7 Contact Center Metrics Every Enterprise Should Be Measuring

Learn how to enrich the omnichannel customer experience

The Importance of Measuring Contact Center Performance

Delivering a best-in-class customer service experience has become increasingly complex as empowered consumers, new technologies, and a choice of channels have dramatically altered the contact center environment. The stakes in this race for satisfied customers couldn't be higher. Failure to provide an effective omnichannel approach that meets consumers' desire for immediate service could result in a public relations backlash—or worse still, lost revenue and loyalty—as customers broadcast their experience with your contact center across social media.

But how do you know if you're keeping up with customer expectations, or falling behind? What's the best way to measure your contact center's performance to ensure it's efficient and productive enough to meet customer demand? How can you gauge whether you've effectively aligned your people, processes, and technology with the needs of your customers and agents, as well as your business objectives?

The answers exist in the myriad of reports and surveys you may already have in place—but only if you understand how to cull the most vital data from these sources.

Choosing Metrics Based on Business Initiatives

Omnichannel service is a multifaceted endeavor, and measuring your success within and across channels can help you achieve a seamless experience that in turn increases customer satisfaction levels.

But to successfully drive improvements, metrics must mirror your organization's strategic goals. While each enterprise will measure a unique combination of factors, several indicators are common to all contact centers looking to enhance customer service.

This paper outlines seven key performance indicators (KPIs) that came to light based on extensive research into metrics employed by leading contact centers within the International Customer Management Institute (ICMI) community of practitioners. You'll discover not only the suggested indicators to measure but also where to source the necessary data, how to calculate metrics, the relative importance of metrics, and more.

With these KPIs as a guideline, you can develop or refine an ongoing measurement strategy capable of providing insight into your contact center practices and ways to help your enterprise become more proactive in warding off potential contact center pitfalls.

39%
of contact center leaders struggle to identify and measure key performance indicators

Contact Center Support by Channel

Channel	Percentage of Contact Centers That Support the Channel
Inbound phone to live representatives	92%
Email	88%
Outbound phone	80%
Self-service: Web and online	75%
Postal mail	65%
Self-service: Phone and IVR	64%
Social networking sites	59%
Ratings and customer feedback sites	54%
Mobile device apps	52%
Self-service: Online for order tracking	49%
Online chat, text-based	47%
SMS and text messages	37%
Video chat	22%

Executive Summary

ICMI studied leading contact centers to establish which factors they measured to ensure high levels of customer service. The institute identified the following KPIs, which range from the tactical to the strategic:

1. Workload Forecasting

2. Agent Accessibility

3. Resource Accessibility

4. Resolution Quality

5. Employee Satisfaction

6. Customer Satisfaction

7. Strategic Value

Within these broad categories are three types of measurements. Primary metrics are the main factors you'll likely want to concentrate on. Supporting metrics provide additional data that can help illuminate the overall category and further refine tactics. And emerging metrics provide the most effective indicators being adopted by high-performing contact centers.

Each metric is intended to help you establish a baseline, which you can then use to measure performance over time, that reveals how well you're delivering on the seven KPIs for contact centers.

Most-Used Contact Center Metrics

Metric	Percentage of Contact Centers Measuring It
Service level/Response time	95%
Number of contacts handled	89%
Contact quality	88%
Customer satisfaction	87%
First contact resolution	73%

Workload Forecasting

An accurate workload prediction makes it easier to deliver more efficient, consistent service that translates into heightened customer satisfaction levels. But forecasting becomes a greater challenge when mobile and social interactions are added to the mix of phone, email, and chat channels already in place.

Nearly two out of three ICMI contact centers surveyed measure their forecast accuracy, but not consistently across all channels. While 91% calculate forecasting for inbound phone to live reps, the numbers plummet for all other channels. Very few contact centers compute accuracy across all of their supported channels. This represents a lost opportunity, especially as omnichannel interactions become the new norm.

Acceptable variances in predictions versus actual numbers will depend on the size of the contact center. For large agent groups of 100 or more, a variance of less than 5% is considered best in class.

PRIMARY METRIC

Forecast Accuracy

WHAT IT IS: The variance between contacts forecasted and contacts actually received.

Note: This measurement is best employed as an illustration of reported intervals (generally monthly and per half hour) rather than as a high-level summary of forecasted vs. actual.

WHY IT'S IMPORTANT: Forecast accuracy is critical to contact center planning, budgeting, and scheduling.

HOW TO CALCULATE IT: (Forecast − Actual) ÷ Actual.

WHERE SOURCE DATA RESIDES: Workforce management systems and internal reports.

WHICH CHANNELS TO MEASURE: All contact channels, including inbound and outbound and assisted and self-service.

EMERGING METRICS

Propensity to Contact

WHAT IT IS: The likelihood or number of times customers contact your organization, typically on an annual basis.

WHY IT'S IMPORTANT: This metric—which is based on similar propensity to buy statistics used for years in economics and marketing—can be helpful in forecasting, gauging relative progress in first contact resolution, and assessing marketing effectiveness.

HOW TO CALCULATE IT: Numerical correlation between total contacts and total customers (e.g., a rating of 4 would mean customers contact you an average of 4 times per year).

Note: The numbers should be interpreted in context, as not all contacts are desired.

WHERE SOURCE DATA RESIDES: CRM system.

WHICH CHANNELS TO MEASURE: All assisted contact channels, both inbound and outbound.

66%

of ICMI contact centers surveyed measure their forecast accuracy

Right-Party Contact

WHAT IT IS: The number of genuine contacts required to reach a desired party or decision-maker.

WHY IT'S IMPORTANT: This demonstrates the overall effectiveness of your outreach efforts and integrity of your contact database.

HOW TO CALCULATE IT: The sum total of contacts made until the targeted person is reached.

WHERE SOURCE DATA RESIDES: Dialer reports, CRM, and internal reports.

WHICH CHANNELS TO MEASURE: All outbound assisted contact channels.

Average Handling Time (AHT)

WHAT IT IS: The average amount of time needed to handle a contact.

Note: This metric is best used for high-level insights and ongoing tactical planning, not as a strict agent standard.

WHY IT'S IMPORTANT: An accurate accounting of AHT is critical for resource planning, budgeting, and scheduling training needs. Overall, AHT increases as contacts become more complex and the organization focuses on building deeper customer relationships, but can be reduced with improved processes, technologies, and training.

HOW TO CALCULATE IT: Average Talk Time + Average After-Call Work.

WHERE SOURCE DATA RESIDES: ACD reports.

WHICH CHANNELS TO MEASURE: All assisted contact channels, both inbound and outbound.

METRIC #2

Agent Accessibility

Improving workload forecasting leads to more accurate schedules that place the right people in the right places at the right times. ICMI research shows that leading contact centers handle this scheduling from the bottom up, not top down, gaining buy-in from their agents. With the team working together to optimize schedules based on agent skills, location, and preferences, you're more likely to increase adherence to these schedules, which facilitates workload handling.

PRIMARY METRIC

Adherence to Schedule

WHAT IT IS: How well agents abide by schedules, including amount of time available and when they are available (compliance).

WHY IT'S IMPORTANT: Schedule adherence can have a significant impact on service-level performance and is valuable in all environments as both a high-level objective and an individual agent metric.

HOW TO CALCULATE IT: The amount of time during agent shifts actually spent handling contacts, taking care of after-contact work, and waiting for contacts, OR, outbound contacts vs. scheduled log-on time.

WHERE SOURCE DATA RESIDES: ACD reports and workforce management systems.

WHICH CHANNELS TO MEASURE: All agent-assisted contact channels, inbound and outbound.

SUPPORTING METRIC

Occupancy

WHAT IT IS: The percentage of time agents spend handling contacts vs. waiting for contacts to arrive (inbound) or to be assigned (outbound).

Note: Since occupancy is not directly within the agents' control, it should not be used as a goal or standard to measure individual performance.

WHY IT'S IMPORTANT: This metric can help with budgeting and resource planning, and serve as an indicator of potential agent turnover.

HOW TO CALCULATE IT: For half-hour intervals:

(Contact Volume x Average Handling Time in Seconds) ÷ (Number of Agents x 1,800 Seconds).

WHERE SOURCE DATA RESIDES: ACD reports.

WHICH CHANNELS TO MEASURE: All agent-assisted contact channels, inbound and outbound.

31%
of organizations track agent accessibility in half-hour intervals

METRIC #3

Resource Accessibility

When contacts don't reach the right place at the right time, the quality of customer service drops off precipitously. Setting and measuring service level and response time objectives can help you identify where issues occur most frequently so that you can make process changes or shift resources to make agents available when customers want and via the channels they choose.

According to ICMI, a third of research participants consider this an indispensable metric, and 83% actively measure resource accessibility. Availability by live agents is most often measured or tracked in 30-minute intervals, with 15 minutes being the second-most common interval.

While most contact centers are capable of meeting accessibility objectives for inbound phone to live reps, they struggle to consistently meet targets in other channels. This is particularly true for self-service options. Contact center professionals cite insufficient budget as the leading barrier to improving contact center accessibility.

83%
of contact centers measure resource accessibility

PRIMARY METRICS

Service Level

WHAT IT IS: Percentage of contacts answered in Y seconds (for inbound contacts that can be handled when they arrive).

WHY IT'S IMPORTANT: This metric provides the clearest indication of what the majority of customers experience when they attempt to reach your contact center.

HOW TO CALCULATE IT:

(Calls Answered + Calls Abandoned Within Y Seconds) ÷ (Calls Answered + Calls Abandoned).

EXAMPLE OBJECTIVES:

Emergency Services: 100/0

High: 90/20; 85/5; 90/15

Moderate: 80/20; 80/30; 90/60

Modest: 70/60; 80/120; 80/300

WHERE SOURCE DATA RESIDES: ACD reports.

WHICH CHANNELS TO MEASURE: Inbound phone, social media (real time), SMS, Web chat, Web forms (call-me-now), Web click-to-talk, and video.

Response Time

WHAT IT IS: The number of days, hours, or minutes it takes to handle 100% of outbound contacts or inbound contacts that can be handled at a later time.

TYPES OF RESPONSES:

- **Automatic reply**—A system-generated message that automatically sends a reply to customers acknowledging receipt of their email and providing a date for a response.
- **Agent-generated response**—The response received by the customer when a transaction is actually handled by the contact center, measured as the time that elapses between the customer's original message and the contact center's response.
- **Resolution/escalation**—The measure of when the problem or issue is actually resolved; used in environments where the initial response doesn't fully resolve the issue.

WHY IT'S IMPORTANT: Response time is another prime indicator of the customer experience.

HOW TO CALCULATE IT: Percentage of Contacts Answered in X days, hours, or minutes.

WHERE SOURCE DATA RESIDES: Response management system, CRM, sales platform, and manual tracking.

WHICH CHANNELS TO MEASURE: Outbound phone, email, social media (deferred), Web call-me-later, fax, and postal mail.

Abandoned Contacts

WHAT IT IS: A measure of inbound contacts that disconnect before reaching an agent or self-service response.

Note: This metric is influenced by factors beyond the contact center's control, so it should be measured as an outcome of service levels and used in combination with other metrics instead of as a stand-alone measure.

WHY IT'S IMPORTANT: Abandonment measures can help you diagnose when and where slow response times are occurring so that you can realign resources. Channel pivoting, where customers leave one channel for another, is a form of abandonment and can indicate misaligned resources across multiple channels.

HOW TO CALCULATE IT:

All Calls Abandoned ÷ (All Calls Abandoned + All Calls Answered).

OR

Calls Abandoned After Objective ÷ (Calls Abandoned After Objective + All Calls Answered).

WHERE SOURCE DATA RESIDES: ACD reports.

WHICH CHANNELS TO MEASURE: All inbound contact channels, including self-service.

> " Channel pivoting, where customers leave one channel for another, is a form of abandonment and can indicate misaligned resources across multiple channels. "

Speed of Answer

WHAT IT IS: A reflection of the average delay in responding to all contacts, including those that receive an immediate answer.

WHY IT'S IMPORTANT: This metric highlights the average customer experience and is commonly used as an alternative to service-level measurements. It can add perspective to service level, but should not be used as a primary measure of accessibility.

HOW TO CALCULATE IT:
Total Delay ÷ Total Number of Answered Contacts.

WHERE SOURCE DATA RESIDES: ACD reports.

WHICH CHANNELS TO MEASURE: All assisted inbound contact channels.

METRIC #4

Resolution Quality

The essential nature of high-quality customer service is a key reason that this measure should be applied to every type of customer interaction. Monitoring all service channels that you offer is the only way to get a holistic picture of the customer experience. For example, email customers may not care that you're surpassing phone objectives if their own experience with your contact center isn't at a similar high level.

A survey of participating ICMI contact centers shows that 82% measure the quality of their contacts and most often use quality monitoring or contact quality scores to achieve this measure. The research also shows that monitoring is not consistent across all supported channels, which can skew the results and fail to uncover areas that need remediation.

Resolution Quality Monitoring Across Channels

Channel	Percentage of Contact Centers Measuring It
Inbound phone to live rep	95%
Email	47%
Outbound phone	33%
Live chat	28%
Social media	9%
SMS/Text messaging	2%

82%
of contact centers measure the quality of their contacts using quality monitoring or contact quality scores

PRIMARY METRICS

Quality of Contact

WHAT IT IS: A value placed on the quality of how individual contacts are handled.

WHY IT'S IMPORTANT: Quality of contact handling is another measure of the customer experience and can be used to enhance training programs, identify enterprise-wide problems, and more.

HOW TO CALCULATE IT: There are various methods based on the number of monitored or surveyed contacts. Generally, this metric is tracked monthly using a comprehensive evaluation form that features key criteria identified by the organization as contributing to a quality interaction.

WHERE SOURCE DATA RESIDES: Quality monitoring and customer surveys.

WHICH CHANNELS TO MEASURE: All contact channels, including inbound and outbound, as well as assisted and self-service.

First Contact Resolution (FCR)

WHAT IT IS: A percentage of contacts that require no further action, generally measured on a monthly basis.

Note: 100% is not typically feasible or cost-effective, and FCR measures can vary widely.

WHY IT'S IMPORTANT: FCR can help you increase customer satisfaction and cost-efficiencies by demonstrating how well and how quickly agents are able to settle the issues that prompt the contact.

HOW TO CALCULATE IT: Number of Resolutions That Happen After Initial Contact ÷ Total Contacts.

WHERE SOURCE DATA RESIDES: Customer surveys, quality monitoring, contact tracking reports, CRM, and manual reports.

WHICH CHANNELS TO MEASURE: All inbound contact channels, including self-service.

First Contact Resolution Monitoring Across Channels

Channel	Percentage of Contact Centers Measuring FCR
Inbound phone to live rep	53%
Email	25%
Online chat	15%
Outbound phone	14%
Self-service (Phone/IVR)	7%
Social media	5%
Self-service (Web/Online)	5%

METRIC #5

Employee Satisfaction

There's an undeniable link between customer satisfaction and employee satisfaction, as contented employees are far more likely to be advocates for your brand and be significantly more productive. Plus, while productivity and the quality of service delivered go up as employee satisfaction rises, staff turnover rates decline because people are reluctant to leave a job they enjoy. The high cost of training new hires makes it more cost-efficient to retain agents who are already knowledgeable about your products and processes, which is why this metric is critical to your overall measurement strategy.

PRIMARY METRIC

Employee Satisfaction

WHAT IT IS: A value assigned to how contented contact center employees are with their jobs.

WHY IT'S IMPORTANT: Measuring employee satisfaction levels can help you address issues that may lead to dissatisfaction, which is important because happier employees generally translate into lower absenteeism rates and turnover, and greater productivity, as well as higher customer satisfaction rates and better overall contact center performance.

HOW TO CALCULATE IT: No standard method.

WHERE SOURCE DATA RESIDES: Employee surveys and focus groups.

EMERGING METRIC

Employee Engagement

WHAT IT IS: A quantitative representation of how involved employees are with their work and the organization.

WHY IT'S IMPORTANT: Underused in contact centers for years, employee engagement is gaining popularity as studies have shown a direct link between engaged employees and engaged customers. Gallup research shows a 240% boost in performance-related outcomes when both customers and employees are engaged with the organization.

HOW TO CALCULATE IT: Usually based on employee surveys, but can also incorporate actual behavior.

WHERE SOURCE DATA RESIDES: Employee surveys.

SUPPORTING METRIC

Turnover

WHAT IT IS: A measurement of the number of employees who leave the contact center, including voluntary and involuntary departures for internal and external employees.

WHY IT'S IMPORTANT: Since turnover rates are a reflection of positive and negative issues within the contact center, tracking this metric can help you resolve problems that are causing costly turnover. Retaining the best agents results in a more experienced staff, lower average handling times, and higher-quality interactions.

HOW TO CALCULATE IT: (Number of Agents Exiting Their Job ÷ Average Actual Number of Agents During the Tracking Period) x (12 ÷ Number of Months in the Tracking Period).

Note: Positive and negative turnover can be tracked separately in addition to total turnover.

WHERE SOURCE DATA RESIDES: Internal contact center reports.

Performance-related outcomes can increase by 240% when employers and customers are engaged with the organization

METRIC #6

Customer Satisfaction

Measuring customer satisfaction has the greatest value when it's used as part of a broader strategy, such as the impact that changes in policies, services, and processes have on customer contentment levels. Establishing a baseline for benchmarking over time gives you a tangible measure of the impact that meeting your business objectives is having on your customer base.

Survey-based customer satisfaction scores have proven to be the most successful measure of the customer experience. With robust methodologies, such as a net promoter score or customer effort score, you can also gain deeper insight into your customer service ecosystem, and as a result, uncover opportunities for improvement.

It's important that these measurements span all contact channels that you offer, as satisfaction in one channel may not translate across the board. ICMI research shows that contact centers are not consistently measuring their customer experience across multiple channels, which can leave them vulnerable in today's omnichannel environments.

PRIMARY METRIC
Customer Satisfaction

WHAT IT IS: The percentage of customers who are satisfied with the service they receive.

WHY IT'S IMPORTANT: Customer satisfaction is a driver of customer loyalty— and happier customers typically spend more and spread positive brand feedback. Sharing this metric with agents can help them identify opportunities to improve products and processes to boost satisfaction.

HOW TO CALCULATE IT: No standard method.

WHERE SOURCE DATA RESIDES: Surveys conducted during or after the contact, third-party outreach efforts, and focus groups.

EMERGING METRIC
Customer Effort

WHAT IT IS: The customer's perception of how easy it is to have issues resolved.

WHY IT'S IMPORTANT: Less effort on the part of the customer can lead to higher levels of loyalty. According to ICMI research, four out of five consumers say the primary factor in a great customer service experience is how easily and quickly their issues are resolved.

HOW TO CALCULATE IT: Numerical response to survey questions about the ease of resolving the issue—often a 5-10 point scale ranging from "Difficult" to "Easy."

WHERE SOURCE DATA RESIDES: Post-contact surveys.

87%
of contact centers measure customer satisfaction

Customer Satisfaction Measurement by Channel

Channel	Percentage of Contact Centers That Measure Customer Satisfaction
Inbound phone to live representatives	83%
Email	44%
Online chat	26%
Outbound phone	24%
Self-service: Web and online	17%
Self-service: Phone and IVR	14%
Social Networking sites	12%

Strategic Value

Measuring the overall value of your contact center can help you see the role it plays in revenue generation, marketing initiatives, product innovation, and other primary business objectives. To best determine strategic value, organizations often focus on samples of impact in these areas, deriving these samples from listening, engaging, and learning from customer interactions.

PRIMARY METRICS

Contact Center ROI

WHAT IT IS: Objectives related to the contact center's overall return on investment.

WHY IT'S IMPORTANT: Tracking this value helps you identify, measure, and improve the contact center's impact on the organization based on customer feedback, suggestions for innovation, quality improvement, and more.

HOW TO CALCULATE IT: No standard method.

WHERE SOURCE DATA RESIDES: A variety of sources within and outside the organization.

Performance Against Budget

WHAT IT IS: A measure of how effectively operations are being managed based on approved budget.

Note: Using volume-related budgets enables contact centers to allocate staff based on their workload without a negative impact on budget.

WHY IT'S IMPORTANT: This metric helps ensure that goals are achieved and the organization's mission is supported.

HOW TO CALCULATE IT: The variance between Budget and Actual Spend.

WHERE SOURCE DATA RESIDES: Internal reports and financial reports.

Revenue

WHAT IT IS: A measure of the revenue attributed to contact center services.

Note: Results are often correlated with other variables, including contact center costs, market conditions, and revenues through other channels of contact, such as retail or direct sales.

WHY IT'S IMPORTANT: For revenue-generating contact centers, this measurement can help quantify the center's true impact on the organization, including the effectiveness of up-sell and cross-sell programs, as well as sales skills training.

HOW TO CALCULATE IT: No standard method.

WHERE SOURCE DATA RESIDES: Sales reports, total orders, and CRM system reports.

34%
of contact centers measure their strategic value

Cost Per Contact

WHAT IT IS: A method of calculating factors that impact the cost of contacts.

WHY IT'S IMPORTANT: This measurement can help you assess contact center efficiency, especially when used in conjunction with contact volumes and average handle times. Cost per contact must be analyzed in context, as a higher cost per contact could be the result of process improvements that result in fewer contacts, thereby spreading fixed costs over a smaller number of contacts.

HOW TO CALCULATE IT:

Total Contact Center Costs ÷ Total Contacts for the Tracking Period (e.g., monthly).

Note: You can differentiate this metric by channel and types of contact.

WHERE SOURCE DATA RESIDES: Internal reports and financial reports.

WHICH CHANNELS TO MEASURE: All contact channels, including inbound and outbound as well as assisted and self-service.

Driving Desired Behaviors with a Strategic Measurement Strategy

Metrics define success and record where progress has been made. They provide tangible evidence of your enterprise's actions. But, these measurements must be relevant, accurate, timely, complete—and ongoing—to be most effective.

By measuring factors that accurately reflect your business objectives, you can gain a deeper level of insight into current contact center behaviors that can in turn help you refine internal processes, manage workloads more efficiently, and proactively address the problems that are causing customer issues in the first place. In today's omnichannel environment, it's also important to measure performance across all service channels offered to gain a holistic view of the interactions customers have with your contact center.

With the right metrics and informed interpretation, you can provide a best-in-class customer experience that promotes loyalty, drives revenue, and helps propel your business forward.

> With the right metrics and informed interpretation, you can provide a best-in-class customer experience.

A Note About Interpreting Metrics

Metrics don't exist in a vacuum; they're interrelated. A change in one often affects one or more other measurements, such as an increase in self-utilization rates resulting in a spike in use of assisted channels. Understanding the delicate dance among these factors can help you refine your policies to achieve the overall results you seek.

It's also important to view each metric in context because numbers by themselves can be misleading. For example, high rates for first contact resolution may be masking issues such as repeat contacts that could be fixed with product or communications changes.

And bear in mind that while some measurements can be easily sourced, others entail more complex tactics. But it's often the more involved measures that provide the most compelling information.

About Five9 Inc.

Five9 is a leading provider of cloud software for the enterprise contact center market, bringing the power of the cloud to thousands of customers and facilitating approximately 3 billion customer interactions annually. Since 2001, Five9 has led the cloud revolution in contact centers, helping organizations transition from legacy premise-based solutions to the cloud. Five9 provides businesses reliable, scalable, secure, and compliant cloud contact center software designed to create exceptional customer experiences, increase agent productivity, and deliver tangible business results. For more information, visit **www.five9.com**.