

Insightful

Overview

TASKE Reports Provide In-Depth Analysis of Contact Center Activity >

ClearPoint Credit Counseling Solutions is a non-profit organization that has been providing clients with budget, debt and housing advice for over 40 years. Headquartered in Richmond, Virginia with 42 branches in 12 states, ClearPoint’s counselors help consumers identify the causes of their individual financial problems and make a plan to address them, coordinating with a range of vendors. Services are available nationally by telephone and Internet, and face-to-face at branch locations.

The organization has four contact centers across the United States running on the Cisco UCCX platform: Richmond (Virginia), Syracuse (New York), Los Angeles (California), and St. Louis (Missouri). Together, these contact centers employ approximately 200 agents and 15 supervisors.

As a long-term TASKE customer, ClearPoint used the TASKE solution with a different telephone system platform prior to moving to Cisco UCCX in 2009. While the company leverages the complete TASKE solution, including TASKE Real-Time, Visualizer and Desktop applications, the company makes extensive use of the reporting capability offered by TASKE Contact.



TASKE Contact

Richards values the ability of TASKE to meet ClearPoint’s requirements, regardless of the telephone system platform it’s running on. Because the company has been successfully using TASKE since 2005, the company wanted to continue using it when changing from a different platform to Cisco UCCX. Richards found that not only was the migration itself easy and seamless, but the TASKE solution allowed the company to extend the reporting functionality over that available from Cisco.

Situation

Reports Do Not Provide Visibility into Queue and Agent Performance

Typically, callers who are contacting ClearPoint’s contact center agents are under significant financial stress. It’s critical that callers do not experience long wait times in queues, and that agents properly handle the callers’ issues. Every incoming call represents a potential sale, and high abandon rates or poor call handling directly affect the company’s service levels. For this reason, ClearPoint must be able to evaluate queue and agent performance on a frequent and ongoing basis to correct issues as soon as possible.

Although the company tried to use the reports already available with Cisco UCCX, they were not able to obtain the required information. In addition, the manual manipulation required to produce reports made the process cumbersome. This overhead meant delays in distributing reports to stakeholders who needed to act on the information. John Richards, IT Director, says, “The reports don’t provide enough information to run a business on. Over the last several years, there’s been no innovation.”

TASKE Reports Provide Snapshots that Provide Clear Insights

ClearPoint relies on TASKE reports to provide the snapshots of queue and agent activity necessary to evaluate performance on a regular basis. Joe Gan, IT Systems Administrator says that not only does he run TASKE reports on queues and agents every day, but he reports on them for a variety of time periods, such as by half-hour, hour, by day, by month, and so on.

For example, Joe runs reports on the “new client” queue each morning to determine what happened the previous day. He looks at the number of calls offered, answered, and abandoned over each half-hour period, and uses this information to determine when and why the contact center lost calls. If he



sees a trend where the number of abandons tend to spike during a particular time of day, more agents are assigned to the queue during that time period to reduce the time that anxious or stressed customers are waiting in the queue.

Joe also reviews agent talk time and availability at the queue level. He can quickly drill down to report on activity for an individual agent when he needs to investigate the possibility that the agent is not closing enough business. The detailed agent report shows him when an agent logged in and out, their number of calls and average call duration, as well as their reasons for being unavailable to take calls. He may find that an agent is taking too many breaks or requires longer than acceptable time to update information related to a call.

Reports produced by Joe are widely distributed to keep all stakeholders — including call center managers, counseling group managers, and other directors and managers within the company — informed of contact center activity. Depending on a particular stakeholder’s requirements, these reports may provide information on a daily or monthly basis. Joe appreciates that TASKE reports provide the flexibility to produce a snapshot of what was happening for any resource, during any time period.



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“ TASKE reports provide the flexibility to produce a snapshot of what was happening for any resource, during any time period. ”

Joe Gan, IT Systems Administrator

ClearPoint relies on TASKE reports for a clear understanding among stakeholders of queue and agent performance. Reports are run on a daily basis and for various time periods to quickly address any issues in recent activity. Low wait times and abandon rates, and successful handling of every call are directly related to ability of the contact center to close business. TASKE reports provide snapshots of activity, with the flexibility to highlight specific resources and time periods, as required.



TASKE is a member of the Cisco Developer Network as a Solution Developer and has products which have been tested compatible with Cisco Unified Contact Center Express (UCCX). Visit taske.com for more information.