desktop activity and making this information available alongside other performance measures, organizations are able to truly gauge operational effectiveness.

UC-Enabled Insight into Staffing and Problem Resolution

Workforce optimization technologies contribute to back-office productivity by helping to automate the workforce planning process, while consolidating staff and increasing overall operational performance. The most advanced software solutions deploy unified communications (UC) and collaboration across the contact center, the back office, and into the rest of the enterprise to deliver increasing gains in workforce efficiencies through faster problem identification and resolution.

Embedded rich presence, empowered by UC, allows workers to quickly find and engage the most appropriate resources to solve a particular problem. With a highly versatile suite of contact and collaboration tools at their disposal - including instant message (IM), email or voice - more efficient issue management and resolution is just a few clicks away. Managers, supervisors and staff can easily collaborate on service level and other staffing topics that are central to productivity.

Solution Essentials for Optimizing Back-Office Productivity

Workforce optimization provides better insight into tasks and employees, and the forecasting, scheduling and tracking flexibility needed to reduce the number of staff required to meet business objectives. The most comprehensive solutions:

- **Conduct a quick scenario analysis** to identify the right staffing profile for effectively responding to unexpected events
- **Optimize tasks across contact centers and back offices** to create a centralized plan for effectively and efficiently servicing customers
- **Offer multi-site scheduling capabilities** that provide a global perspective for environments that share tasks across sites
- **Enable convenient workforce data sharing** with outsourcers to gain a complete, accurate view of activity
- **Capture data on tasks and employees** to effectively optimize and report on operations using desktop analytics
- **Evaluate employees** by monitoring real-time and historical adherence to work schedules, to inform corrective actions related to staffing plans and employees' performance
- **Track actual to targeted employee performance** with scorecards that help employees understand and optimize their performance, and help managers identify areas for improvement
- **Provide dashboards and reports** that measure an organization's and individual employees' overall productivity
- **Initiate online coaching** when an employee's performance falls below a set threshold, to improve individual and overall operational effectiveness
- **Empower employees** to manage their own schedules within preset parameters to increase morale and retention

Conclusion

Workforce optimization solutions can increase the productivity of back-office operations and decrease costs. Specifically, they help to improve customer service levels while decreasing required staffing through predictive modeling. These solutions also empower and improve employees' performance through automated coaching and by allowing them to manage their own schedules using pre-defined rules. Finally, detailed process and employee productivity insights may be gathered through screen analytics.

The ultimate reward of an automated workforce optimization solution is consistently quicker, more accurate response to customer queries. Organizations are able to cultivate loyalty through long-term satisfaction - without adding resources or budget.

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