



Report Summary

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“What gets measured, gets improved”



Agent Outgoing Calling Pattern

Overview

Identifies agents who made more than five calls to the SAME telephone number during the day. Call counts are highlighted in **red** if more than five calls have been made during the business day. Call counts are not accumulated from previous days. This report can also be run weekly to indicate if more than 25 calls have been made during that work week.

This report can be customized to eliminate identified business numbers to reduce the length of reports.

Description of Fields

Date: Date of report

WG Name: Name of Work Group

Agent: Employee name

Extension: Extension that made the call

Total Calls: Total number of calls made to the target number (six or more)

Target Num: Telephone number called by extension identified

Total Duration: Total time spent on calls

Avg Call Dur: Average duration of total calls to same target number

Purpose

This report is used to **identify personal calls**.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.

Worst Case Answer Time Performance

Overview

This report shows the maximum (worst case) answer time in each 15 minute interval. It also displays the call volume and average call duration for each interval.

Description of Fields

The graph on this report shows the "Worst Case" answer time performance for all incoming calls. The green "goal" line is set for one additional ring above the company-designated number since agents may not see/hear the first ring due to processing delays in the phone system. This is normal for most phone systems.

This report requires a manager to identify goals/thresholds.

Date: Date of report

Work Group: Name of Work Group

Extension: Extension that received the call

Time: 15 minute time interval

Max # of Rings: Average number of rings for that interval

STD Ring Intv: Standard Deviation (STD)¹ of ring time (seconds) during the interval

of Calls: Number of incoming calls during the interval received at that extension

Avg Dur: Average call duration during the interval received at that extension in seconds

Total Dur: Total duration of calls received during that time interval in minutes

¹ Basically, STD can help you find the story behind the data. The standard deviation will tell you how diverse the ringing intervals are for each time period. The higher the value, the greater the variation. A high variation indicates a lack in answer time performance.

Purpose

Use this report to track answer time performance throughout the day. Peaks in answer times and an associated increase in call volume could indicate potential staff and/or scheduling problems. Use the Attendance Report to help resolve some of these problems.

This report can also be used to indicate a malfunction in the telecommunications system. If unanswered calls are not being routed to voicemail after the designated number of rings, the set-up functions on the identified extension should be verified.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



VoiceMail Calls that were not Returned

Overview

This report lists the agents who did not return voicemail calls received for the day. Since there is no way to determine the contents of the voicemail, it cannot always be determined that the voicemail needed to be returned. For example, if client leaves information, agent is returning call to another number or voicemail is forwarded to another employee.

Generated voicemails (replies) are eliminated from this report for the prior 30 days.

This report requires company's identification of client phone numbers.

Description

Date: Date of report

WG Name: Name of Work Group

Agent: Name or number of agent who did not return the voicemail call

Return Call Number: Number of voicemail caller

Date: Date of voicemail call

Time of VM Call: Time voicemail call was received

Client: Identified name of client, if any, who made the phone call

Target Number: Extension number that received the voicemail call

Purpose

Use this report to help determine agent's voicemail response performance **trends**. It is not a conclusive indicator for actual voicemail response performance since it cannot be determined if the voicemail needed to be returned.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.

VoiceMail Performance Summary

Overview

An at-a-glance review of agent voicemail activity.

Description

This graph shows voicemail calls returned by agent, comparing data of voicemail calls, voicemail calls returned, generated voicemail calls and voicemail calls not returned.

Date: Date of report

Work Group: Name of Work Group

Agent: Agent number or name

Extension: Extension of agent

of VM Calls: Number of voicemail calls

Returned Calls: Number of returned voicemail calls

% Returned Calls: Percent of returned voicemail calls

Generated VM Calls: Number of calls generated by voicemail

% Generated Calls: Percent of calls generated by voicemail

Not Returned Calls: Number of voicemail calls not returned

% Not Returned Calls: Percent of voicemail calls not returned

Purpose

This report is used to identify individual agent's response to voicemail calls.

Suggested Report Interval

Weekly

Note that reports can be modified according to your organization's standards or thresholds.

Call Summary

Overview

This report shows the incoming and outgoing calls by agent each day. The percent usage (Agent Busy) is the total call duration (incoming and outgoing) divided by the number of agent hours scheduled. Total agent usage can be accurately determined since there is no "wrap-up time" to add to the daily call duration. For this reason, the total usage percentage is not exaggerated.

Description of Fields

The graph shows the usage (% of Work Time Busy on Calls) for each extension receiving calls.

Date: Date of report

Group: Identifies Work Group of agent/extension

Date: (for weekly and monthly reports)

% Usage: Time spent on calls divided by the total hours worked based on Attendance Report data, used to identify agent's time on phone

Time Worked: Hours worked this day, based on Attendance Report data

Caller Name: Agent name or number who placed or received calls

Extension: Extension that made or received call

Incoming Calls: Number of incoming calls for the day

Incoming Total Dur in Min: Total incoming call duration for the day

Outgoing Calls: Number of outgoing calls for the day

Outgoing total Dur in Min: Total outgoing call duration for the day

Total Calls: Number of incoming and outgoing calls for the day

Total Duration in Min: Total incoming and outgoing call duration for the day

Purpose

This report is used to identify low performance agents.

Suggested Report Interval

Daily, Weekly, Monthly

Note that reports can be modified according to your organization's standards or thresholds.



Attendance Report

Overview

This report shows individual agent's schedules.

Description of Fields

Date: Date of report

Morning Work Time

Morning Break

Late Morning Work Time

Lunch

Afternoon Work Time

Afternoon Break

Late Afternoon Work Time

Purpose

Use this report to verify agent's timed activities, ensuring agents are adhering to schedule and timing equipment is being used correctly. This report can also be used to validate reports received from the company's time clock system.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



Performance Summary Report by Client

Overview

This report indicates response to client communication.

This report requires company's identification of client phone numbers.

Description of Fields

Date: Date of report

Client: Client name or number based on Caller ID and dialed digits

Direction: Direction of calls (incoming and outgoing)

of Calls: Number of calls for this direction as indicated

Main Number: Number of incoming calls that originated from the client calling the main number of the organization

of Direct Dial: Number of incoming calls that client called directly to extension

Avg # of Rings: Average number of rings before the incoming calls were answered

Calls From IVR to VM: Calls that the client initiated via the IVR (Interactive Voice Response or automated answering system) that went to voicemail

Ring No Answer VM: Calls that went to voicemail but were never answered by the voicemail system

#of Fwd to VM: Number of client (as identified) calls that went to voicemail

of Ring No Answer: Client (as identified) calls that were not answered

of IVR only Calls: Client (as identified) that went to the IVR (Interactive Voice Response or automated answering system) and the client disconnected

Avg VM Response: Average number of client (as identified) calls that went to voicemail and were returned

Purpose

Use this report to track response time to client's calls. Portions of this report may be presented to individual clients to validate how their calls are handled as well as address client's concerns.

Suggested Report Interval

Weekly, Monthly

Note that reports can be modified according to your organization's standards or thresholds.

Performance Detail Report by Client

Overview

This report indicates individual agent's response to client communication.

This report requires company's identification of client phone numbers.

Description of Fields

Date: Date of Report

Client: Client name or number based on Caller ID and dialed digits identified

Agent: Name or number of agent who handled client's calls

Direction: Direction of client class (incoming and outgoing)

of Calls: Number of client calls for this direction

#Main Number: Number of incoming calls that originated from the client calling the main number of the company

#of Direct Dial Calls: Number of incoming client calls dialed directly by client to identified extension

Avg # of Rings: Average number of rings before the call was answered

Calls From IVR to VM: Calls that the client initiated to the IVR (Interactive Voice Response) that went to voicemail

Ring No Answer VM: Client calls that went to voicemail and not answered by the voicemail equipment

of Fwd to VM: Number of client calls that went to voicemail

of Ring No Answer: Number of client calls that were never answered, a low number of rings in this column usually represents that the caller hung up before the call was answered (abandoned call).

#of IVR Only Calls: Client calls that went to the IVR and client disconnected

Avg VM Return: Average number of client calls that went to voicemail

Purpose

Use this report to track agent's performance handling client's calls.

Suggested Report Interval

Weekly

Note that reports can be modified according to your organization's standards or thresholds.



Incoming Call Volume by Work Group and Hour

Overview

This report shows the Work Group call volume for the day.

Description of Fields

The graph of this report shows the daily call volume averages by working hour, beginning with the first call and ending with the last (as agents are logged in).

Date: Date of report

Work Group: Name of Work Group

Hour: Hours represented in abbreviated military time

Calls: Number of calls during indicated hour

Purpose

To assist in resource scheduling efforts, use this report to identify busy hours for each Work Group.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



Incoming Call Volume Comparison by Work Group and Hour

Overview

The graph on this report compares the daily call volume between Work Groups. The text data is the same as that on the "Incoming Call Volume by Work Group and Hour" report.

Description of Fields

The graph of this report shows the daily call volume averages by working hour, beginning with the first call and ending with the last (as agents are logged in).

Date: Date of report

Work Group: Name of Work Group

Hour: Hours in military time

Calls: Number of calls during indicated hour

Purpose

To assist in resource scheduling efforts, use this report to compare busy hours between each Work Group. Calls may be rerouted where possible. This report may go to upper level management.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



Outgoing and Incoming Call Summary Report

Overview

For Work Groups that have Sub-Work Groups. This report totals both incoming and outgoing calls by Sub-Work Group.

This report requires identification of extensions within a Sub-Work Group.

Description of Fields

Date: Date of report

Group: Name of Work Group or Sub-Work Group

of Calls: Total incoming and outgoing calls

VM Calls: Number of incoming calls routed to voicemail

Avg Talk Time in Seconds: Average time of total incoming and outgoing calls

Avg Dur in Seconds: Average duration of total incoming and outgoing calls

Total Dur in Minutes: Total duration of outgoing and incoming calls by Sub-Work Group

Purpose

Use this report to assist in scheduling efforts and coverage between associated Work Groups.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



Outgoing Call Summary Report

Overview

For Work Groups that have Sub-Work Groups. This report totals outgoing calls by Sub-Work Group.

This report requires identification extensions within a Sub-Work Group.

Description of Fields

Date: Date of report

Group: Name of Work Group (and Sub-Work Group, if any)

of Calls: Total number of calls made by Sub-Work Group

Avg Talk Time in Seconds: Average talk time of all outgoing calls¹

Avg Dur in Seconds: Average duration of all outgoing calls¹

Total Dur in Minutes: Total duration of all outgoing calls

Purpose

Use this report to monitor outgoing calls between Sub-Work Groups to assist in coverage and scheduling efforts.

Suggested Report Interval

Daily

¹The difference between the "Talk Time" compared to the Avg Dur field includes the ring time for that call.

Note that reports can be modified according to your organization's standards or thresholds.



Outgoing Call Detail Report

Overview

This report shows the total number of outgoing calls made by each agent, per Work Group and Sub-Work Group (if any).

Description of Fields

Date: Date of report

Group: Name of Work Group

Sub-Work Group: Name of the Group within the Work Group (if any)

Agent: Name or number of Agent (as tied to extension)

Called Number: Outgoing number dialed

of Calls: Number of calls

Avg Talk Time Sec: Average Talk Time in Seconds (in seconds)¹

Avg Dur in Sec: Average duration of calls in seconds¹

Total Dur in Sec: Total duration of calls (in seconds)¹

¹The difference between the "Talk Time" compared to the Avg Dur in Sec and Total Dur in Sec fields includes the ring time for that call.

Purpose

Use this report to identify outgoing call performance by agent.

Suggested Report Interval

Daily

Note that reports can be modified according to your organization's standards or thresholds.



Office Performance Summary

Overview

Summary of all agents' communication activities by Work Group.

This report requires a manager to identify goals/thresholds for each Work Group, Sub-Work Group or Agent.

Description of Fields

Date: Date of report

Work Group: Name of Work Group

Sub-Work Group: Name of Sub-Work Group

Agents: Number of agents in Sub-Work Group

STD: Standard deviation (STD)¹ of Sub-Work Group

Trend: Trend of identified Sub-Work Group

Answer Time: Combined answer time

% Busy: Combined busy time

% Returned VM Calls: Combined VM Calls returned

Total Hours Worked: Combined hours worked (not including breaks, lunch)

STD: Standard deviation (STD)¹ of Sub-Work Group

Trend: Trend of identified Sub-Work Group

Total Calls: Total incoming call duration

Total Inc Calls: Total incoming calls

Total VM Calls: Total calls routed to voicemail

Average Lunch Time: Combined average lunch time

STD: Standard deviation (STD)¹ of Sub-Work Group

Trend: Trend of identified Sub-Work Group

Total Duration min: Total outgoing call duration

Total Out Calls: Total outgoing calls

% VM vs Live Calls: Percent voicemail calls vs. live calls

Avg Agents per hour: How many agents available per hour

Purpose

Use this report to determine which detail reports to review. Items in red are out of the limit of custom thresholds.

Suggested Report Interval

Monthly

Note that reports can be modified according to your organization's standards or thresholds.



¹ Basically, STD can help you find the story behind the data. The standard deviation will tell you how diverse intervals are for each time period. The higher the value, the greater the variation. A high variation indicates a lack in performance.

Note that reports can be modified according to your organization's standards or thresholds.