

## The Executive Level Report for Telemarketing Services

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### Overview

Effective management of teleservices can produce superior results at lower costs. The information and the delivery of the information are no longer pie in the sky technology. An executive can have the data delivered computer ready for spreadsheet preparation or delivered automatically by fax ready for review at the executive's office. There is no longer the need for a wizard to interpret the bottomline information the Executive needs to manage and ask insightful questions.

As any executive in today's computer age is aware, there is an overabundance of information available about everything imaginable. However, raw information is useless unless placed in a form that is concise, readily understandable and effectively summarizes the subject matter. The stereotype of the vice president, with bookshelves of computer generated reports, calling an assistant to explain the meaning of the reports is reality in many firms. The teleservicing industry specifically has mastered the art of providing a bulk of information to overwhelm and baffle clients. The majority of this information is of little value for the executive level manager.

Effective management information must take these forms:

- A. Executive Summary Reports, often in graphical form, that relate both the good and the bad about teleservicing operations,
- B. Executive Category Reports, often in graphical form, relating to groups of information presented in the Executive Summary Reports, and
- C. Detailed information stored on the computer that can be readily selected and expedited to various departments and suppliers. Database information available for electronic spreadsheet is ideal for this purpose.
- D. All information must be very timely available at all departments and locations.

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## Executive Summary Reports

Generally, the summary information represents trendlines of a bellwether criteria measured over a period of time, such as a one year period.

The Effectiveness Chart (Fig. 1) shows, by period, both the number of calls received and the Completed Calls<sup>1</sup> such as orders, literature requests, etc. This not only establishes the trend in telephone traffic, but also discloses trends in the effectiveness of the way calls are handled.

A derivative of the Effectiveness Chart (Fig. 1) is the Yield Chart (Fig. 2). This chart reflects the disposition of all calls received including calls not answered, those abandoned on hold, wrong numbers, pranksters, incomplete calls and Completed Calls. The objective of a telemarketing service function is to maximize the Yield, the percentage of all calls that result in Completed Calls. A

### Effectiveness Chart

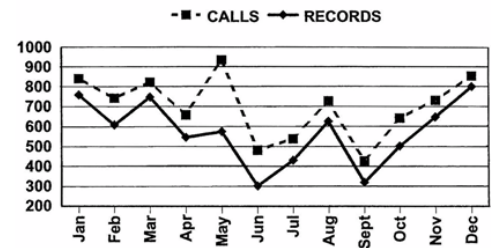


Figure 1

decrease in the Yield is an immediate indication of an unfavorable situation. Where different outsourced facilities have different Yields, consideration should be given to terminating the services of the supplier having the lower Yield.

### Yield Chart

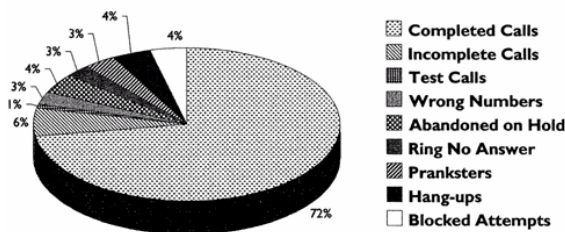


Figure 2

requirements of the teleservices mission statement. Callers that hang up on hold or that call multiple times for the same problem will increase the overall cost but not the number of Completed Calls. These situations would be reflected in an increased cost per Completed Call. The Cost per Completed Call Chart (Fig. 3) will also indicate whether a teleservices unit has insufficient resources for the task. If, for example, callers are abandoning on hold, and toll free costs for placing callers on hold are increasing, there will be an increased cost for each

A third chart shows the Cost per Completed Call (Fig. 3). This is the total cost of teleservices, less fulfillment and promotion, divided by the Completed Calls. This chart will indicate the cost trend in handling calls that meet the

### Cost Per Completed Call

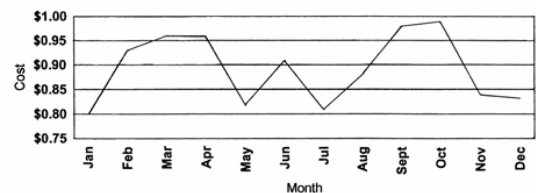


Figure 3

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<sup>1</sup> Some firms refer to the number of “calls answered” as “completed calls.” Completed Calls, as used herein, is distinctly different and includes only calls where the caller was satisfactorily serviced as to the target application. It does not include calls answered but not completely serviced, such as calls abandoned on hold, hang-ups, wrong numbers, etc.

Completed Call. But beware! Reduced costs per Completed Call can also indicate insufficient resources. If there are only a few lines and a small group of agents, the cost per Complete Call will also go down, because the caller will get a busy signal. The agents are operating at peak efficiency, because they are always backed up with a call waiting, to the detriment of your calling client.

Thus, this trend line will point out changes. By itself it will not indicate the reason for the problem but that something significant has changed. At this point the executive references the Executive Category Reports.

### Executive Category Reports

This secondary level of executive information is generally designed to highlight the source of changes evident in the Executive Summary Reports. The Executive Category Reports tend to be more specialized for a particular application.

### Load Report By Day

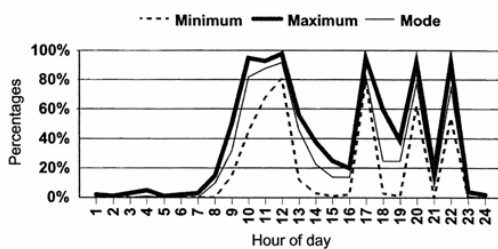


Figure 4

An example of a Category Report is the Load Report by Day (Fig. 4). This shows the percentage of daily calls that are received by hour of the day. Optionally, the Load

Report by Day (Fig. 4) also shows the range of the day to day variation from the mode. The significance of using percentages rather than absolute numbers is that changing patterns are not obscured by the day to day changes in the absolute values. What this chart might show at a glance, for

example, is that Monday morning is always busiest, regardless of the total call volume. Changes from that pattern would explain changes in one or more Summary Reports.

Another example is the Completed Calls by Category Report (Fig. 5). This shows the mix of types of calls categorized as Completed Calls. If, as an Operations Executive, you noticed the Yield improving and the cost per Completed Call decreasing, your first reaction might be to rejoice. However, The Completed Calls by Category Report (Fig. 5) might show there has been a change in the mix of calls. A lower percentage of expensive and complicated catalog orders were being taken because, unknown to you as an Operations Executive, the Promotion Department has advertised the number for ordering free catalogs, which is a relatively quick and inexpensive call, changing the usual mix.

### Completed Calls by Category

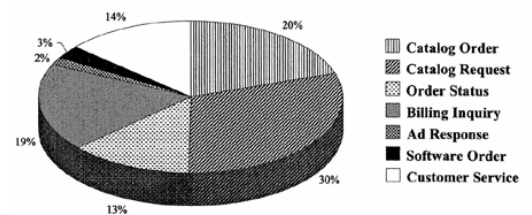


Figure 5

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## Detailed Information

Detailed information must be immediately available and must be in a form that can be immediately imported into a commercial spreadsheet. The days when voluminous weekly printed reports, in a fixed form, would be prepared for distribution have become the dinosaurs in the teleservices industry.

For example, if the results of a television campaign are monitored by the marketing department, reports of calls received on an hour by hour basis are largely inconclusive, even if received immediately. What is useful is the pattern of calls received throughout the period in question, in the Call Activity Chart (Fig. 6).

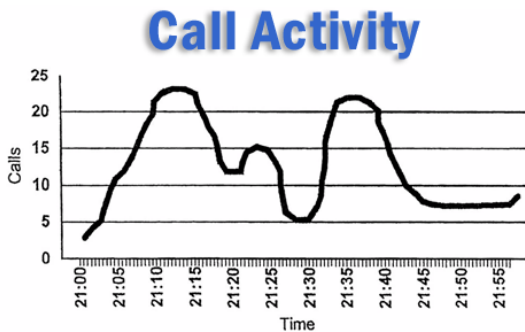


Figure 6

Then the effects of the ad content, the placement of the ad and the mix of callers, among other factors, can all be determined. If the marketing department processes this information immediately, decisions can be made to revise copy or promptly change ad placement. On the other hand, when the information is received the following week in printed form, only curiosity is satisfied.

In an overflow call handling situation, management may want immediate information about the numbers and types of calls being transferred to the remote center. This information can then be used to determine whether staffing should be increased to meet increased call handling needs at the main center. Agents can then be scheduled for call backs based on actual load and timing requirements.

Often today with 800, 877, and 888 numbers now available, a significant number of callers dial the wrong toll free number. Management needs to know this immediately if it is to remedy the problem or control expenses associated with handling wrong numbers.

The advertising agency needs to know the source of Completed Calls immediately so that markets can be targeted and ad schedules changed. This requires a unique report typically by area, by source, and by time. These specialized reports enable individual departments to better do their job with a detailed database of information and to answer questions raised by the Executive Summary Reports.

## Timelines of the Receipt of the Data

Timeliness is the key to truly effective reports that can be acted upon and not solely used for historical review. The information must be complete, including information about calls NOT successfully completed, and received in a timely fashion by each interested department.

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This can now be accomplished at low cost, without delay, by having the information electronically transmitted to multiple locations. For example, the information needed for the Executive Summary can be transmitted from the teleservices center to the Executive Office directly. The marketing information can be transmitted electronically to the Ad Agency. The operations information can be transmitted separately to the clients sales department and so forth. In such fashion, each department can have the information it needs when it needs it, and no one department becomes dependent on the other for its reporting needs.

## **Summary**

Effective management of teleservices can produce superior results at lower costs. The information and the delivery of the information are no longer pie in the sky technology. An executive can have the data delivered computer ready for spreadsheet preparation or delivered automatically by fax ready for review at the executive's office. There is no longer the need for a wizard to interpret the bottom line information the Executive needs to manage and ask insightful questions.

ConServIT Integrated Teleservices, a service of Conversational Voice Technologies Corporation, is a leading provider of advanced teleservices and database management services. For more information, contact ConServIT, 4205 Grove Avenue, Gurnee, IL 60031. Phone 847.249.5560 or e-mail [sales@conservit.com](mailto:sales@conservit.com).