Contact Center Questionnaire

Human Numbers is grateful for the opportunity to work with your contact center. We are dedicated to helping you meet your forecasting and scheduling goals and request that you complete the following questionnaire in preparation of the work to follow.

We understand you may not have immediate answers to all of these questions; just complete it to the best of your ability. If you need clarification about any of the data requested, please contact us at 770-887-8802

Company and Contact Information

Company Name		Survey Completed by:	
Address		Name	
City, State, Zip		Title	
Phone Number		Email Address	

Contact Center Information:

Address (City/State)	
Operating Hours	
Number of Agents	
Full time and part time %	
What types of calls do you handle? (check all that apply)	
☐ Inbound ☐ Outbound ☐ Blended	
Last Year's Call Volume (include abandons, too)	
This Year's Forecasted Call Volume	
Outbound %	
Describe products/services offered by your center	
Is an outsourcer used? If so, % of calls, how routed, etc.	

Goals, Metrics, and YTD Results

	GOAL	YTD RESULTS
Service Level or ASA		
Abandonment Rate (%)		
Average Talk Time (Inbound)		
After Call Wrap-up Time (Inbound)		
Average Talk Time (Outbound)		
After Call Wrap-up Time (Outbound)		
Occupancy or Utilization %		
Overtime Ratio		
Attrition Rate		

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Agent Data	
List any non-phone activities that agents handle (email, fax, etc.)	
Are any agents multi-skilled? (list each skill)	
How long does it take to train a new agent?	
Do existing agents participate with on-the-job training of new agents?	

Technology	
WFM Software Vendor, version #, and any optional modules	
Who is the ACD/PBX Manufacturer?	
List any additional components that interface with WFM (payroll, QA, IT, etc.)	
WFM Servers: Manufacturer and O/S.	

Additional information that you could begin collecting now and will be helpful at the time of our kick-off meeting includes:

- WFM Job Descriptions
- Access to historical data including volumes, handle times, abandons, and service results for each forecast group:
  - o Interval Data for the past six weeks
  - o Monthly Data for the past 24 months
- Any existing staffing models, forecasts, and schedules in production today
- Scheduling assumptions, and any special schedule compliance rules. We need schedule spans, lunch and break details, and special exceptions that are in place (ex. day care/school)
- Schedule Adherence actuals and goals.
- Human Factors: historical or planned information about
  - o Vacation
  - o Absenteeism
  - o Training/Coaching/1:1s
  - o Meetings
  - o User Testing, QA Reviews
  - o FMLA (planned and historical)
  - o Productive IBC (in-between call) time (ex. Reading emails)
  - o Anything else that takes your agents out of the building or away from the customer