



Witness Actionable Solutions™

The Back Office: The Next Competitive Battlefield

A Verint Systems White Paper

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Preface

Many organizations underestimate the impact that their back-office operations — the areas that support delivery of products and services sold — can have on their overall enterprise efficiency. Although different departments may handle order fulfillment, applications processing, transaction processing, billing, and collections, inefficiencies in any one department often ripple into others, greatly impacting the speed and cost of transactions — not to mention the customer experience. The back office, with its scale and scope, offers the greatest opportunity for improvements that will deliver higher quality products and services, faster, and more cost effectively.

This paper examines the growing and vital impact today's back-office departments have on customer satisfaction and enterprise success. Find out how organizations can effectively assess and manage their back-office operations to increase productivity, improve throughput, achieve service level agreements, minimize costs, and enhance the customer experience — across varying and distributed departments, systems, and processes.

About Verint Witness Actionable Solutions

Verint® Witness Actionable Solutions™ is the leader in analytics-driven workforce optimization. Its solutions are designed to help organizations capture customer intelligence, uncover business trends, discover the root cause of employee and customer behavior, and optimize the customer experience across contact center, branch, and back-office operations.

Verint. Powering Actionable Intelligence.®

Verint Systems Inc. is a leading provider of actionable intelligence™ solutions for an optimized enterprise and a safer world. More than 10,000 organizations in over 150 countries rely on Verint solutions to perform more effectively, build competitive advantage, and enhance the security of people, facilities, and infrastructure.

Introduction

As we approach the end of the 21st Century's first decade, competition for revenues and profits has intensified, reaching new levels, even as the global economy enters increasingly challenging times. Like never before, the operational mandate is to deliver the most value at the lowest cost in the least amount of time.

One functional business group found in most organizations is ahead of the curve in maximizing value and minimizing cost — the contact center. For over 20 years, contact center management teams have crafted and refined a set of operations management processes and invested in software tools that have helped them become as efficient and effective as possible to meet business and customer care objectives. Enter workforce optimization (WFO) — a business strategy and supporting solution set that brings quality monitoring/quality assurance, workforce management, scorecards, interaction analytics, and more together as a single offering, helping businesses improve productivity, retain and develop staff, and keep customer service and the customer experience as core focal points.

The contact center, however, along with other customer-facing business units, is like the visible tip of an iceberg. Science tells us that only 10 percent of the iceberg's mass can be seen, while the remaining 90 percent is submerged — out of sight and out of mind. Enterprises are like icebergs in that the customer touch points involve only one-tenth the number of employees as do all the employees involved in the remaining indirect, yet customer-affecting, functions. These employees work in the “back office.” For many organizations, the back office represents the largest opportunity for significant improvements in cost reduction and operational excellence.

Given the productivity, cost savings, and management control gained through workforce optimization, why hasn't it moved beyond the contact center until now?

Increasingly, processes, turnaround time, and quality are making the back office the new battlefield among competitive and thriving enterprises.

Part I of this paper will profile the challenges and opportunities of migrating workforce optimization solutions into the back office and will:

- Define back-office functions and challenges
- Reveal the back office's potential for adding greater value to the enterprise and the customer experience
- Review how the back office is currently managed
- Explain how back-office management can be transformed through the application of workforce optimization strategies and solutions

Part II of this paper will explore in greater detail Verint Witness Actionable Solutions' Impact 360 for Back-Office Operations solution, and how it can help optimize the processes, efficiencies, and workforce performance of back-office operations departments through to the broader enterprise.

“Time is the scarcest resource and unless it is managed, nothing else can be managed.”

– Peter Drucker, Management Guru¹

¹ *The Essential Drucker: The Best of Sixty Years of Peter Drucker's Essential Writings on Management*, (Collins Business Essentials) by Peter F. Drucker, July 22, 2008

I. Workforce Optimization in the Back Office

What is a Back Office?

The term “back office” comes from the building layout of early companies where the front office would contain the sales and other customer-facing staff, and the back office housed all other functions, from developing and manufacturing products, to delivering services, to the administration of the organization. All these functions are critical to delivering goods and services, but are unseen by customers. Although the operations of a back office are usually not thought of as strategic, they are typically a major contributor to the success of a business and the customer experience.

Every company has back-office functions. These include the handling of:

- Claims processing
- Customer administration
- Applications
- Payments/statement processing/adjustments
- Loan initiation/processing
- Document and case management
- Order fulfillment/client services
- Accounting/billing
- Inside sales support
- Transaction processing

At a fundamental level, back offices repetitively process large volumes of transactions. These processes can be simple, in/out steps (i.e., posting a payment), or complex, multi-step, multi-touch processes that span days, weeks, or even months (i.e., commercial loan applications and fraud case management). Individuals involved in the processing of work can range from data entry clerks, to auditors, account and case managers, and IT professionals. But regardless the function, the business objectives remain essentially the same — to process the work as quickly and accurately as possible, at the lowest cost, meeting service delivery deadlines, and ensuring customer satisfaction.

The Transformation of the Back Office

Many organizations underestimate the impact that their back-office operations can have on overall enterprise efficiency and the customer experience.

Operational Efficiencies

The back office, with its scale and scope, offers the greatest opportunity for improvements that will deliver higher quality products and services, faster and more cost effectively. As Peter Drucker stated, time is the new dimension of competition. To gain operational efficiency and competitive advantage, enterprises must find ways to:

- Cut cycle/turnaround time and lead time
- Speed time to market, from innovation to execution
- Improve “up” time and response time²

Addressing the efficiencies of the back office is nothing new. Over the past 20 years, back-office environments have been rationalized, re-engineered, digitized, activity-based costed, and Six Sigma analyzed, to name just a few of the efforts and means used to improve operational efficiencies.

² “The Essential Drucker: The Best of Sixty Years of Peter Drucker’s Essential Writings on Management,” (Collins Business Essentials) by Peter F. Drucker, July 22, 2008

Each has garnered benefits for enterprises. What these initiatives and tools have not achieved is delivering management real-time insight into the day-by-day, hour-by-hour incoming activity, actual throughput, and employee productivity that helps managers dynamically make fact-based decisions to improve efficiencies and time management. *A new approach to back-office management is needed to transform the departments and groups that support these sets of functions.* Workforce optimization in the back office can be an enabler of better, faster, and more cost-effective requirements placed on organizations in our hyper-competitive world.

The Customer Experience

Often, issues with back-office processing — such as data entry errors, workflow delays, and billing mistakes — can be the underlying cause of inquiries to customer service departments, such as the contact center, branches, remote offices, and stores.

There is more than mere anecdotal evidence of the link between front and back-office operations when it comes to customer satisfaction and loyalty. TARP Worldwide is well known for its customer experience consulting work. It has repeatedly found that up to 60 percent of customer dissatisfaction sources are found in the back office.³ Forrester Research, in a Consumer Technographics report, states that 17 percent of a customer's loyalty is a result of operational efficiency.⁴ Some experts estimate that between 10 and 20 percent of all the transaction volume in a contact center is the result of execution issues in the back office.

Clearly, where the contact center and back office are linked operationally, it makes good sense to carefully manage both. But even when the linkage is less obvious, back-office operations management is increasingly seen as a critical factor for the timely and efficient delivery of customer service and overall corporate success.

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³ John Goodman, co-founder of TARP, at SpeechTek 2006 and available through: www.speechtek.com/East2006/Presentations/Tues/Music%20Box/11%20AM/goodman01.ppt#310,13,Causes of Customer Dissatisfaction

⁴ Forrester Research's Consumer Technographics®, December 2005 North American Study

Back-Office Management Today

Currently, back-office management is accomplished in siloed, functional groups/departments via a combination of managerial “ESP,” static spreadsheets, and historical reports with sometimes conflicting data. Within any particular function, most long-time operations managers have an intuitive understanding of their full-time equivalent (FTE) requirements, processes, volumes, and seasonality. However, to effectively manage the back office across the enterprise, and fully understand where the opportunities for improvements lie, management needs a broader base of real-time data — a standardized framework in which to understand and compare performance between functions, along with meaningful, actionable reporting.

Challenges

Data Capture — Capturing all the data and activity volumes for a back-office work area is difficult, if not near impossible, in a dynamic, real-time fashion. The various back-office functions each have one or more legacy systems to support them. In addition, some processes are still manual and have no electronic means of determining volumes. Lastly, data from systems may not reflect all of the work activity of employees, as staff are often asked to perform work outside of their production or client/product servicing roles — such as special projects, committee meetings, and coaching and training. Managers are challenged with capturing all of the work volumes and activities into one database from which they can dynamically interpret that data for effective decision making.

Standardized Framework — Managers measure performance by different standards and metrics according to their functions and hierarchical levels within their organizations. Even when a standard measurement system is established, managers tend to explain away issues revealed by bringing forth special conditions, thus businesses are confronted with creating a standardized framework across their back office to be able to accurately represent each department’s performance data and compare performance against standards across functions.

Meaningful, Actionable Reporting — Once organizations have captured all the performance data and created a standardized framework for understanding it, they need to be able to report on it in a fashion that is meaningful and actionable — such as translating it into actions managers can take to improve not only overall performance, but performance throughout the day. Businesses contribute to this by identifying the right metrics or key performance indicators (KPIs). A systematic method needs to be established so these outputs are automatic, credible, and easily obtainable.

Given the current challenges, managers have had to rely on their sixth sense for the ebbs and flows of work in their units, or simply react to changing work loads in expensive and disruptive fashions. Perhaps the single biggest shortcoming is none of the typical decision support reports and tools have any real-time or predictive capabilities. The problems and challenges in back-office management directly lead to:

- High labor costs to process work volumes
- Inconsistent work quality
- Inaccurate forecasting of work completion
- Missed deadlines
- Customer satisfaction issues
- Employee quality, training, and satisfaction issues

Current Technologies

As mentioned earlier, enterprises have been assessing their operations and implementing programs and solutions to improve efficiencies for many years. A number of software solutions have become standard industry tools for managing operations environments, each with their unique benefits and limitations. Very broadly, these tools fall into several categories:

- Business process management systems
- Workflow process management systems
- Imaging systems

Business Process Management

Business process management systems typically consist of a set of tools that permit a skilled practitioner to map out all the steps in a complex process. Then, the entire process can be modeled and simulation technologies can be used to establish throughput capabilities and suggest potential bottlenecks through sensitivity analysis. These are sophisticated tools that can be integrated with available back-office support systems and can help management solve back-office process problems. While these systems can help an organization determine the most efficient manner in which to process work, they cannot tell management the number of employees or skills required to complete the work on an intraday or forward-looking, forecasted basis.

Workflow Process Management

Workflow process management systems approach the back office from a work type standpoint. Data about the work piece (i.e., metadata) informs the workflow process system and is used to determine the correct routing. A key benefit of workflow process management is that pieces of work get sent to staff with the skills necessary to execute the work. A by-product of workflow process systems can be performance data and insights into the work volume and the stages of completion the work pieces are currently in. This can be thought of as an enhanced work inventory control system, letting an organization know what work is currently in the process. These systems cannot, however, tell an organization if the work in process will be completed within deadline, or if there is a need to shift resources to ensure deadlines and service levels are met.

Document Imaging

Imaging systems exist to transform paper into electronic images that can be routed by workflow systems and simulated in business process management systems. Their fundamental benefit is the elimination of time wasted while physical paper is moved from subgroup to subgroup, and the facilitation of easier retrieval of data and work pieces.

Make no mistake, successful back-office operations management can use these tools. But it is highly ironic that none of these tools and management approaches address the volume of work or the people performing the work. Rather, they are all process-centric. Without capturing, monitoring, and actively managing volumes and understanding the capabilities and availability of their staff, back-office managers cannot accurately predict the resources they'll need to complete work currently in process, or forecast future workload and resource needs with great confidence.

In addition, in each of these "systems" approaches, the people actually performing the work are invisible. It's as if they were interchangeable cogs in a giant white collar factory. This could not be further from the truth. Each has a unique combination of skills and knowledge, as well as a unique combination of personality and attitude. Gaining clearer insight into the strengths and weaknesses of the staff performing back-office activities, so that strengths are maximized and reinforced, and weaknesses remediated, is a clear path to better overall organizational performance. What's needed is a systematic, data-driven, people-centric approach that can compliment current technology investments.

Back-Office Management of Tomorrow — the Workforce Optimization Catalyst

To transform the back office, organizations need to build on the solutions that manage and monitor the items being processed, and implement solutions that help them just as effectively manage and monitor their people. The irony of historical back-office solutions shortcomings — that people are largely missing from the equation — is even more poignant given the contact center, as previously mentioned, has already undergone a dramatic transformation in its ability to execute on the mission of delivering quality customer service at the lowest cost through the development of workforce optimization (WFO) tools and disciplines.

In a back-office environment, WFO is essentially a strategy that includes a systematic, data-driven process for aligning work volumes to resources, monitoring the effectiveness and productivity of employees, measuring performance, identifying skill gaps, and delivering coaching and training to improve/remediate those gaps.

In the contact center, WFO includes:

- **Forecasting and scheduling** — Such workforce management helps ensure the right people are in the right place at the right time with the right skills. Using historic volumes and sophisticated forecasting algorithms, the system can accurately predict work volumes by time of day and day of week/month/year. Scheduling involves aligning individual employee schedules with forecasted work volumes, and also confers a predictive capability to help meet organization goals for cycle time that deviations in work volume and conformance to standards have.
- **Quality monitoring/quality assurance** — Desktop PC screens are recorded for subsequent assessment, focusing on conformance to policy, procedures, and best practices, along with screen navigation effectiveness.
- **Performance management** — Scorecards are provided to every employee clearly indicating performance goals and the individual's actual achievement against those goals. These scorecards roll up to inform team leaders, supervisors and department managers, and provide a multi-level view of performance against hierarchical goals.
- **eLearning** — When skill gaps are identified, eLearning delivered to the desktop is employed alongside traditional classroom training to counter any skill or knowledge deficiencies in the most timely and cost-effective manner.

WFO is not a technological fix that can be applied like a bandage to heal an ailing business unit. It is a business process in its own right that is enabled or hindered by the technology infrastructure, people, and surrounding processes. WFO in contact centers has produced strong ROI and positive business results — higher revenues, greater customer satisfaction and loyalty, lower operational costs, and better employee morale and retention.

With the success of WFO in contact centers, it's not a far leap to apply the same discipline and solution set in back-office operations departments. However, there are two problems with that plan: (1) a rich volume and individual performance data source does not currently exist in the back office, and (2) tools and processes need to be modified to recognize the differences between contact centers and back-office departments.

Volume and Data Capture

Unlike the contact center, which has a rich, single source of almost all activity volumes — the ACD or automated call distributor — the back office has no such single source. Each functional department has its own legacy systems, and often, the work is manual with no electronic means of capturing work or volumes processed. In addition, we mentioned the non-production work — such as training, committee meetings, and special projects — which need to be accounted for in a resource capacity plan, but for which there are no current capabilities to track. Integrating all this information into a dynamic data feed has, up until now, been near impossible. Verint® Witness Actionable Solutions™, however, has developed a unique capability to help solve this data capture challenge, called Desktop Activity Management. Its functionality is described in detail in Part II of this paper.

WFO Modifications for Back Office

There are many similarities between the contact center and the back office. Both need to plan resources to meet work demand, at the least cost. Both process work in volume; telephone calls in one and documents in the other. And both have cycle time goals, measured in seconds and minutes in the contact center, and in hours, days, and weeks in the back office.

That may be where the similarities end and where significant differences become quite evident. While the overarching goal for both groups is to deliver service in a timely and efficient manner, the specific objectives and success metrics vary. In the contact center, the objective is to get the customer to the resource with the appropriate skills and knowledge, handle calls as quickly as possible (the metric typically being average handle time), and minimize caller time spent in the queue. In the back office, the specific goals are to process work as efficiently as possible (a throughput metric) and to meet service level agreements (SLAs). SLAs are commitments to internal and external constituents that work pieces will be completed by a certain time or within a certain number of days. For example, a loan application will be processed within seven business days. Or for an institutional customer, for instance, all payments received by 2 p.m. will be processed and posted by 4 p.m. Delivering upon SLAs within budget is a common back-office success measure.

In addition, the back office tends to have multiple organizational structures, each with many processes (50 or 100) that have different processing requirements. To calculate the requirements to fulfill these variable elements, and to factor in the varied skill proficiencies of the organization's resources to generate an accurate forecast of workload and capacity plan, involves a complex algorithm. Moreover, each functional unit has its own standards and KPIs. Building a standardized framework for the myriad of metrics and organizational structures can be much more complex than the contact center, as are the reporting requirements within and across operational areas.

Verint Witness Actionable Solutions, an enterprise software industry leader with a broad patent portfolio, offers the first practical solution — Impact 360® for Back-Office Operations — to the two key problems that have until now prevented deployment of WFO in the back office. Part II of this paper details the solution and its impact on operational efficiencies and the customer experience.

Back-Office Workforce Optimization Realized

Workforce optimization (WFO) in back-office operations is only just taking off. Early adopters are seeing improvements on a number of fronts:

- **Faster turnaround time** — The life services division of a regional insurance provider was able to bring average service time down from nine days to six days with forecasting and scheduling queues established with specific deadlines.
- **Improved quality** — The same life services group, with the ability to improve quality through timely delivery, anticipates a decrease in service calls into its contact center by as much as 30,000 calls, saving an estimated \$300,000.
- **Greater throughput** — One of the U.S.'s largest payment processing banks was able to increase overall volume activity by 11 percent while reducing headcount by six percent, and increasing operating margins by 38 percent by implementing forecasting and scheduling.
- **Improved productivity** — The bill processing department of a large regional utility company was able to improve productivity by 15 percent by monitoring the desktop activities of its employees.

Earlier we stated that WFO is not a bandage. It's a business strategy in its own right. The availability of rich volume and performance data and a set of unified WFO software can help organizations address the common challenges of data capture, standardized frameworks, and meaningful, actionable reporting — resulting in a proactive, cost-effective operation, and transforming back-office management. And it can generate improvement benefits of 15 to 35 percent based on the operational resource cost base.

The back office, with its scale and scope, offers the greatest opportunity for improvements that will deliver higher quality products and services, faster, and more cost effectively.

To remain competitive, this transformation must take place, it's not optional. The back office, with its scale and scope, offers the greatest opportunity for improvements that will deliver higher quality products and services, faster, and more cost effectively.

Time is the new dimension of competition.

II. Verint Witness Actionable Solutions' Impact 360 for Back-Office Operations Workforce Optimization Solution

Verint's Impact 360 for Back-Office Operations takes the traditional components of workforce optimization (WFO) — including forecasting, scheduling, and capacity management with quality and adherence tracking, performance management, and eLearning — and adapts them for the unique challenges of back-office operations. In addition, Verint has added a new component to address the data capture challenge: Desktop Activity Management.

Forecasting and Scheduling

Within the forecasting and scheduling module, the software tracks work volumes by workflow process and by time interval. Using stored work volume histories, it produces accurate forecasts of future work volumes for selected time intervals. Management has the ability to alter system-created forecasts based on information unavailable to the forecasting algorithm, like upcoming marketing plans for a new product launch. When consensus is reached on the demand forecast, attention turns towards employee scheduling.

Within the scheduling functionality, each employee is defined in terms of his/her skills, relative proficiency within that skill, supervisor, shifts eligible to work, and individual schedule preferences for start time and days off. The actual scheduling process uses advanced simulation technology where schedules are organized, and the software simulates the flow of work considering the beginning backlog and the arrival of new work in each time interval. It then scores the set of employee schedules against criteria that include the ability to meet service level agreement (SLA) goals using the fewest paid hours. The scheduling process is reiterative, and in typically less than 10 minutes, a set of optimized employee schedules is produced.

By combining forecasted work volumes, actual work volumes, and employee schedules, the system enables managers to dynamically monitor and manage workloads to help ensure SLA achievement for each process or work queue. The management dashboard for a back-office manager provides the ability to view actual volumes, backlog, resource availability (FTEs), and service level targets — all on a single screen.

Frequently, however, the actual work entering the business unit will be higher or lower than predicted, sometimes by enough that it places goals at risk or causes the unit to absorb higher labor costs owing to excessive idle time or the requirement for overtime. What's even more likely is employees not always following their schedules. They may be present, but not doing planned work, or they may be altogether absent. The solution keeps track of each employee's adherence to schedule and clearly shows where schedule issues occur and who is involved. It then recalculates the impact of these changes to the work plan on the unit's ability to meet its goals. This predictive, intra-day capability is unprecedented.

Capacity Management

Capacity management takes the forecasting and scheduling data and creates “what if” modeling. The “what if” capability helps back-office managers contemplate various operational models using different workflows and employee skill levels. Combining workflows into higher volume streams can be tested against cross-trained employees for unit cost comparisons. Strategic planning decisions can then be supported by modeling future forecasts with growth targets, new product launches, acquisitions, consolidations, hiring plans, and so forth.

Forecasting, scheduling, and capacity management software within an optimized back-office department helps transform management from being reactive into a more controlled, less volatile, more deliberate mode. As beneficial as that may be, forecasting and scheduling is mostly about the workflow processes, people you already have, and the skills and knowledge those people possess. A perennial question is: how does management develop a better team to meet volumes and deliver service more economically? When all the components of WFO software have access to the data coming from employee PCs, as well as existing back-office systems and built-in data capture applications, back-office management moves to a higher level.

Quality Monitoring/Quality Assurance

Quality monitoring in the back office assumes slightly different characteristics — more along the lines of quality assurance, and even volume and data capture. It becomes an analysis tool to be used by supervisors and trainers to assess individual skill gaps with enough precision to formulate remedial training that is both targeted and cost effective. While there usually are no telephone conversations to record in back-office operations, there are lots of employees using software applications on their PCs — which is why screen recording is so important.

Supervisors, department managers, systems analysts, and trainers can set up defined business rules that trigger screen recording. They may be interested in reviewing the screen recordings of a team member they have been working with to improve one particular aspect of requisite skill sets.

Trainers may simply want to review a cross section of staff when they are using a new application and after initial training has taken place. With this focus, they gain insight into what parts of the training program are working well and which parts need improvement based on observing actual use.

Systems analysts may wish to focus their attention on the way, and ease in which, employees navigate the application’s screens and fields.

Compliance and fraud officers can use screen recording for compliance documentation and for fraud tracking and due diligence.

Quality monitoring/quality assurance also features functionality that helps create automated assessment forms. The use of such forms can help ensure all reviewers are calibrated and in synch about key focus areas, including such aspects as compliance to policies, procedures, and best practices.

Performance Management

Between the rich individual performance data captured through forecasting and scheduling and the ability to assess back-office employees' use of their software applications through targeted screen capture and review, management is exposed to many more measures and metrics. These are in addition to various reports and data syntheses that regularly cross the desk. Performance management then assembles all the available data and provides feedback to employees in the business unit about how they are doing against expectations.

Each employee has his/her own scorecard, available through a standard web browser. Scorecards include key performance indicators (KPIs) tied to clearly defined goals. The employee's current performance against the KPI is displayed, together with a trend arrow indicating improvement or regression over time. There is also information in aggregate as to how the employee's peers are performing against KPIs.

The power of a scorecard in helping motivate employees and shape their behavior is surprising. People are remarkably capable of self-deception about how they are performing in the absence of clear feedback. Many back-office employees receive little feedback and often only a few times a year. A scorecard cannot be ignored. Employees will take more ownership over their own performance and will begin to demand coaching from their supervisors.

In addition, these scorecards can be rolled up to the team, department, business unit, or entire back-office operations, giving management unprecedented insight into the performance and achievement of key performance metrics across the back office. Variance reporting at the higher level can identify areas for corrective action and opportunities to improve efficiencies across the enterprise.

eLearning

In an optimized workforce environment, coaching and training can place strains on management. There simply isn't enough time to perform all the coaching tasks that present themselves. eLearning is an impactful tool, and one that can be used to augment available coaching time — as not all performance issues require personalized one-on-ones.

During recorded screen reviews or when reviewing team and business unit scorecards, it may become apparent that certain employees might benefit from some remedial training. The eLearning functionality can be thought of as an intelligent jukebox that dispenses not music but desktop learning lessons. Content prepared to industry standards is distributed to employees after having the courses assigned by managers. eLearning helps keep track of employees' progress towards completion and tracks test scores to gauge new skill proficiencies and application.

An important ancillary use of eLearning is to employ it as the mechanism for all written communications with staff. Messages and documents about policy and product changes are routine in back offices. Using ordinary email to disseminate this information is risky because you never really know if employees read and comprehend what is being conveyed. By using eLearning to deliver these communications, management can be assured that every employee has read the document — with a comprehension test included on the back-end to help ensure understanding of the content.

Desktop Activity Management — Unlocking Volume and Individual Performance Data

Verint Witness Actionable Solutions has provided call recording/quality monitoring solutions for many years. An integral part of these solutions is the ability to capture and record PC screens. Avoiding an elaborate technological discussion, suffice it to say that the company has developed and patented an extensive portfolio of software technologies associated with starting and stopping recording based on the contents of certain fields on screens or the appearance of certain screen pages.

Oversimplified, this technology can create a stream of information about what employees are doing with applications on their PCs and convert that information into work volume and individual performance data. The volume data can supplement data from legacy systems, workflow and imaging systems, and/or fill in data holes where system volumes are not available. The depth of volume and individual performance data depends on the level of data granularity desired by the back-office management team. In some organizations, it's enough to know what applications are being used, when and for how long. In others, management will want to know how each employee is performing in each step as they move through a back-office process. In either case, reporting is available to the level of detail your business requires. System administrators capture sample screens used in the back-office applications and define "triggers." A trigger can be, for example, an application screen, a particular screen within an application, a field being accessed on a screen, particular data being selected or entered on a screen, hot key depressions, or non-floating menu choices.

When a trigger is encountered, the technology records and time stamps the screen and populates data fields while building a log. Periodically, the log is sent to a server, where similar data from other employees is also arriving. This data can then be converted into work volumes for intra-day management and monitoring of workload and SLA achievement, as well as volume data for future workload forecasting.

If management wants more detailed performance data, the system administrator can be provided with additional tools that permit the triggers to be placed into simplified process maps that identify the various process steps.

Verint technology transforms the employee's PC from what was a previously unavailable source of volume and performance data. Organizations make substantial investments of time and money in software, customization, process definition, and training to help ensure individuals are trained and scheduled to meet work volumes and effectively execute business tasks. Most organizations have very little visibility into how these business tasks are completed and how employees interact with the business applications at the user level. Now they do.

Consider the utility in having a report for every employee in the back office that shows usage for a particular software application including when it was in use, for how long, and during what part of the day. This information can then be used to determine if employees are being productive and utilized to their fullest potential. There has never before been this kind of performance data available in the back office.

If more granular data is desired, this information can be broken down to show how each employee performs each step inside a business process. Comparisons can be made among like-skilled employees to determine recognitions and rewards, as well as identify areas for focused coaching and training. In addition, tracking and recording process steps can help managers verify adherence to compliance and authorization requirements of an organization or particular industry.

As exciting as this is, in a broader context, it is simply another set of performance reports among a number of existing performance reports, albeit providing much better individual data. The real value of unlocking the volume and individual performance data from each employee's PC is that it can be used seamlessly by the other key applications in a workforce optimization suite.

Conclusion

The dynamics of customer service operations are changing. End customers are more demanding, and more often than not, the quality and level of customer service delivered goes well beyond the “front office” contact center. While the contact center still continues to be the primary point of entry, it is tightly coupled with back-office customer service operations. This has presented a new challenge for customer service executives. They now need to efficiently manage more connected and complex customer service processes and operations to deliver the expected quality of service at the lowest possible cost, while maintaining employee and customer satisfaction.

Contact centers have had a 20 year head start when it comes to using workforce management (WFM) systems and more recently workforce optimization (WFO) solutions and practices. They have had the luxury of systems like the ACD that have provided detailed volume and handle time details. This information has been used by WFM systems for forecasting, scheduling, capacity, and productivity planning purposes. Most back-office customer service operations have neither the same level of sophistication nor the standardized set of systems that provide a rich set of data that can be used for planning and performance management purposes.

Verint Witness Actionable Solutions’ Impact 360 for Back-Office Operations solution — comprised of unique software and best-practices consulting services — helps counter and address this problem for back-office customer service operations. It’s a practical solution for helping your organization become more effective and efficient, improve throughput, achieve SLAs, retain and develop staff, and importantly, enhance the customer experience.