

Process Improvement

Case Study – Call Center Reporting

A health insurance company's call center reporting process was totally manual, cumbersome, untimely, inaccurate and poorly formatted. The processes were evaluated and the following issues were noted:

- All 19 daily measures were manually gathered and metrics were calculated on a hand calculator.
- Weekly, monthly and quarterly reports were compiled from individual daily report sheets and manually calculated.
- Mathematical errors were prevalent and poor numerical techniques were used (examples: averaging averages, typos, math errors, etc.)
- The call center supervisor spent thirty hours per month on reporting.
- The reports contained little analysis and none of value.
- Reports were usually completed well into the next reporting period.

Process Improvement

Actions Taken

- A daily data gathering spreadsheet tool was developed.
- The tool stored each day's numbers in a database.
- No math was required to enter data or to produce a report.
- Daily, weekly, monthly and quarterly reports read the database to automatically produce reports.
- Report generation was reduced to one or two mouse clicks.
- Report formats were totally revised.
- Charting and trending were added.
- Day of the week analysis was added and used to plan phone staffing.

Process Improvement

Qualitative Results

- Report generation time was dramatically reduced.
- Report development time was reduced from hours to seconds.
- Day of the week analysis was used to plan phone staffing.
- Improved analytical features allowed for better management of resources.
- Improved data structure allowed for additional analysis and trending.
- Other call center supervisors wanted a comparable reporting system.
- Confidence was restored to the call center's reporting and metrics.
- Management was now able to make business decisions based on sound data.

Process Improvement

Quantitative Results

- Report generation time was reduced from 30 hours to 30 minutes per month.
- Timeliness was improved to being available within a few minutes of data entry.
- With 15 call personnel, the supervisor was able to spend an extra two hours per employee per month.
- The reporting tool was adapted to six other call centers.

Process Improvement

Do your reporting systems work this well?

Abundant Solutions

www.abundant-solutions.com

Contact Douglas M. Smith

doug@abundant-solutions.com