

Contact Center Lexicon

A.

Abandoned call: A call or the other type of contact that has been offered into a communications network or telephone system, but is terminated by the person originating the contact before any conversation happens. In an outbound calling scenario, an abandoned call refers to a call that is disconnected by the automated dialer once live contact is detected and no agent is available to match up with the call.

Abandonment rate: The percentage of callers who hang up before an agent answers their call, or before they make a selection in an IVR (interactive voice response) unit. The inverse of Answer rate.

Accessibility: Measures that describe the ease with which customers can access your service, the general speed of call answering, and your customers' level of acceptance with this speed of answer.

Activity codes: A feature of an ACD that allows agents to key in a code during or after conversation with the caller. The codes are generally used to identify the reason for the call, what was done for the caller, which advertisement prompted the call, or some other piece of information that is useful to the business.

Adherence: The term used to describe how well agents stick to their planned work schedules. May also be referred to as compliance.

Advanced 800 services: A set of toll-free services named initially by AT&T that includes long-distance calls routing into an organization based on time-of-day, point of origin, or percentage allocation of call volume.

After-call work (ACW): work immediately following a call or transaction. If work must be completed before agent can handle next contact, then ACW is factored into average handle time. Work may involve keying activity codes, updating database, filling out forms, or placing an associated outbound contact.

Agent: the person that handles customer contacts in a call center. Also referred to as a telephone service representative (TSR) or customer service representative (CSR).

Agent availability: The amount of time that agents are available and waiting to take calls. Usually expressed as a percentage.

Agent group, split or gate: A group of agents handling a specific type or group of calls or contracts.

Agent occupancy: The percent of logged in time that an agent spends in active contact handling states (i.e. on incoming calls, in wrap-up activity, on outbound calls) compared to sitting idle awaiting a call arrival.

Agent status: the current work mode of the agent, such as busy on call, available, unavailable,

after-call work (ACW), off-phone work, etc.

Agent utilization: The percentage of total agents that are logged in to the phone system, busy handling customer calls. The inverse of Agent availability.

All trunks busy (ATB): A state in which all trunks in a specific trunk group are busy. ATB may occur when all trunks are actually occupied with calls, or when some portion of trunks are artificially blocked by system user in periods of understaffing to minimize number of calls in queue.

Announcement: A recorded verbal message played to callers.

Answer rate: The percentage of calls that are answered by a call center – defined by callers speaking to an agent or making a selection in the IVR – compared to the total number of calls coming in.

Answer supervision: The signal sent by the ACD or other device to the local or long distance carrier to accept a call. That's when billing for either the caller or the call center will begin, if long distance charges apply.

Answered call: When referring to an agent group, a call counted as answered when it reaches an agent.

Application based routing and reporting: The ACDE capability to route and track transactions by type of call, or application (e.g., sales, service, etc.), versus the traditional method of routing and tracking by trunk group and agent group.

Architecture: The basic design of a system. Determines how the components work together, system capacity, upgradeability, and the ability to integrate with other systems.

Area code: a three-digit number identifying geographic areas of the United States and Canada. It permits direct distance dialing on the telephone system. Also known as numbering plan area (NPA).

Audiotex: A voice processing capability that enables callers to automatically access pre-recorded announcements. See Voice Processing.

Auto available: An ACD feature whereby the ACD is programmed to automatically put agents into Available after they finish Talk Time and disconnect calls. If they need to go into After-Call Work, they have to manually put themselves there. See Auto Wrap-up.

Auto wrap-up: An ACD feature whereby the ACD is programmed to automatically put agents into After-Call Work after they finish Talk Time and disconnect calls. When they have completed any After-Call Work required, they put themselves back into Available. See Auto Available.

Automated attendant: A voice processing capability that automates the attendant function. The system prompts callers to respond to choices (e.g., press one for this, two for that.) and then coordinates with the ACD to send callers to specific destinations. This function can reside in an on-site system or in the network.

Automatic call distributor (ACD): A specialized phone system used for handling incoming calls. The ACD recognizes and answers an incoming call, looks in its database for call routing instructions, and distributes the call as appropriate. An important role of the ACD is to produce management information tracking both calls and agent performance.

Automatic number identification (ANI): information provided about the number from which a person is dialing. Also referred to as caller ID. The series of digits is received from one of two sources: the ANI received from the long distance phone company that may arrive over the D channel of an ISDN PRI circuit or on a dedicated single line before the first ring.

Automated attendant: A device that answers callers with a recording, and allows callers to route themselves by dialing digits associated with menu choices.

Automated greeting: The capability of an ACD or add-on system to allow an agent to record a greeting that automatically plays when each call is answered.

Auxiliary work state: A work state other than actively handling calls. As an example, agents may go into an auxiliary work state to process paperwork or emails. Agents will not receive calls while in auxiliary work state.

Available time: the period of time spent waiting to accept and/or busy on an inbound or outbound contact.

Available state: Agents who are signed on the ACD and waiting for calls to arrive.

Average delay of delayed callers: Average wait in queue experienced only by those callers who are delayed. Does not include those calls that are answered immediately.

Average delay to abandon: Average time callers are held in queue before disconnecting (prior to agent answer)

Average handle time (AHT): the amount of time an employee is occupied with an incoming contact. This is the sum of the conversation time (including the time a caller may be put on hold during the call) and after-call work.

Average holding time on trunks (AHT): The average time inbound transactions occupy the trunks. It is: (Talk Time + Delay Time)/Calls Received. AHT is also an acronym for Average Handling Time, which has a different meaning.

Average speed of answer (ASA): the average wait in queue experienced by all callers to an ACD group during a specified period. It includes both calls delayed and those answered immediately in the calculation.

Average talk time (ATT): The average amount of time that agents spend speaking directly with customers. Usually expressed in seconds.

Average after-call work time (AWT): The average amount of time agents spend working on customer accounts after the caller has hung up and during which they are unavailable to take another call. Also known as not-ready time.

B.

Base staff: the minimum number of agents needed to provide service in a given period of time. Also called “bodies in seats”. Does not account for non-productive work factors such as breaks, trainings, meetings, etc.

Basic rate interface (BRI): One of two basic levels of ISDN service. A BRI line provides two bearer channels for voice and data and one channel for signaling (commonly expressed as 2 B+D). See Primary Rate Interface (PRI) and Integrated Services Digital Network.

Beep tone: An audible notification that a call has arrived (also called Zip Tone). Beep tone can also refer to the audible notification that a call is being monitored.

Benchmarking: The process of measuring performance against some set standard. Benchmarking in the contact center industry refers to comparing demographics, processes, and service with the other organizations to identify strengths, weaknesses, and improvement opportunities in one’s own organization.

Blended call center: an operation that handles more than one type of communications. These different types of contacts may be a mixture of inbound and outbound calls, or may be a mix of telephone calls, emails, and contacts via other channels of communications.

Blockage: The inability to complete a connection between two points because of a busy condition in the pathway.

Blocked call: A call that cannot be completed because of a busy condition.

Bodies in chairs: A term used to refer to the base number of staff needed on the phones to meet a speed of answer goal. The bodies in chairs number assumes staff are available 100% of the time to handle calls and does not yet include adjustments for staff shrinkage.

Business Case: A process for the analysis, evaluation, and presentation of data to support a specific business need and its proposed solution. A business case is developed to demonstrate that a project is economically sound, will be well managed, and will benefit the enterprise.

Business to Business: A term used to describe inbound or outbound contacts that are primarily to/from another business.

Business to Consumer: A term used to describe inbound or outbound contacts that are primarily with an individual consumer.

Busy Hour: The two consecutive half-hour periods of a day in which the largest number of calls/contacts are offered.

Busy Study: A telephone study provided by a local or long-distance carrier showing the number of calls attempting to be connected on incoming trunks and what number of percentage of those attempts were not possible due to insufficient trunk capacity, resulting in a busy signal to the caller.

C.

Callback Messaging: A feature in which callers on hold can leave an oral message or their telephone numbers using the keys of a touchtone telephone pad for later callback from an agent instead of remaining on hold.

Call Blending: The process of combing the flow of inbound/outbound calls and other contacts such as email or web transactions to a set of agents. Contact blending can be accomplished manually or by means of automated systems that route the contacts to the agents capable of handling them.

Call by call routing: The process of routing each call to the optimum destination according to real-time conditions. See Percent Allocation and Network Inter-flow.

Call Center: An operation with two or more persons that makes and receives calls, where the incoming call requires a service and not a particular individual to handle it. Call centers may be help desks, customer service centers, catalog sales centers, reservations centers, or telemarketing/collections operations.

Call control: The act of controlling the flow of a conversation, usually by asking questions.

Call control variables: The set of criteria the ACD uses to process calls. Examples include routing criteria, overflow parameters, recorded announcements and timing thresholds.

Call detail recording: Data on each call, captured and stored by the ACD. Can include trunk used, time in queue, call duration, agent who handled the call, number dialed (for outgoing), and other information.

Call forcing: An ACD feature that automatically delivers calls to agents who are available and ready to take calls. They hear a notification that the call has arrived (e.g., a beep tone), but do not have to press a button to answer the call.

Call guide: A tool (or template) that outlines the natural flow of the call, providing agents with questions to ask and product information to assist them with call control. (Call guides are often put online in a computer application.)

Call length: How long it takes to process one customer interaction. Usually expressed as an average. See Average handle time.

Call review assessment: An assessment of an agent's call-handling proficiency, usually scored and conducted by a member of your call center's quality assurance team.

Call strategy: The plan or approach that an agent will take in handling a customer call. Includes the desired outcome of the call.

Call time: See Average handle time.

Caller-entered digits: Digits callers enter using their telephone keypads. The ACD, VRU, or network can prompt for CEDs.

Calling line identity (CLI): See Automatic Number Identification. ow long it takes to process one customjjjj

Caller ID: A telephone network feature of the local telephone company by which the telephone number of the caller is passed to the called party.

Calls in queue: A real-time report that refers to the number of calls received by the ACD system but not yet connected to an agent.

Calls per agent: The number of calls handled by your call center divided by the total number of agents taking calls in a given period.

Cancellations per contact: The number of customers canceling service divided by the total number of calls handled in a given period.

Carrier: A company that provides telecommunications circuits. Carriers include both local telephone companies and long distance providers.

Cause-and-effect diagram: A tool to assist in root cause identification, developed by Dr. Kaoru Ishikawa.

Central Office (CO): Can refer to either a telephone company switching center or the type of telephone switch used in a telephone company switching center. The local central office receives calls from within the local area and either routes them locally or passes them to an inter-exchange carrier (IXC). On the receiving end, the local central office receives calls that originated in other areas, from the IXC.

Centum call seconds (CCS): 100 call seconds, a unit of telephone traffic measurement. The first C is the Roman numeral for 100. 1 hour = 1 Erlang = 60 minutes = 36 CCS.

Chat: A system that allows any number of logged-in computer users to have a typed, real-time, online conversation.

Chief information officer (CIO): A typical title for the highest ranking executive responsible for an organization's information system.

Circuit: A transmission path between two points in a network.

Client/server architecture: A network of computers that share capabilities and devices.

Collateral duties: Non-phone tasks e.g., data entry) that are flexible, and can be scheduled for periods when call load is slow.

Common causes: Causes of variation that are inherent to a process over time. They cause the rhythmic, common variations in the system of causes, and they affect every outcome of the process and everyone working in the process. See Special Causes.

Completed Call: A contact that is handled to completion by an agent, or in an outbound dialing scenario, a contact that has been through maximum recycle attempts.

Computer simulation: A computer technique to predict the outcome of various events in the future, given many variables. When there are many variables, simulation is often the only way to reasonably predict the outcome.

Computer Telephony Integration (CTI): The linking of the telephone system to the computer which houses the company's database to permit faster and more efficient handling of calls. Screen pop is a

function of CTI which can direct the data screen of the calling person's account to the terminal of the agent as the call is being routed there, saving the agent from having to identify the caller's account number, key it in, and wait for computer response. CTI permits transfer of data screens to a second agent when a call is transferred and may other capabilities impossible with only one or the other system independently.

Conditional Routing: The capability of the ACD to route calls or contacts on an "if..then" basis. Routing conditions can include day of week, time of day, agent availability, type of call, service needed, etc.

Contact: Any contact between a customer and an agent – could be a call, e-mail, chat, fax, or letter.

Contact center: Usually synonymous with call center. A contact center will handle e-mail, chat, faxes, and so on – not just "calls".

Contact Management: Software applications and systems that keep track of all customer contacts for subsequent contacts and as an audit trail.

Contingency Planning: The process of determining what adverse situations might happen within a business, what can be done to prevent the problems from occurring, and how to react and recover if the situations should occur.

Contract Staffing: A service utilized by call centers in which staff from outside sources are employed to work in the call center. The staff are recruited and trained by the contract staffing agency and are employees of that agency rather than employees of the call center.

Controlled busies: The capability of the ACD to generate busy signals when the queue backs up beyond a programmable threshold.

Conversion rate: A measure of agents' sales proficiency. The number of sales made divided by the number of calls taken.

Cost per call: The total costs associated with running the call center divided by the number of calls handled in a given period.

Cost benefit analysis: The comparison of benefits and costs in decision-making, by assigning dollar values to benefits and costs.

Customer Relationship Management (CRM): The strategy of identifying customer needs, improving customer interactions, and customizing contacts, sales approaches, and automation to provide optimum service to each type of customer to maximize the bottom line benefits to the organization. It is a broad term that takes into account people, processes and technology related to the acquisition and retention of customers, and the maximization of the value of each customer relationship.

Customer service: By definition, the act of assisting or working on behalf of a customer. More commonly, the level of service provided to the customer.

Customer Service Representative: A representative, who handles customer calls and contacts including account inquiries, complaints or support calls. Also, see Agent.

D.

Data Aberrations: Anomalies in historical data that may represent extremes in the data that should not be included in the forecasting process. Some aberrations may be valid repeatable events while others may be situations that will not occur again and should be normalized or discarded in the data analysis and forecasting process.

Database: collection of data structured and organized in a disciplined fashion for quick and easy access to information of interest.

Database call handling: A CTI application, whereby the ACD works in sync with the database computer to process calls, based on information in the database. For example, a caller inputs digits into a voice processing system, the database retrieves information on the customer and then issues instructions to the ACD on how to handle the call (e.g., where to route the call, what priority the call should be given in queue, the announcements to play, etc.).

Data directed call routing: a capability whereby an ACD can automatically process call based on data provided by a database of information resident in a separate data system. For example, a caller inputs an account number via touchtone phone. the number is sent to a data system holding a database of information on customers. The number is identified, validated and the call is distributed automatically based on the specific account type.

Data mart: a small, single subject warehouse used by individual groups of users.

Data mining: the automatic detection of trends and associations contained in a set of customer data.

Data warehouse: collection of physical data stores designed to present an historical perspective of events or transactions that occur in an enterprise. Customer data is collected on a centralized basis to facilitate analysis and to be readily available to all departments.

Day-of-week routing: the routing of calls to different destinations based on day of week. Generally used to route calls to alternate sites or automated systems on weekend days or holidays when agents may not be available at traditional destinations.

Delay time: the time callers remain in queue waiting for an agent to become free. May include the time listening to the delay announcements, but does not include the time spent going through an automated attendant menu system selecting choices that result in direction of the call to a specific resource or agent group. The statistic is calculated by the ACD system may not vary among vendor products.

Delay announcements: recorded announcements played to holding callers containing information and requesting their patience in waiting for an agent.

Desktop applications: computer software programs used to accomplish a variety of tasks. Word processor, spreadsheets, database, contact management, and graphics programs are all examples of desktop applications.

Detrending: the process in which the most recent twelve months of data are brought up to current levels by equalizing the effect of trend rate. The detrending process removes the influence of trend from a set of data so the true seasonal patterns can be identified.

DNIS (dialed number identification service): a feature of 800 or 900 service that provides the number the caller dialed to the reaching switch. Using DNIS capabilities, one trunk group can be used to serve multiple applications. The DNIS number can be provided in a number of ways, in-band or out-of-band, ISDN or via a separate data channel. Generally, a DNIS number will be used to identify to the answering telephone system the “application” the caller dialed.

Disaster recovery plan: A planned procedure for sending incoming calls to another site in the event that some emergency (disaster) befalls your primary site.

Drivers: Measures that impact reaching your business objectives and can be controlled by management and staff.

Dynamic network routing (DNR): A service provided by the telephone companies that allows the call center to dynamically change where customer calls are routed.

E.

Economies of scale: the principle of gaining better efficiencies through larger group sizes. For example, twice as many calls does not require twice as many staff or trunks to handle because of inherent efficiencies of larger offered call loads and larger groups.

Efficiency: The use of resources, for example money, with as little waste as possible.

Efficiency metrics: Measures that gauge costs and efficiencies in the call center.

Envelope scheduling: Purposely scheduling more agents that needed to handle the forecasted number of inbound calls, then using agents who are not busy taking inbound calls to do outbound calls or other work (chat, e-mail). See also Blending.

Erlang: a measure of telecommunication traffic usage. One Erlang equals 3600 seconds of usage in a one-hour period of time.

Erlang Models: a set of traffic engineering techniques utilized to determine numbers of facilities required in various telecommunications scenarios that were developed by Danish mathematician A.K. Erlang in early 1900's. Erlang B used to determine required facilities in an “all calls cleared” situation such as automatic route selection in a PBX. Extended Erlang B is a modified technique used when there is measurable retry of calls taking place when calls are blocked. Erlang C assumes blocked calls will wait in queue and is therefore the Erlang technique used to determine staffing needs in a typical “hold for agent” contact center scenario.

Erlang-Engset: A traffic engineering model that is used in a “smooth” traffic flow situation, such as an outbound calling scenario where calls are placed sequentially and not randomly. Statistically speaking, Erlang-Engset is used in a traffic situation where the variance-to-mean ratio (VMR) is less than one.

Equivalent Random Theory: A traffic engineering model that is used in a “peaked” traffic situation, such as calls responding in an “all or nothing” fashion to television advertising. Statistically speaking, Equivalent Random Theory is used in a traffic situation where the variance-to-mean ratio (VMR) is greater than one.

Error rate: Either the number of defective transactions or the number of defective steps in a

transaction.

Escalation plan: A plan that specifies actions to be taken when the queue begins to build beyond acceptable levels.

Executive summary: A brief summary of the key points of a more detailed report or study.

F.

Facsimile (FAX): Technology that scans a document, encodes it, transmits it over a telecommunications circuit, and reproduces it in original form at the receiving end.

Fast clear down: A caller who hangs up immediately when they hear a delay announcement.

Fax on demand: A system that enables callers to request documents, using their telephone keypads. The selected documents are delivered to the fax numbers they specify.

FCC or Federal Communications Commission: A federal organization based in Washington, D.C. set up by the communications Act of 1934 to regulate all interstate communications originating in the United States.

Feel, felt, found: A call-handling strategy used by agents when handling difficult situations with customers. Feel, felt, found is based on the principle of empathy and understanding.

First attempt: the calls that are attempting to be connected on a group of trunks for the first time. Traffic engineering is based on first attempt traffic, as compared to offered or carried load.

First call resolution: the situation in which a caller's question is answered or problem solved during the initial call without requiring follow-up contacts. First call resolution has a high correlation rate with overall customer satisfaction.

Flowchart: A step by step diagram of a process.

Flushing out the queue: Changing system thresholds so that calls waiting for an agent group are redirected to another group with a shorter queue or available agents.

Full-time equivalent (FTE): Full-time equivalent person, equal to the number of total scheduled persons hours divided by the number of hours per week which constitute a full-time person (e.g., 40 hours, or 35 hours). FTE may consist of several part-time individuals whose combined work hours in a week equal the full-time person.

Full coverage scheduling: the type of scheduling process that creates schedules so that every single half-hour period is covered.

Funnel forecasting: the process of starting with an annual forecast and narrowing to smaller monthly, then weekly, then daily, then half-hour forecast.

G.

Gate: An ACD routing division that allows contacts arriving on specific telephone trunks or certain transaction types to be answered by specific groups of employees. Also referred to as split or group.

Grade of service: the definition of service on telecommunications transmission facilities. Grade of service is typically defined as the probability of encountering a busy signal on a trunk or group of trunks. For example, a P01 grade of service means that one percent of calls will encounter a busy signal.

H.

Handled call: A call that is answered by an employee as opposed to being blocked or abandoned.

Handling time: The time an agent spends in Talk Time and After-Call Work, handling a transaction. Handling time can also refer to the time it takes for a machine to process a transaction.

Help desk: A call center typically set up to handle calls in support of a product or service. Used most often to describe the customer support operation of computer software or hardware suppliers.

Historical reports: Reports that track call center and agent performance over a period of time. Historical reports are generated by ACDs, third party ACD software packages, and peripherals such as VRUs and Call Detail Recording Systems. The amount of history that a system can store varies by system.

Hit rate: the number of connected contacts as a percentage of the number of attempts.

Home agent: An agent that works from home or someplace else other than the actual contact center location.

I.

Idle time: The time agents spend waiting for calls; that is, not busy with customers on the line or doing after-call work. Can be expressed either as a percentage of total time logged in or in hours.

Imaging: A process whereby documents are scanned into a system and stored electronically.

Immutable law: A law of nature that is fundamental, and not changeable (e.g., the law of gravity). In an inbound call center, the fact that occupancy goes up when service level goes down, is an immutable law.

Incoming call center management: The art of having the right number of skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality.

Inbound: Incoming calls (or faxes, e-mails, or chats) that are generated by customers. See also Outbound.

Incremental revenue (value) analysis: A methodology that estimates the value (cost and revenue) of adding or subtracting a agent.

Index factor: In forecasting, a proportion used as a multiplier to adjust another number.

Integrated services digital network (ISDN): A set of international standards for telephone transmission. ISDN provides an end-to-end digital network, out-of-hand signaling, and greater bandwidth than older telephone services. The two standard levels of ISDN are Basic Rate Interface (BRI) and Primary Rate Interface (PRI). See Basic Rate Interface and Primary Rate Interface.

Information mailbox: A voice processing technology that allows callers to access pre-recorded information via a menu system. An information mailbox may be used to provide directions to a site, hours of operation, operating instructions, or other standard pieces of information that do not require a human interaction.

Information technology (IT): The development, installation, and implementation of computer systems and applications.

In-sourcing: Another name for contract staffing. The practice of using an outside entity to recruit, hire, and train staff. These staff may be the employees of the company or of the staffing agency.

Interactive voice response (IVR): A device which automates retrieval and processing of information by phone using touch-tone signaling or voice recognition to access information residing on a server to give a response. The response may be given by a recorded human voice or a synthesized (computerized) voice. IVRs are used in applications such as "bank by phone" or "check on my order" which not only distributes information but collects transaction information.

Interflow: Calls that flow out of the ACD to another site, a voice mail system, or telephone number that is not part of the ACD environment. When an ACD group cannot handle all the calls coming in, the call can be manually or automatically inter-flowed to another site. This feature allows calls to be rerouted to a predefined destination.

Interflow/overflow: Calls that flow between agent groups within an ACD. Typically, it is based in an effort to balance workload and minimize caller delay.

Internal help desk: A group that supports other internal agent groups, e.g. for complex or escalated calls.

Internal response time: The time it takes an agent group that supports other internal groups (e.g., for complex or escalated tasks) to respond to transactions that do not have to be handled when they arrive (e.g., correspondence or e-mail). See Response Time and Service Level.

Internet “call me” transaction: A transaction that allows a user to request a callback from the call center, while exploring a Web page. Requires interconnection of the ACD system and the Internet by means of an Internet Gateway.

Internet phone: Technology that enables users of the Internet’s World Wide Web to place voice telephone calls through the Internet, thus by-passing the long distance network.

Invisible queue: A situation in which callers are waiting and have no way of knowing how long the waiting time is.

ISO 9001/2000: An international standard for the creation and maintenance of a quality assurance system within a company.

J.

Judgmental forecasting: Goes beyond purely statistical techniques and encompasses what people believe is going to happen. It is in the realm of intuition, interdepartmental committees, market research and executive opinion.

K.

Key performance indicator (KPI): The most critical measures of performance in any organization.

Knowledge management system: A technology that contains a database of knowledge and pertinent information related to handling customer interaction.

L.

Labor saturation rate: The rate that measures to what degree a position already exists in a certain population. It is commonly used to measure to what degree qualified staff may be available in a certain labor market and is calculated by dividing the number of specific positions by the working population for that area. A labor saturation rate of under two percent is considered to be desirable in finding needed staff, while a labor saturation rate of over five percent may indicate not enough qualified workers will be available.

LAMA: A call-handling technique that emphasizes listening and interaction with the customer for call control. Designed by Judy McKee of McKee Motivation.

Law of diminishing returns: The declining marginal improvements in service level that can be attributed to each additional agent, as successive agents are added.

Load balancing: The process of balancing contacts between multiple sites, queues, or agent groups.

Local area network (LAN): The connection of multiple computers within a building, so that they can share information, applications and peripherals. See Wide Area Network.

Local exchange carrier (LEC): The local telephone company that provides local telephone service and calling capabilities and long-distance calling within the local or regional area (within the LATA – local access and transport area).

Logged on: A state in which agents have signed on to a system (made their presence known), but may or may not be ready to receive calls.

Long call: For staffing calculations and traffic engineering purposes, calls that approach or exceed thirty minutes.

Longest available agent: A method of distributing calls to the agent who has been sitting idle the longest. With a queue, Longest Available Agent becomes “Next Available Agent”.

Longest delay in queue (LDQ): The longest time a caller waited in queue prior to being handled. Represents the worst case during the measurement period. Longest delay to abandon measures the worst case for a caller who was not handled.

Look-ahead routing: The capability of a system to “look ahead” to evaluate the availability/condition of a trunk group or agent group before routing or overflowing a contact there.

M.

Make busy: The process of setting a trunk or trunk group to return a busy tone to callers or make other communication paths or equipment unavailable. This technique can be used to downsize the number of incoming contacts to understaffed groups.

Management by walking around (MBWA): The common practice in contact centers of supervisors/managers physically walking through the center to observe contact handling and overall performance.

Metric: A measure of performance.

Middleware: Software that mediates between different types of hardware and software on a network, so that they can function together.

Mission statement: The statement that defines an organization's purpose and operating principles.

Modem: A contraction of the terms Modulator/Demodulator. A Modem converts analog signals to digital and vice versa.

Monitoring: The practice of listening to agents' telephone calls to assess the quality with which the call is handled. Also called service observation, the monitoring may be silent, announced, side-by-side, or recorded for later review.

Multimedia: Combining multiple forms of media in the communication of information. (E.g., a traditional phone call is "monomedia," and a video call is "multimedia.")

N.

Network control center: Also called Traffic Control Center. In a networked call center environment, where people and equipment monitor real-time conditions across sites, change routing thresholds as necessary, and coordinate events that will impact base staffing levels.

Network inter-flow: A technology used in multi-site call center environments to create a more efficient distribution of calls between sites. Through integration of sites using network circuits (such as TI circuits) and ACD software, calls routed to one site may be queued simultaneously for agent groups in remote sites. See Call by Call Routing and Percent Allocation.

Next available agent: The practice of routing the first contact in queue to the first available agent, maintaining an equitable workload among agents. If no queue exists, contacts are routing the agent idle the longest.

Noise canceling headset: Headsets equipped with technology that reduces background noise.

Non ACD in calls: Inbound calls which are directed to an agent's extension, rather than to a general group. These may be personal calls or calls from customers who dial the agents' extension numbers.

Non-productive agent time: Time for which agents are being paid but are not on the phones – also called off-phone time. Includes time spent in meetings, training sessions, coffee breaks, and so on.

Nuisance call: The situation that occurs when a live contact is made with a potential customer, but no live agent is available to match up with the call, resulting in dead air space to the customer.

O.

Occupancy: The percent of logged in and available time that an agent spends in active contact handling (i.e., on incoming calls, in wrap up, on outbound calls) versus in the idle, waiting state. It is generally recommended that occupancy levels not exceed 90%.

Offered call: A call that is received by the ACD. Offered calls are then either answered by a resource (handled) or abandoned.

Off-peak: Periods of time other than the call center's busiest periods. Off-peak times are used to accomplish non-phone work in most centers. Term is also used to refer to discount time periods by telecommunications carriers.

Open ticket: A customer contact (transaction) that has not yet been completed or resolved (closed).

Outbound: The calls (or faxes, e-mails, or chats) going out to customers that are generated by your agents. Telemarketing is the most common example. See also Inbound.

Outsourcing: Contracting with an outside company to handle some or all of an organization's contacts with customers.

Overflow: Contacts that route from one place to another group or site. Intraflow is the term used to describe the routing of contacts to another group within the same ACD, while interflow refers to routing a contact from one ACD to another site.

P.

Pacing algorithm: A set of instructions used by an automated outbound dialer to determine when to initiate a call attempt. System can speed up the dialing speed when too many idle agents are detected, or slow down the pace if too many live answers are unable to be matched up with a live agent.

Pareto chart: A bar chart that arranges events in order of frequency. Named after 19th century economist Vilfredo Pareto.

PBX: Private branch exchange. A private telephone exchange located on the user's premises and connected to the public network via trunks. (Sometimes called PABX where the A stands for "automatic.")

PBX/ACD: A PBX that is equipped with ACD functionality.

Peak traffic: The highest volume load of traffic offered to a telecommunications system.

Peaked traffic: The type of traffic pattern in which pronounced peaks and valleys of call volume occur within an hour or half-hour window of time. In statistical terms, the variance-to-mean ratio of peaked traffic is greater than one.

Percent allocation: A contract routing strategy used by multi-site call center operations. Contacts in the network are routed to various sites based on user-defined percentages.

Performance standards: A set of goals or objectives that define the ideal behaviors to be followed or service goals to be obtained.

Point estimation: The type of forecasting approach that uses a single point in history to make a future prediction. The point estimation approach is not an accurate means of predicting future call volumes for most centers since it does not account for recent trends.

Poisson: A formula sometimes used for calculating trunks. Assumes that if callers get busy signals, they keep trying until they successfully get through. Since some callers won't keep retrying, Poisson can overestimate trunks required. See Erlang B and Retrial Tables.

Pooling principle: The Pooling Principle states: Any movement in the direction of consolidation of resources will result in improved traffic-carrying efficiency. Conversely, any movement away from consolidation of resources will result in reduced traffic-carrying efficiency.

Predictive dialer: A device used to automate the method of making outbound calls and directing them to an agent when a live person answers. Predictive dialing screens out other responses such as answering machines, busy signals or operator intercepts and records the results. Using mathematical algorithms, the dialer takes into account the number of available agents, the number of lines, talk time and the probability of call results to determine how many calls need to be made to increase agent productivity. Example applications of predictive dialing include collections and telemarketing.

Predictive hang-up: A call attempt initiated at a time when no agent will be available if a call is connected. The call attempt is aborted during the progress and before the customer answers.

Preview dialer: a device that presents the account information and phone number on the screen to allow the agent to “preview” the information before instructing the dialer to dial (or not dial) the call.

Primary rate interface (PRI): One of two levels of ISDN service. In North America, PRI typically provides 23 bearer channels for voice and data and one channel for signaling information (commonly expressed as 23B+D). In Europe, PRI typically provides 30 bearer lines (30B+D). See Basic Rate Interface and Integrated Services Digital Network.

Private network: A network made up of circuits for the exclusive use of an organization or group of affiliated organizations. Can be regional, national or international in scope and are common in large organizations.

Process management: A series of analyses, actions, and tool applied to a way of doing things so that these things will be done more effectively.

Process map: A chart that graphically represents a single business process from start to finish.

Progressive dialer: A device that presents the account information and phone number on the screen after the number is dialed. This dialer is more automated than a preview dialer but less automated than a predictive dialer.

PSN or PSTN (Public Switched Telephone Network): The public telephone network which provides the capability of connecting any two telephones.

Public switched network (PSN): The public telephone network which provides the capability of interconnecting any home or office with any other.

Q.

Quality analyst: A person responsible for analyzing processes and procedures.

Quality monitoring: The act of monitoring telephone and screen activities to ensure they are being handled in a desired fashion. Quality monitoring may be accomplished via active, side-by-side monitoring, or by remote, silent monitoring.

Quantitative forecasting: Using statistical techniques to forecast future events. The major categories of quantitative forecasting include Time Series and Explanatory approaches. Time Series techniques use past trends to forecast future events. Explanatory techniques attempt to reveal linkages between two or more variables. See Judgmental Forecasting.

Queue: The “waiting line” for delayed calls. A queue holds the call until an agent is available.

QuikStaff: The software tool developed by The Call Center School to calculate staffing and trunking requirements and to evaluate staffing and service tradeoffs.

R.

Random call arrivals: The normal way that calls arrive in a call center where there is no particular pattern within a half-hour interval. In statistical terms, the variance to mean ratio equals 1.

Readerboards: Also called displayboards or wall displays. A visual display, usually mounted on the wall or ceiling, that provides real-time and historical information on queue conditions, agent status and call center performance.

Real-time adherence: Measurement of how closely agents stick to their planned work schedule. Real-time statistics are available from the ACD to show the current state of any agent; these states can be compared to agent's schedule to determine adherence at any point in time.

Real-time data: Information on current conditions. Some "real-time" information is real-time in the strictest sense (e.g., calls in queue and current longest wait). Some real-time reports require some history (e.g., the last x calls or x minutes) in order to make a calculation (e.g., service level and average speed of answer). See Screen Refresh.

Real-time management: Making adjustments to staffing and thresholds in the systems and network, in response to current queue conditions.

Received calls: A call detected and seized by a trunk. Received calls will either abandon or be answered by an agent.

Recorded announcement: An announcement heard by callers while waiting in queue. May provide general information about products or services, remind callers what information to have ready, or provide estimate of wait time and a better time to call back.

Recruiter: A person responsible for hiring staff for the call center, reviewing resumes, setting up and conducting interviews and testing, checking references, and so on.

Redial: The act of dialing a telephone number additional times after the initial attempt.

Reengineering: A term popularized by management consultant Michael Hammer, which refers to radically redesigning processes to improve efficiency and service.

Remote agent: An agent physically located outside the contact center. These agents are usually connected to the center on an as-needed or scheduled basis to supply additional answering capability. The agent's equipment is connected to the center using telecommunications links providing the voice and data pathways.

Reporting analyst: A person who takes the information from all the systems and produces nice reports, charts, and graphs (hopefully, with lines that go up).

Response time: In a data system, the elapsed time between the end of transmission of an inquiry message and the beginning of the receipt of the response message measured at the inquiry originating station.

Retention rate: The percentage of customers who initially called to cancel their service, but decided not to after speaking with an agent. Sometimes referred to as Save rate.

Retrial: A caller who “retries” when they get a busy signal.

Retrial tables: Sometimes used to calculate trunks and other system resources required. They assume that some callers will make additional attempts to reach the call center if they get busy signals. See Erlang B and Poisson.

Revenue generation: Making money. See also Upselling.

Revenue metrics: Measures of revenue in the call center.

RFP. Request for proposal: A document prepared by an organization to request bids or proposals from outside vendors for a specified product or service. An RFP will typically describe the current operating scenario, objectives of the product/service to be acquired, and detailed questions regarding the product/service the vendor has to offer.

Ring delay: A setting that can be made on the ACD-PBX that adjusts the number of rings before the system automatically answers the call. When calculating trunk-holding time this delay time must be included for a true total trunk holding time.

Rostered staff factor (RSF): Alternatively called an Overlay, “Shrink Factor or Shrinkage. RSF is a numerical factor that leads to the minimum staff needed on schedule over and above base staff required to achieve your service level and response time objectives. It is calculated after base staffing is determined and before schedules are organized, and accounts for things like breaks, absenteeism and ongoing training.

Round robin distribution: A method of distributing calls to agents according to a predetermined list. See Next Available Agent and Longest Waiting Agent.

S.

Scatter diagram: A chart that graphically depicts the relationship between two variables.

Schedule: A record that specifies when an employee is supposed to be on duty to handle contacts. The complete definition of a schedule is the days of week worked, start time, break times and durations (as well as paid/unpaid status), and stop time.

Schedule adherence: The degree to which agents comply with scheduled start, stop, and break times in their work schedule.

Schedule exception: Any activity not planned in an employee's work schedule, including meetings, training sessions, unscheduled breaks, absenteeism.

Schedule horizon: The time period between schedule creation cycles. Some call centers have short schedule horizons where new work schedules are created weekly while others have horizons as long as six to twelve months with the same schedule plan.

Scheduled callback: A redial established for a specific time in the future.

Scheduling: The process of assigning call center agents to weekly schedules to get the right number of people working at all times.

Screen refresh: The rate at which real-time information is updated on a display (e.g., every 5 to 15 seconds). Note, screen refresh does not correlate with the time-frame used for real-time calculations. See Real-Time Data.

Screen monitoring: A system capability that enables a supervisor or manager to remotely monitor the activity on agents' computer terminals.

Screen pop: Any technology, including IVR, ANI, or CTI, which presents corresponding data on the computer screen simultaneously with the incoming call.

Script: The written words and logic to be followed in the handling of a contact that will assist the agent in maintaining focus on the content of the contact.

Seasonality: The regular, predictable differences experienced in business levels from one period of time to another.

Segmentation: The process of dividing customers into multiple categories so that each category can be treated differently. For example, high value customers may receive faster answer than lower value customers.

Service bureau: A company that handles inbound or outbound calls for another organization.

Service level: Speed of answer goals that are often expressed as the speed of answer to be attained or as some percentage of calls to be answered within some number of seconds (e.g., 80 percent of calls answered within 30 seconds).

Service level agreement: An agreement entered into by two or more parties that defines various aspects of services that will be provided from one to the other.

Service quality: A measure of how well a call is handled, including such measures as consistency and friendliness of greeting, and ability to handle call to completion.

Shrinkage: The percent of paid time that staff are not available to handle calls. Shrinkage must be factored into staffing requirements to account for activities such as breaks, meetings, training time, off-phone activities, paid leave, etc. so that sufficient staff will be scheduled to meet service goals.

Silent monitoring: A process that permits a supervisor to listen to both sides of a conversation including an agent and a caller. Used for determining training needs and performance quality. Neither agent nor caller is aware that the monitoring is taking place.

Single point of failure: When the success or failure of a process (or your entire call center) hinges on any one element, it's said to have a single point of failure.

Six Sigma: A quality improvement program developed by Motorola that focuses on gaining control of a process and attempting to drive defects, as defined by the customer, down to fewer than 3.4 per million.

Skill-based routing: A method of routing calls in which the call is routed to the person best able to meet that caller's needs, rather than simply routing to the first available or longest idle agent.

Smooth call arrival: Calls that arrive evenly across a period of time. Virtually non-existent in incoming environments.

Speech recognition: The capability of a voice processing system to decipher spoken words and phrases.

Speed of answer: The time it takes a caller to get to a live answer by an agent. Measures for speed of answer include service level and average speed of answer (ASA).

Split: An ACD routing division that allows calls arriving on specific trunks or calls of certain transaction types to be answered by specific groups of employees. (Also referred to as gate or group).

Staff-to-workload ratio: The comparison of staff hours to the hours of call workload. In a situation where 125 people are available to handle 100 hours of workload within an hour, the staff-to-workload ratio is 1.25.

Staggered schedules: Schedules in which start times are staggered throughout the hour, such as starting every 15-minute increment of the hour instead of just on the hour.

Stakeholder: Anyone who has a share or an interest in your call center. Includes clients, customers, managers, agents, and so on.

Supervisor: The person that typically has first-line responsibility for the management of a group of agents. Responsibilities include monitoring and measuring performance, coaching, assisting with difficult or escalated calls, and perhaps training and scheduling tasks.

T.

Talk time: The elapsed time from when an agent answers a call until the agent disconnects.

Telecommuting: Use of a telephone and/or computer system in a site other than the main work site that allows an employee perform job duties and to communicate with the office without actually traveling to and from work.

Teleconferencing: A conference between persons remote from one another but linked by a telecommunications system.

Telemarketing: A term typically used to describe outbound telephone sales and promotion - stereotypically

Telephone service factor (TSF): The percent of calls answered in a defined number of seconds. The calculation for TSF may vary depending on equipment manufacturer. The TSF can be compared to the desired service level to determine if goals have been met.

Telephony applications programming interface (TAPI): CTI protocol developed by Microsoft and Intel.

Telephony services application programming interface (TSAPI): CTI protocol developed by Novell and AT&T.

Threshold: The point at which an action, change or process takes place.

Tie line: A private circuit that connects two ACDs or PBXs across a wide area.

Time series analysis: A method of forecasting future events by analyzing past history and trends. In a call center forecasting scenario, past data is analyzed to isolate effects of trend rates and seasonal factors.

Toll-free: A service that enables customers to place calls to an organization without incurring a long-distance charge. Numbers include 800, 888, 877, and 866 dialing codes.

Traffic engineering: The art and science of designing facilities and resources to meet user requirements.

Traffic study: A study to determine the levels of traffic that a system is presently handling. It consists of a count of contracts classified by types (incoming, outgoing, local, long distance). The data obtained is used to forecast future traffic, which, in turn, is used to determining new system requirements.

Transmission control protocol/internet protocol (TCP/IP): The protocols that govern the exchange of sequential data. TCP/IP was designed by the U. S. Department of Defense to link dissimilar computers across many kinds of networks. It has since become a common standard for commercial equipment and applications.

True calls per hour: Actual calls an individual or group handled divided by Occupancy for that

period of time. See Occupancy.

Trend rate: The rate of change experienced from one point in time to another. In call centers, the trend rate is typically calculated as a monthly or annual growth rate.

Trunk: A single transmission channel between two points, both of which are either switching centers or nodes, or both.

Trunk group: Several trunks provided as a group by the local telephone company or other carrier. Generally, all trunks in the group will be in use before a busy signal is returned to the caller.

Trunk hold time: The total length of time that a trunk is occupied by a particular call, from the moment the ringing is detected by the ACD to the moment the call is disconnected.

Turnover: The rate at which employees leave the organization. Also called attrition rate.

U.

Unavailable time: The amount of time the agent is not ready to accept inbound or place outbound contacts. Unavailable time may include breaks, lunches, auxiliary time for processing administrative work, etc.

Uniform call distributor (UCD): A device for distributing many incoming calls uniformly among a group of agents. Generally less intelligent and less costly than an ACD, a UCD will distribute calls following a predetermined logic, for example “top down” or “round robin”. It is typically unable to route calls based on real-time traffic load, or which agent has been busiest or idle the longest.

Universal agent: An agent that can handle multiple types of contacts.

Upselling: Attempting to increase the revenue generated per call by suggesting an increase in service or a complementary product.

V.

Variance-to-mean ratio (VMR): The amount of variance from highest point to the lowest point within the hour or half-hour compared to the average for the period. A high VMR (>1) indicates peaked traffic; a low VMR (<1) indicates smooth traffic; and a VMR=1 indicates random traffic arrival.

Virtual call center: The concept of having network and agent resources that are located at multiple physical sites perform as if all resources were located at a single site.

Visible queue: When callers know how long the queue that they just entered is, and how fast it is moving (e.g., they hear a system announcement that relays the expected wait time). See Invisible Queue.

Voice processing: The technology that allows computers to speak, store human voices, and react to human speech.

Voice recognition system: A telephone system using speech recognition to activate equipment that dials telephone numbers automatically. May be speaker-dependent or independent.

VoIP: Voice over Internet Protocol. A communications standard for sending voice transmission via an Internet communications link.

Voice response unit (VRU): Also referred to as IVR (Interactive Voice Response Unit). A device which automated retrieval and processing of information by phone using touch tone signaling or voice recognition to access information residing on a computer to give a response. The response may be given by a recorded human voice or a synthesized (computerized) voice.

W.

Wide area network (WAN): The connection of multiple computers across a wide area, normally using digital data circuits.

Workflow management: A process that outlines how a task or set of tasks is to be performed. It involves analyzing a task and breaking it down into discrete steps, including what the next step(s) in the process should be.

Workforce management: The art and science of having the right number of agents, at the right times, to answer an accurately forecasted volume of incoming calls at the service level standard set by the call center while minimizing cost.

Workforce management system: A software system that automates the tasks of forecasting calls, determining staff requirements, creating staff schedules, and tracking performance of agents and overall call center.

Workforce planner: The person responsible for forecasting workload and developing work schedules for call center employees.

Workload: For agents, the combination of total conversation (talk) time and after-call work time. For trunks, the combination of ring time, delay time, and conversation time.

World-wide web (WWW): The capability that enables users to access information on the internet in a graphical environment.

Wrap-up codes: Codes agents enter into the ACD to identify the types of calls they are handling. The ACD can then generate reports on call types, by handling time, time of day, etc.

Wrap-up time: The time required by an ACD agent after a conversation is ended, to complete work that is directly associated with the calls just completed. Does not include time for any other activities such as meetings, breaks, correspondence, etc.

Z.

Zip tone: A tone heard before a call arrives, also called a zip tone. Beep tones are sometimes used to announce that a call is being monitoring.

Sources: Call Center Staffing (The Call Center School Press), Call Center Management on Fast Forward (Call Center Press), Call Centers for Dummies (Wiley)]