The Purpose and Goals of a Call Center Audit
Cloud-based Approaches Today

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Cloud-based Approaches Today

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Since 2003 Colin has lead The Taylor Reach Group, Inc. (TRG) to success in call center and management consulting. He is an author and a frequent speaker on customer service, contact centers, Operational Innovation, CRM, sales, direct marketing and team building.

Audit Defined. The dictionary defines an audit as "a methodical examination or review of a condition or situation; to examine carefully for accuracy with the intent of verification; and to consider in detail and subject to analysis in order to discover essential features and meaning."

So what we are really talking about is a thorough examination with a high degree of accuracy and validation. If you look at it in this way, an audit is really no different than your annual physical with your doctor. I know that I hope the doctor is thorough, accurate and validates his findings before he sends me for surgery or a similar procedure.

So we get our annual physical to ensure that we are in good health, and to identify and hopefully mitigate any risks to our health. But what about our call centers?

Why Audit, and Factors Driving Audit in Call Centers

What can an audit or call center assessment really achieve? Like a doctor's visit, it can help us to determine if we have a problem or address symptoms, or like our annual physical, it can confirm that we are in good health, but even then we need to do things to stay healthy.
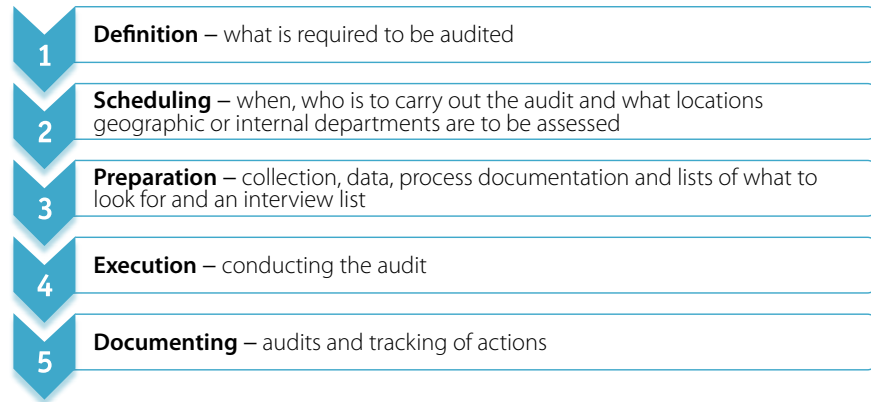
Given the competitive environment, reducing budgets and increasing costs, along with a unique and complex environment, it becomes almost mandatory for a call center for conduct an audit biannually or annually, at least.

Benefits of Conducting Regular Audits

We have seen centers achieve their business, compliance and/or organizational requirements, and we have seen organizations dramatically improve the service quality performance, significantly reduce their costs and exponentially increase productivity and customer satisfaction.

The Audit Assessment Process

1 **Definition** – what is required to be audited

2 **Scheduling** – when, who is to carry out the audit and what locations geographic or internal departments are to be assessed

3 **Preparation** – collection, data, process documentation and lists of what to look for and an interview list

4 **Execution** – conducting the audit

5 **Documenting** – audits and tracking of actions

Good health and prescription for better performance…now I am sounding like a Viagra ad. But yes, you can have it all.

If I were to pick 3 of the most valuable benefits, here is what I would list:

1. Greater and conscious control of the destiny of the call center by senior management.
2. Unless you tread on the wheel of continuous improvement, backsliding or stagnation at best is the result—regular audits will help you stay on top!

3. Holistic measurement (not simply operational metrics) comparing period to period is necessary to provide relevancy to the center, the agents, the organization and its customers.

How Do We Conduct an Audit?
Why Snapshotz Is Revolutionizing the Way Call Center Audits Are Conducted

A thousand moving parts is an apt description for a call center audit. When you look at a call center you need to understand what is happening in the center, how processes, technologies and information are connected and interdependant. You need to look "under the hood" to see what the dependencies and prerequisites are and to see correlations. You have to match objectives to performance and check if these were realistic measures to support decision making into the future.
Historically, this approach required 10-plus man-days onsite examining hundreds of pieces of data. Post-analysis phase, again, a number of weeks for report preparation and presentation. But at the end of the process, we had invested hundreds of hours and generated a

Factors Driving Assessment

Business 101	**Verification and setting priorities - Assessment, Planning and Objective Setting**
Organizational and Competitive Pressures	**Better customer outcomes, increasing revenues, cost reduction, 'Doing More for Less'**
Regulation	**Regulatory bodies + the economy have highlighted the importance to organize and improve performance control and compliance systems**
Environment Uniqueness	**Customer service centers are uneven energies of people process + technology moving at an uneven pace**
Environment Complexity	**Several levers can be manipulated to achieve customer and stakeholder objectives - Need for constant review and prioritization**

70- or 80-page report with 80 or 90 specific recommendations to improve the center's performance, productivity, alignment, technologies and processes or cost efficiency. But, of course, all of this costs money… $40,000 to $50,000 or more.

Once there was a report in hand, the next steps were easy. The organization had the recommendations and could determine which ones they wanted to implement, and then easily build a business case and ROI model to support that decision. The largest challenge wasn't getting a client to implement recommendations, which has happened with every audit we have done. The challenge has been to get clients to complete the audit in the first place.

The problem for many is how to fund the original audit cost, as it was difficult to determine what the outcome might be and, thus, return, especially if we are talking $50K. Many an audit proposal has died because we weren't psychic and couldn't see the future.

This is bit of a "chicken and egg" situation. Organizations considering an audit know or suspect that they need a tune-up, and they sense that, if they knew what to do and the costs required, implementing the solution would be easy.

Today there is an alternative to the high-cost consultant lead assessment, and that is a cloud-based or hosted audit tool.

With Snapshotz Online, you simply log in via your browser and access the application. Snapshotz is structured as a detailed questionnaire containing over 700 individual data-

points related to call center operations and management, including: Operational Metrics, Customer Relationship Management, Contact Center Structure, Corporate Objectives and Strategy, Health and Safety and Employee engagement.

For many organizations, the ease and lower cost associated with a cloud-based audit, when combined with the ability to track center versus center and year-over-year changes and improvements, mean that cloud-based audits are here to stay. ●

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About Contact Center Pipeline

Contact Center Pipeline is a monthly instructional journal focused on driving business success through effective contact center direction and decisions. Each issue contains informative articles, case studies, best practices, research and coverage of trends that impact the customer experience. Our writers and contributors are well-known industry experts with a unique understanding of how to optimize resources and maximize the value the organization provides to its customers.

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