

What is a contact centre audit

and how do you conduct one?

By Deepak Selvaratnam,
Contact Solutionz

In the previous article, we detailed the benefits of conducting a call/contact centre audit. This article describes such an audit, how an audit process is conducted and lists a few potential outcomes.

What is a contact/call centre audit?

It is a structured business process that examines workings of the centre from end to end.

The call/contact centre audit is no different in approach to that of health and safety audit or the financial audits that many organisations are familiar with.

What does an end to end review of the call centre mean? The table below lists the areas to be audited and is applicable to a centre of any size.

THE CONTACT CENTRE AUDIT GUIDE

- Objectives, strategy, business process and contingency planning
 1. Corporate objectives and strategy fit
 2. Call/contact centre objectives and strategy
 3. Business process alignment
 4. Disaster recovery plan
- Customer contact and relationship management and customer satisfaction measures
 1. Customer contact and relationship management
 2. Customer complaint management
 3. Customer satisfaction
- Health, Safety and Environment - physical environment, physical and mental well being
- Contact centre structure
- Recruitment, remuneration and career development
- Training
- Internal communications
- Operational measures
 1. Scheduling and resource planning
 2. Service measures
 3. Reporting - contact centre metrics
 4. Contact volumes and costs
 5. Call and contact flow monitoring and management
 6. Call and contact quality management
 7. Quality of voice messages, automatic response and other customer contact
 8. Technology
 9. Quality Strategy and process analysis
 10. Planning and objective Setting (includes financials)

There are 8 main areas and approximately 15 subsets within these eight major areas. Overall there are between 350 - 750 variables that require review depending on the nature and type of industry. (Snapshot - Contact Solutionz model)

Often other functions review areas or slices of the centre, seldom is a complete end to end review carried out. Finance and auditing would focus on processes, budgets and costs. Human resources from the point of view of recruitment, personnel and administration and perhaps health and safety. Marketing may focus on customer feedback and contact management and other areas of the business depending on the type of industry. Whilst these may be robust functional processes which support and cover various aspects of the call centre, none perform an end to end review from a centre perspective.

HOW THE AUDIT PROCESS IS CONDUCTED

The approach to the audit is not dissimilar to a financial audit. Audit objectives are set out at the beginning and a timetable drawn up for each phase. A list of documents and information required will be set out prior to the commencement of audit by the auditor/assessor. The approach followed would be in phases of information gathering/data collection, analysis, verification and reporting. The information/data collection phase encompasses listening and observation of CSR's, interviews with key personnel, collection of statistics and business processes. The analysis phase which can run concurrently to the data collection and verification phase, attempts to identify