



Short introduction COPC

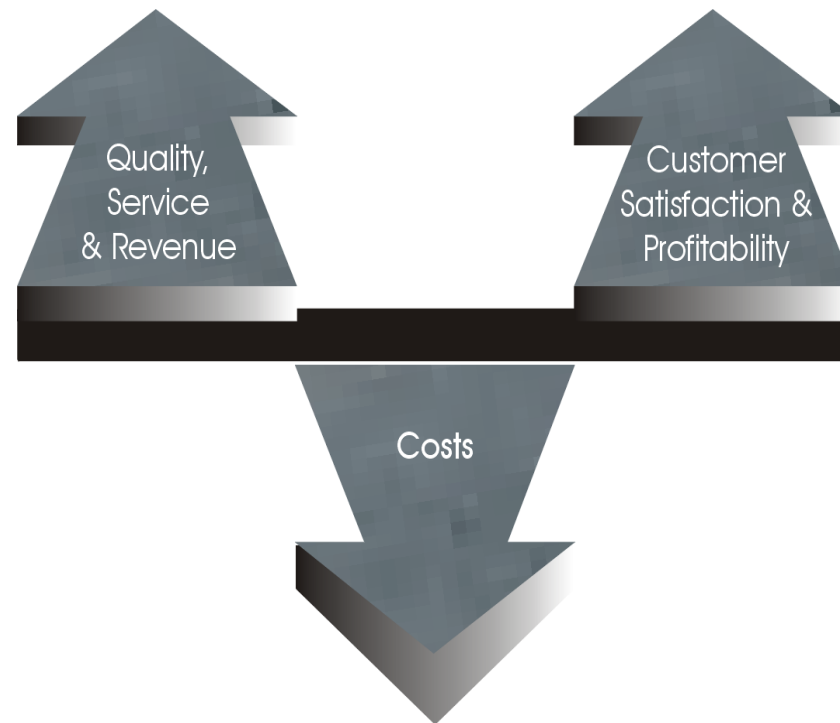
June 2024

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- COPC Framework 4.3
- Target setting and High Performance Benchmarks
- 50/75 rule
- Cat 4.0 Items and Exhibit 1 Highlights
- Pareto

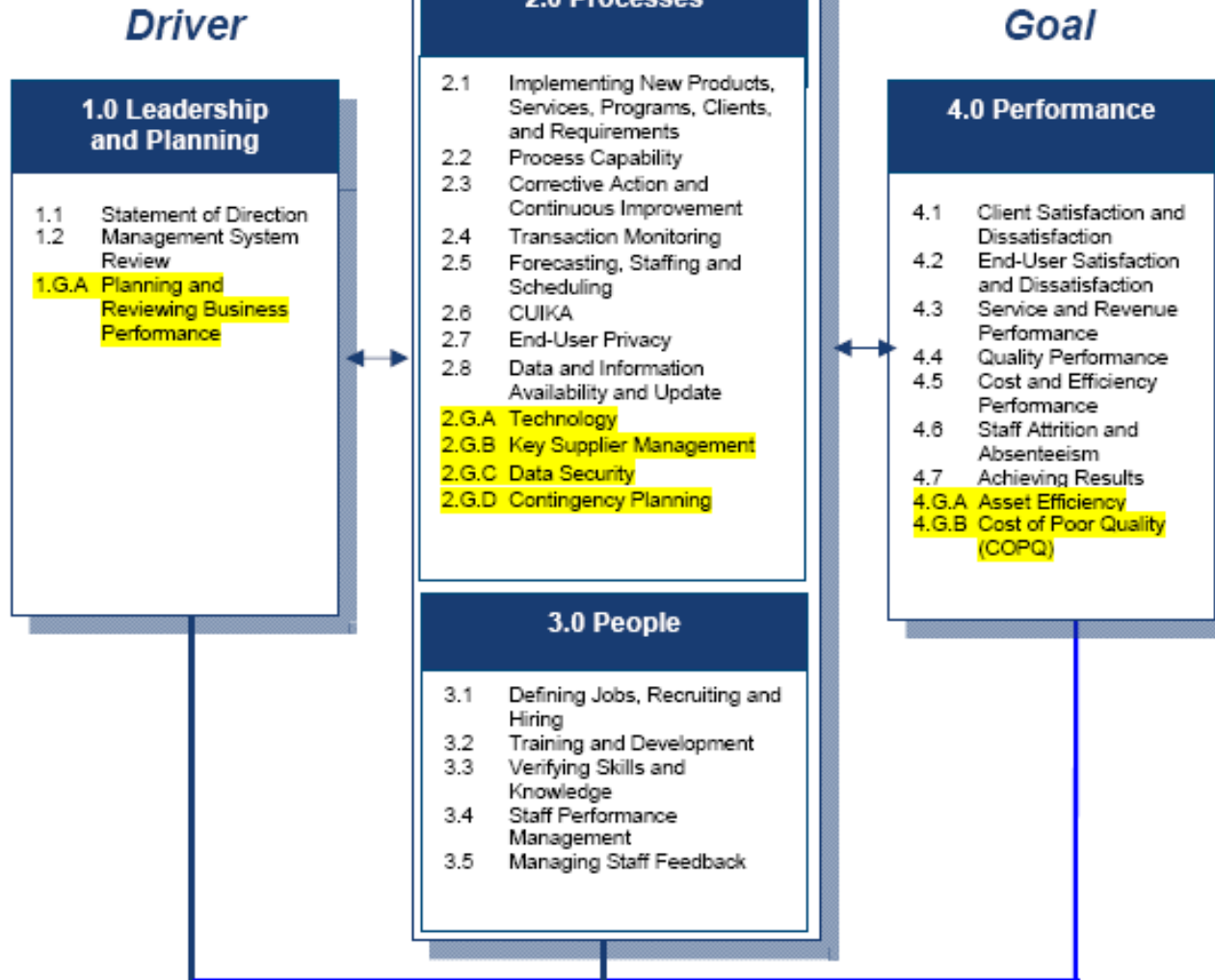


COPC has shown evidence



COPC Framework Release 4.3

Enablers



2.6 CUIKA Target setting

4.1	Client Satisfaction	High Performance Benchmark
4.2	End User Satisfaction/Dissatisfaction	High Performance Benchmark
4.3	Service Level for Phone	Based on End User Expectation – End User Satisfaction
4.3	Service Level Non-Phone	High Performance Benchmark
4.4	Quality – Critical and Non Critical	High Performance Benchmark
4.5	Utilization (Efficiency)	High Performance Benchmark
4.5	Other Efficiency Metrics	Set by analysis of past performance – intent to improve
4.6	Absenteeism and Attrition	Set by analysis of cost or impact to Service Quality or EU Sat (How much a company can afford)



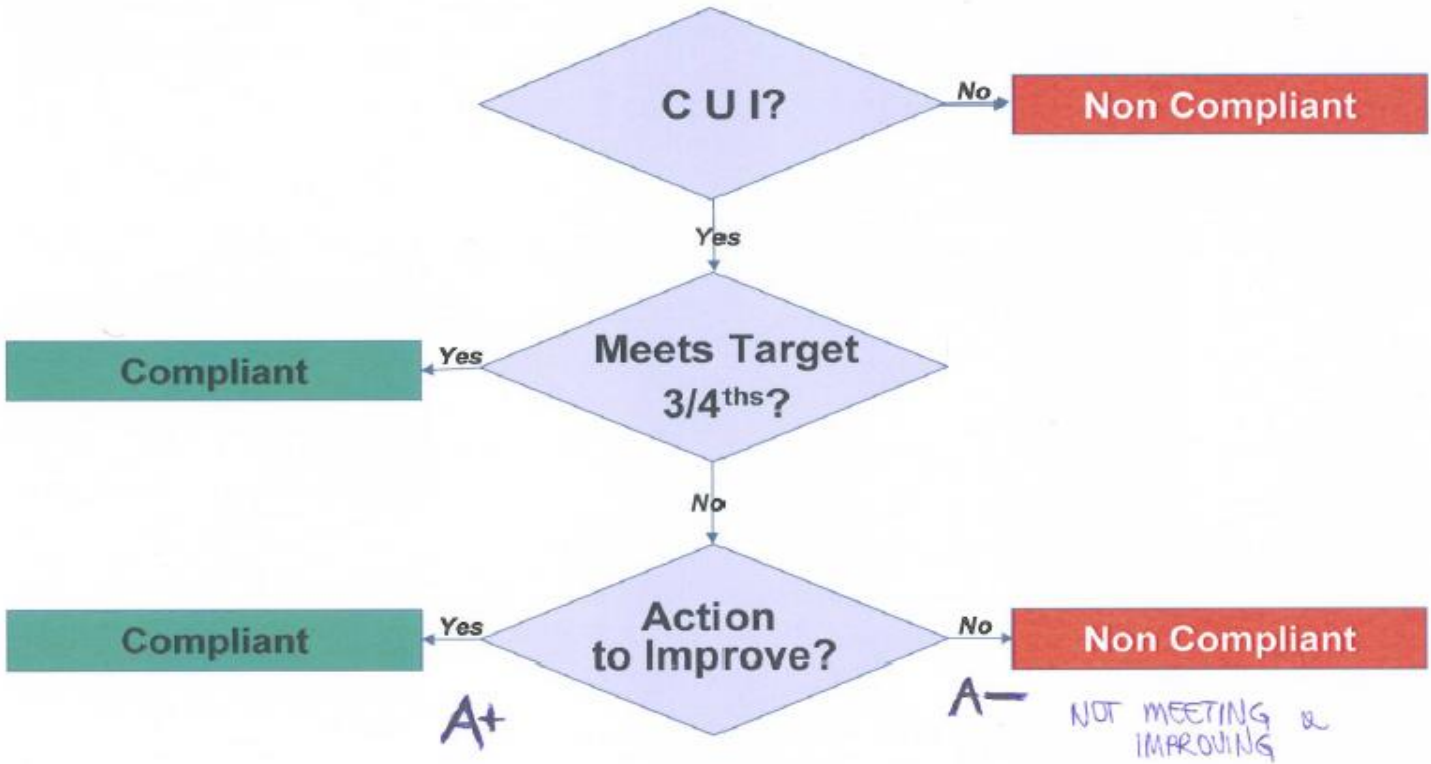
COPC High Performance Benchmarks

4.1	Client Satisfaction	80% Top Two Box (on a 5 point scale with neutral midpoint)
4.2	End User Satisfaction	85% Top Two Box (on a 5 point scale with neutral midpoint)
4.2	End User Dissatisfaction	2% Bottom Box (on a 5 point scale with neutral midpoint)
4.3	Non-Phone On-Time (Service Level)	95% On-Time for any cycle time requirement
4.3	Non-Phone Backlog	1 cycle late but no more than 24 hours late (depending which is shorter)
4.4	Critical Error Accuracy	98%
4.4	Non-Critical Error Accuracy	95% (By Opportunity)
4.5	Utilization (Efficiency)	86%



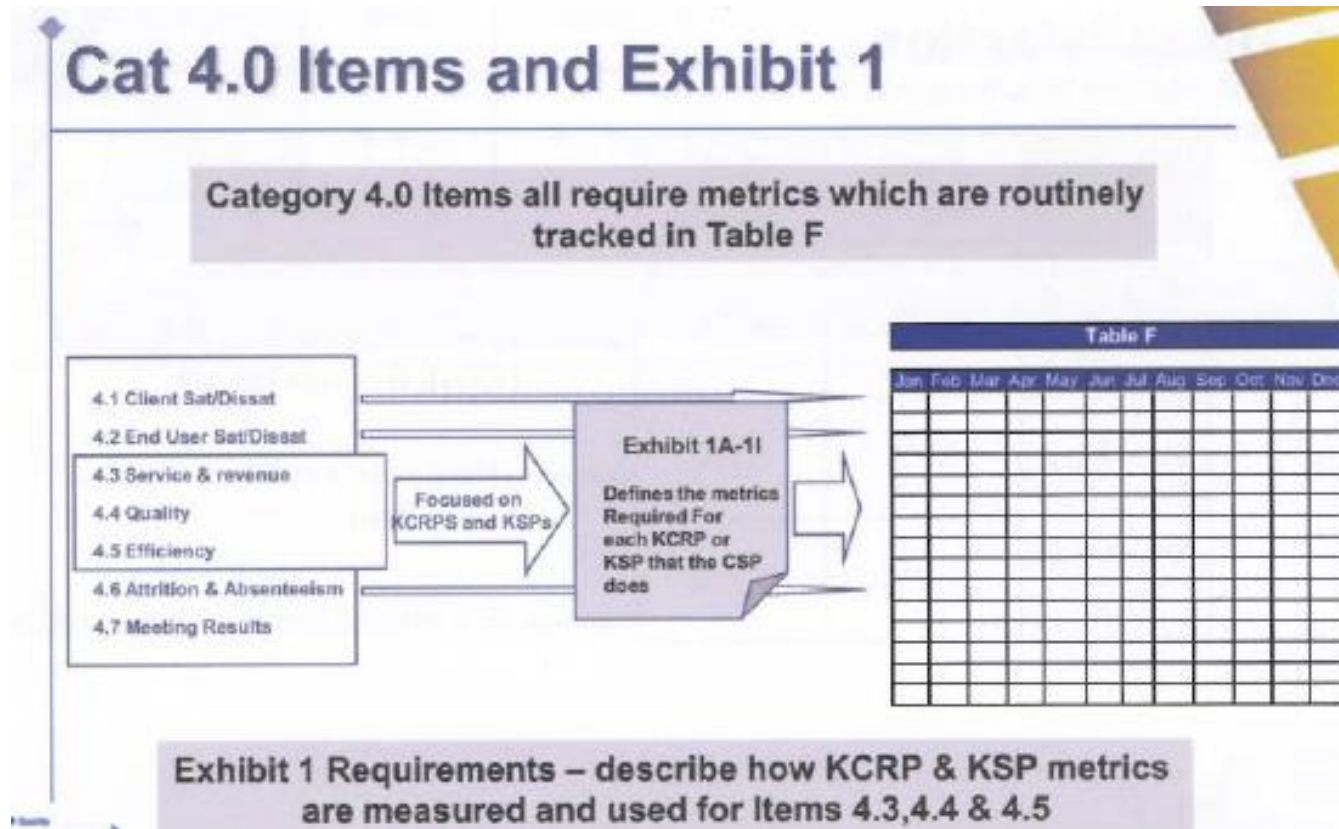
COPC 50/75 rule

- Perfection in all times and all areas is impossible: 50/75 rule



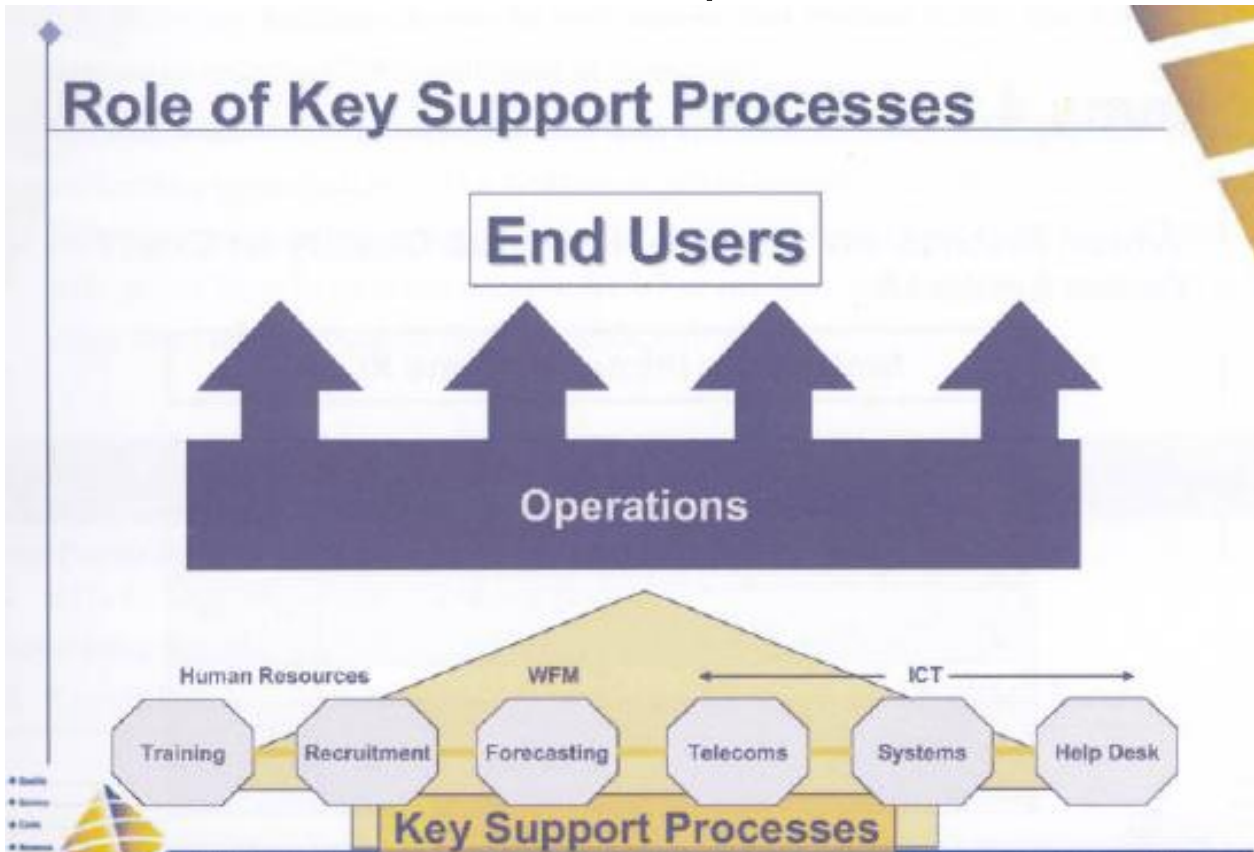
COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & Cost Performance



COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & Cost Performance



COPC Cat 4.0 and Exhibit 1

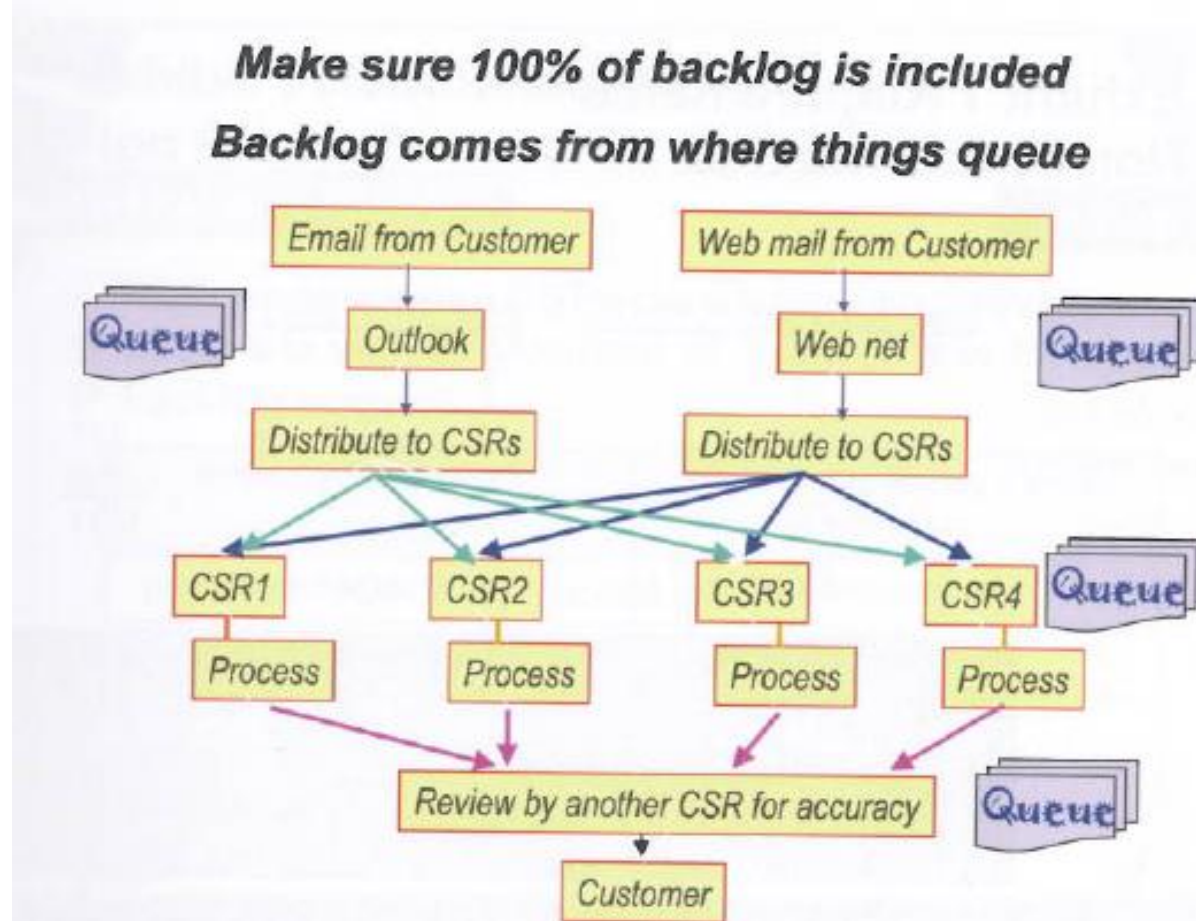
- Which Metrics are Service, Revenue, Quality or Cost for IB CC (Exhibit 1 A)?

1. On-Time (SL or ASA)	Service	Item 4.3
2. Abandon rate	Service	
3. Revenue (if appropriate)	Revenue	
4. Critical Accuracy	Quality	Item 4.4
5. Non-Critical Accuracy	Quality	
6. Contact Resolution (FTR)	Quality	
7. Volume		
8. AHT	Efficiency/Cost	Item 4.5
9. Cost per Transaction	Efficiency/Cost	
10. Agent Utilization/Efficiency	Efficiency/Cost	



COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & Cost Performance

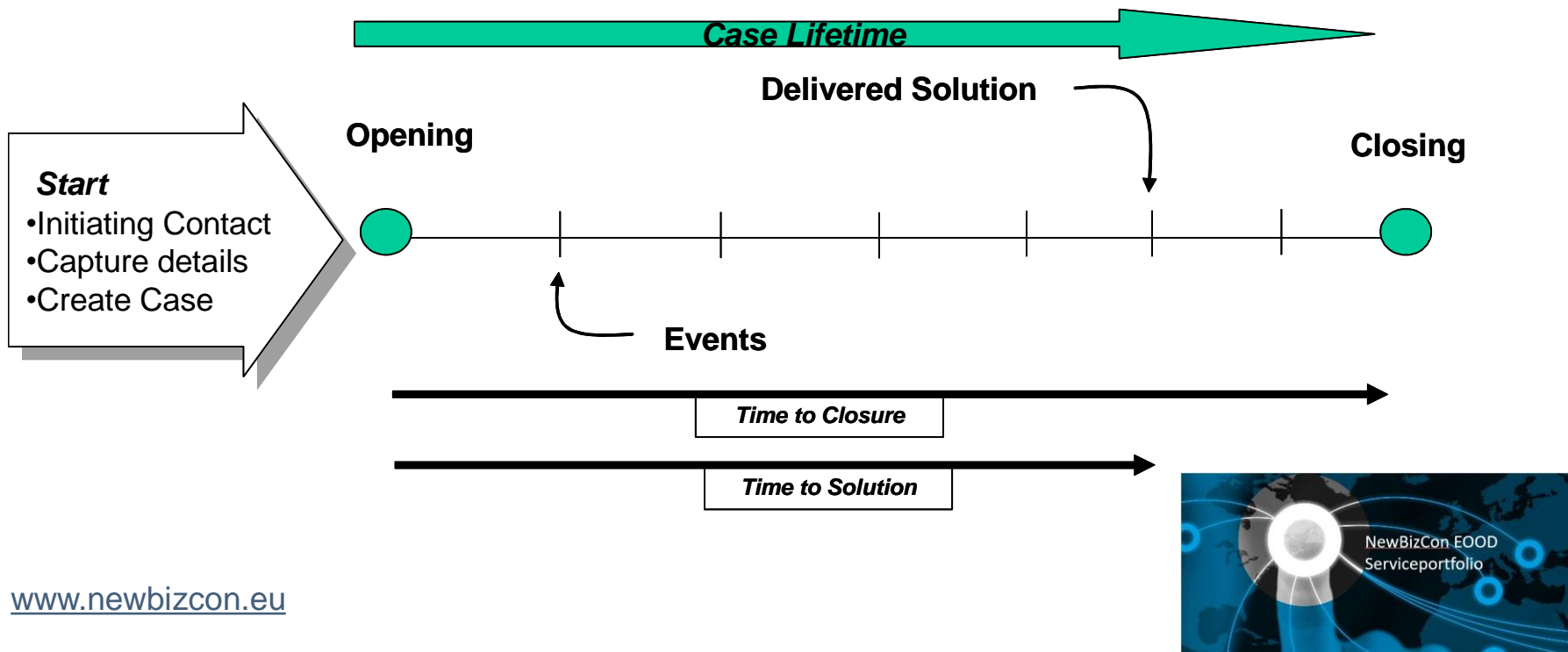


COPC Cat 4.0 and Exhibit 1

- **Service, Revenue, Quality & Cost Performance**

Multiple Events (each can be simple transaction):

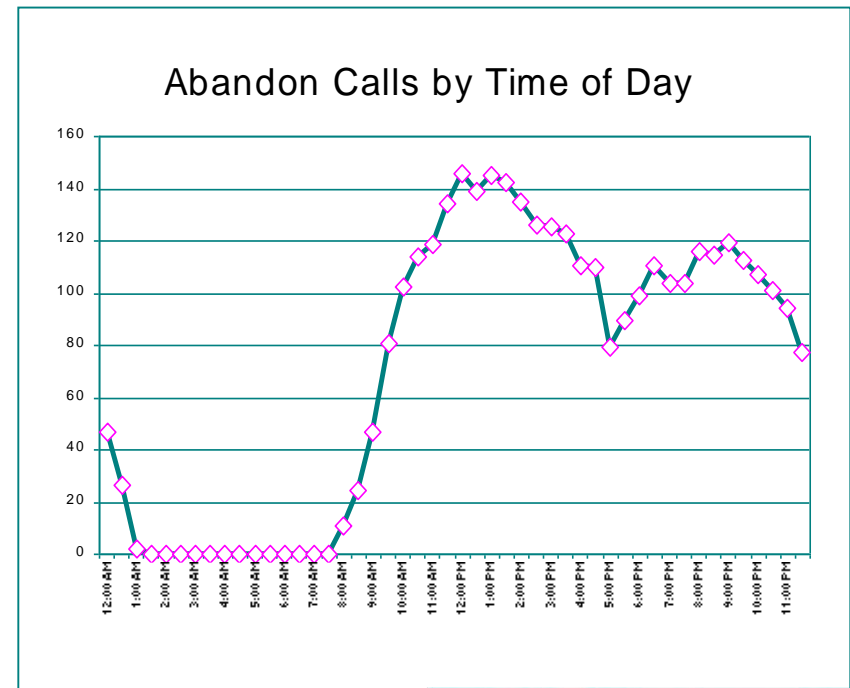
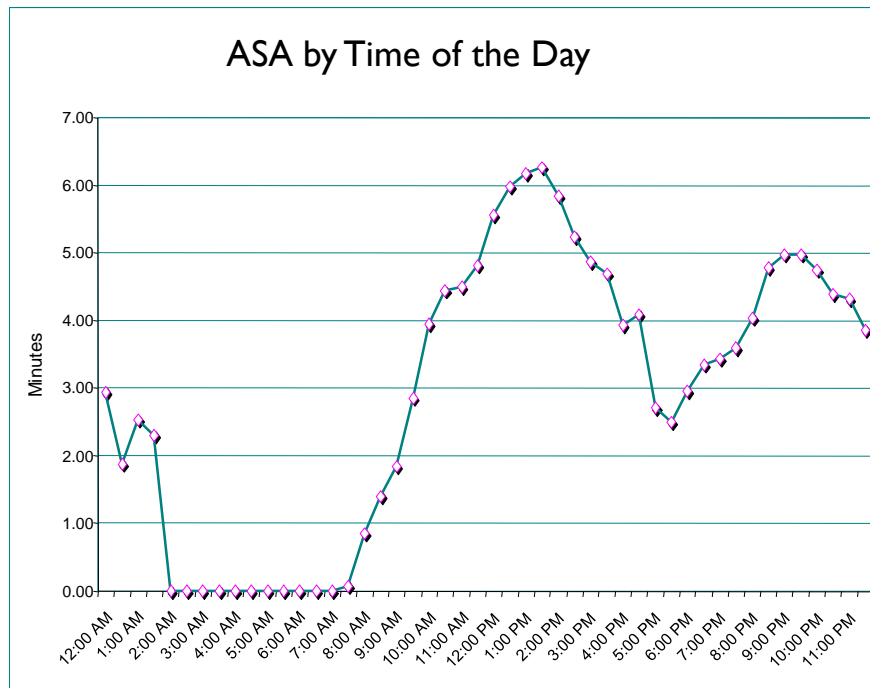
1. Phone/chat/Non Phone contact
2. Outbound (Call Backs)
3. Escalations (transactions which cannot be processed)
4. Involving 3rd parties



COPC Cat 4.0 and Exhibit I

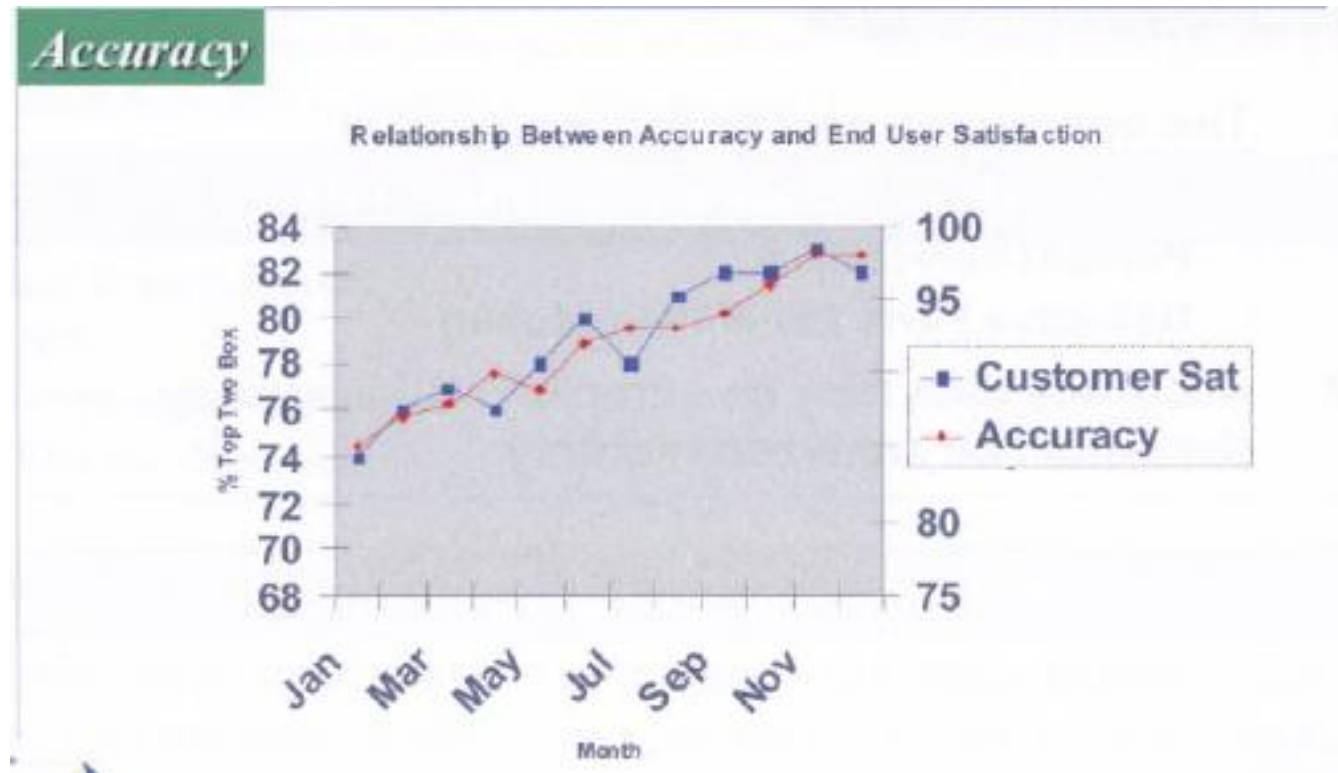
- **Service, Revenue, Quality & Cost Performance**

Abandonment and Speed of Answer should be correlated



COPC Cat 4.0 and Exhibit 1

- Service, Revenue, **Quality** & Cost Performance



COPC Cat 4.0 and Exhibit 1

- Service, Revenue, **Quality** & Cost Performance

Accuracy

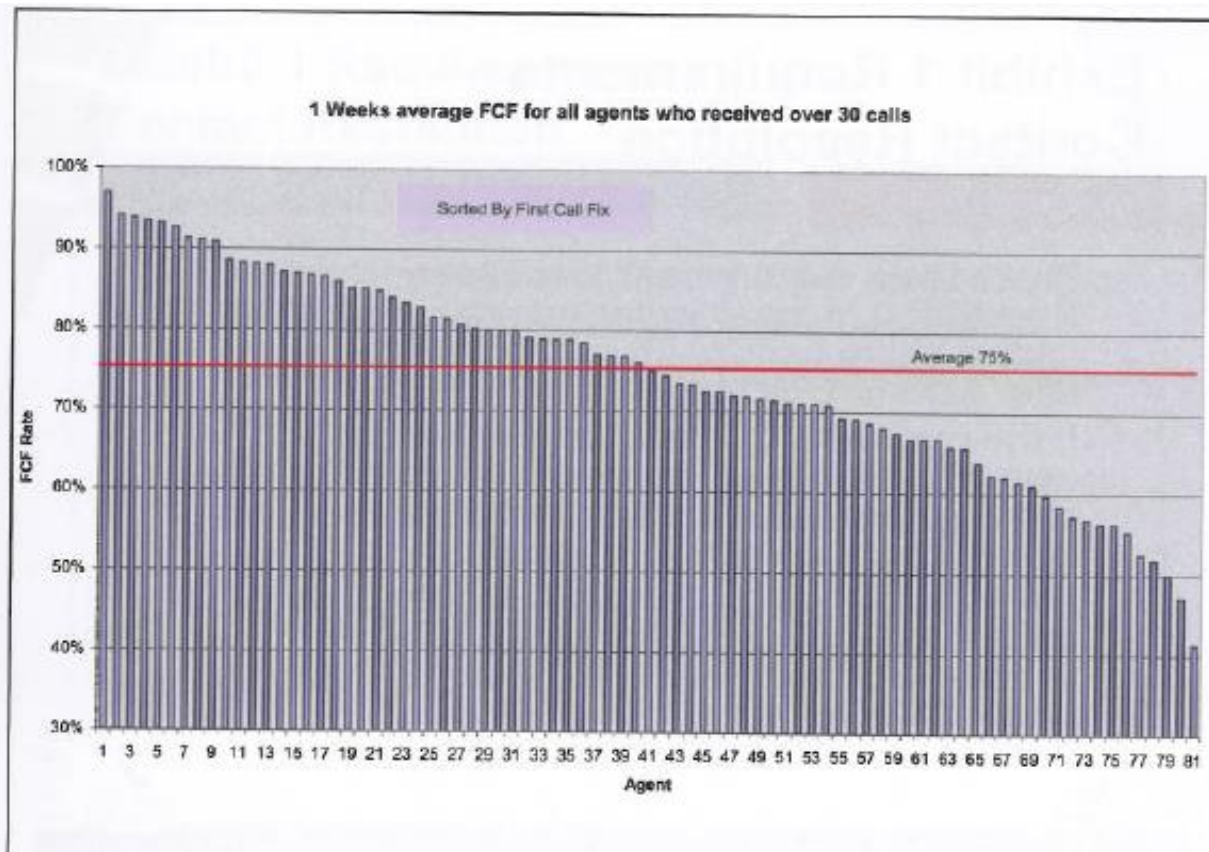
Directory Assistance Recorded Causes of Errors (Jan '02)	Calls Monitored	Errors	Critical	Non-Critical
1 Failure to use appropriate branding	13,008	29		
2 Failure to acknowledge a customer in excess of 10 sec.	13,008	37		
3 Inappropriate behavior or language	13,008	52		
4 Not Found Report where listing exist	13,008	132		
5 Failure to bridge a customer to an automated service	13,008	57		
6 Failure to handoff to an automated system (unless requested)	13,008	17		
7 Provided an incorrect number	13,008	389		
8 Incorrect billing inputs	13,008	30		
9 Incorrect call routing	13,008	4		
10 Failure to report network difficulties	13,008	0		
Errors		747	555	192
Number of calls without errors or number of opportunities			12,453	78,048
Accuracy %			95.7%	99.8%

78,048 = 6 Non Critical Opportunities in each of 13,008 calls

↑ Calculated By Unit ↑ Calculated By Opportunity

COPC Cat 4.0 and Exhibit 1

- Service, Revenue, **Quality** & Cost Performance



COPC Cat 4.0 and Exhibit 1

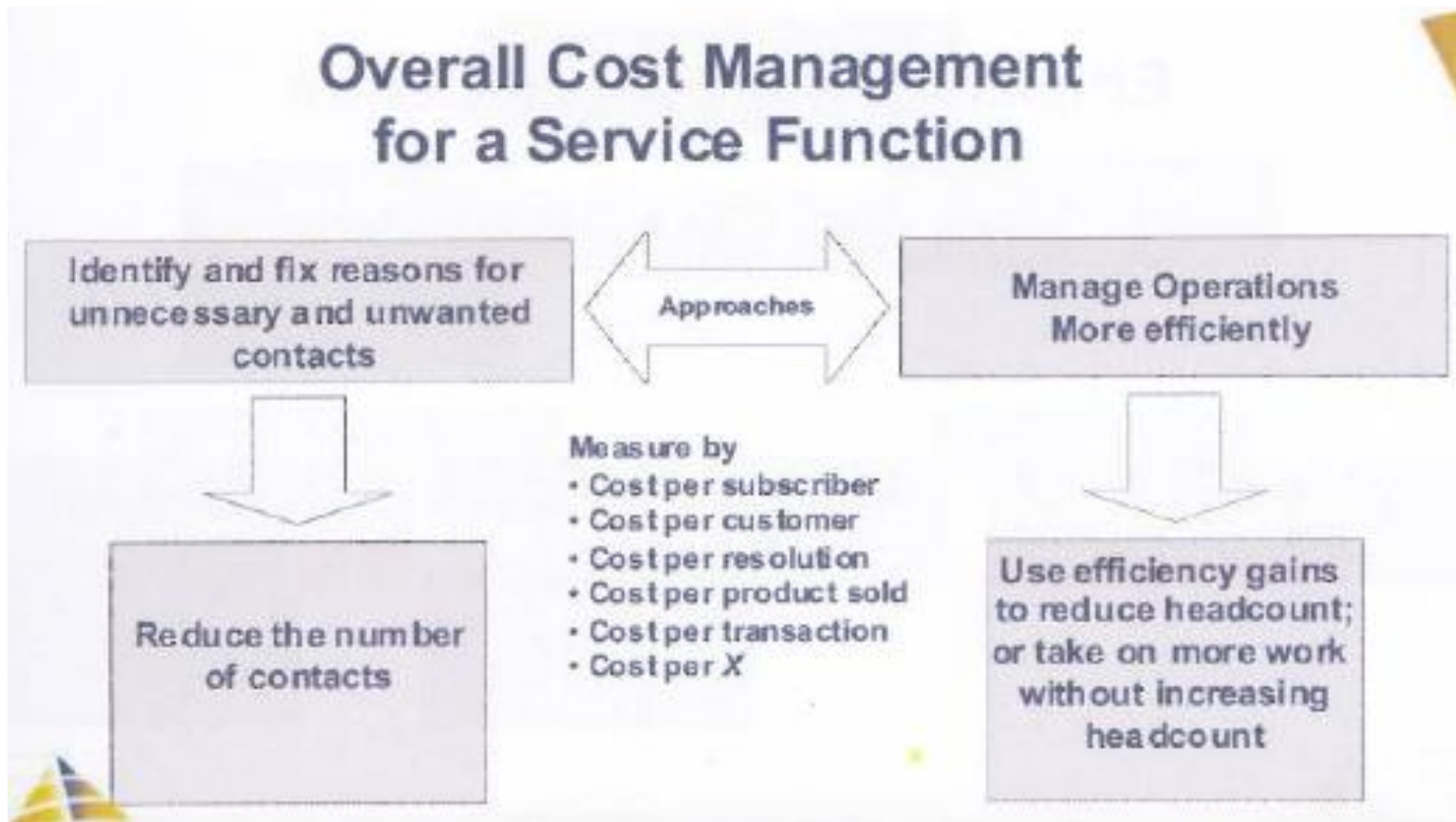
- Service, Revenue, **Quality** & Cost Performance

Cause	Client 1	Client 2	Client 3	Client 4	Client 5	Client 6	Client 7	Client 8	Entity Total	
Procedure / process	1	1	4	0	2	0	6	6	20	25.32%
Other	1	1	0	0	1	1	0	6	12	15.19%
SLA	0	0	3	0	0	0	0	8	11	13.82%
IT/Data/Telephony	2	0	0	0	0	0	0	6	8	10.13%
Staff Complaint	0	1	0	0	0	2	3	2	8	10.13%
pro-activeness	3	0	0	0	0	0	2	1	6	7.59%
Reporting	0	0	2	0	1	0	0	2	5	6.33%
Inv. clng	0	0	2	0	0	0	0	3	5	6.33%
Customer complaint	0	0	0	4	0	0	0	0	4	5.06%
Total	7	3	11	4	4	3	11	36	79	

Example Dissatisfaction Analysis

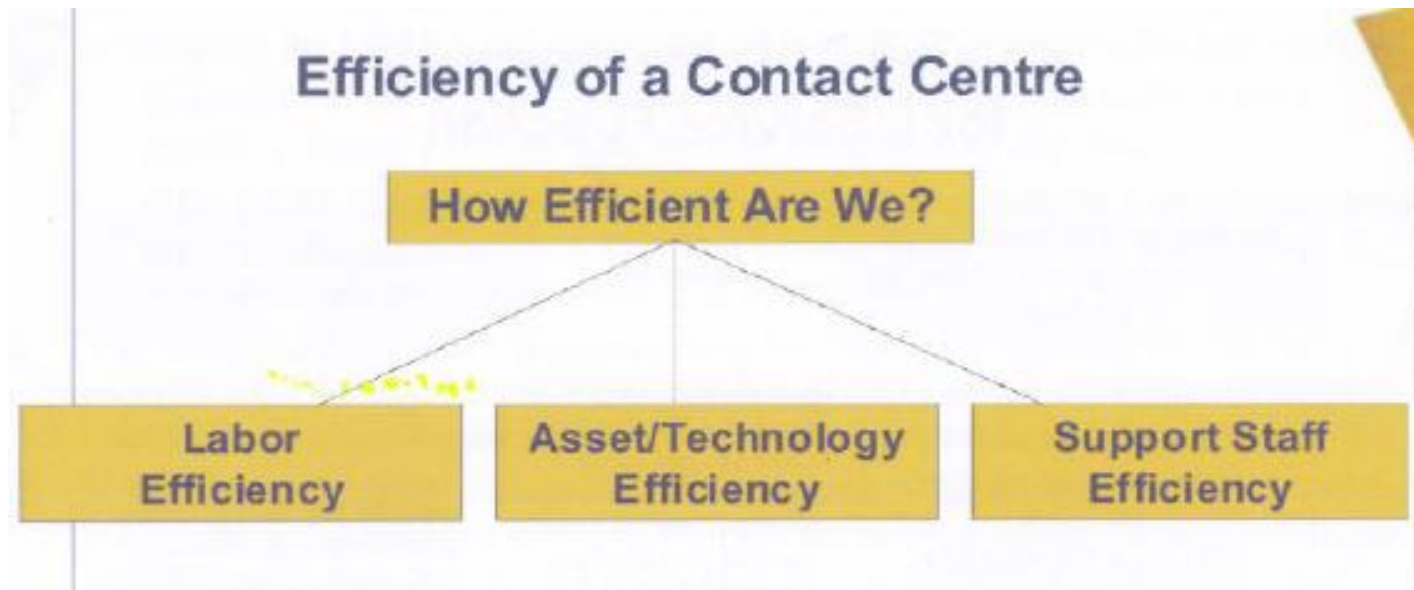
COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & **Cost** Performance



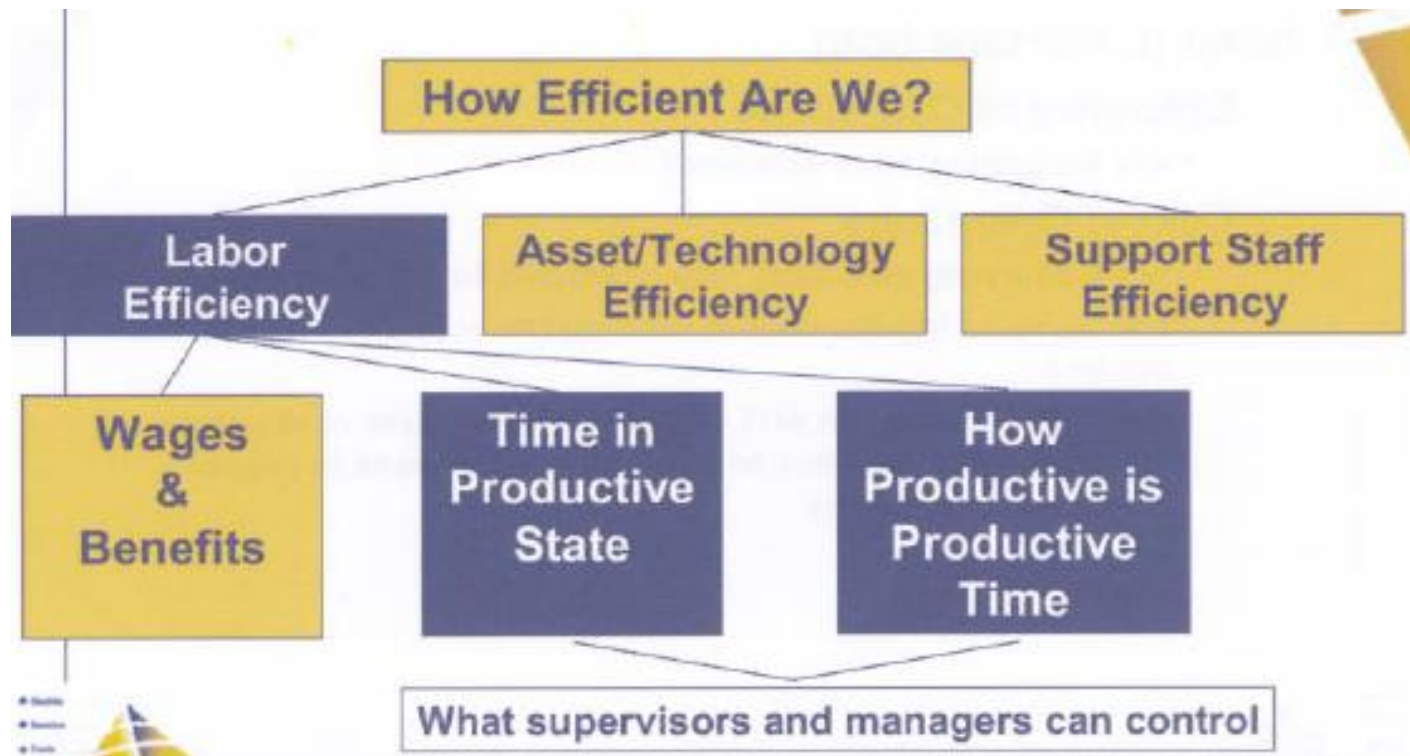
COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & **Cost** Performance



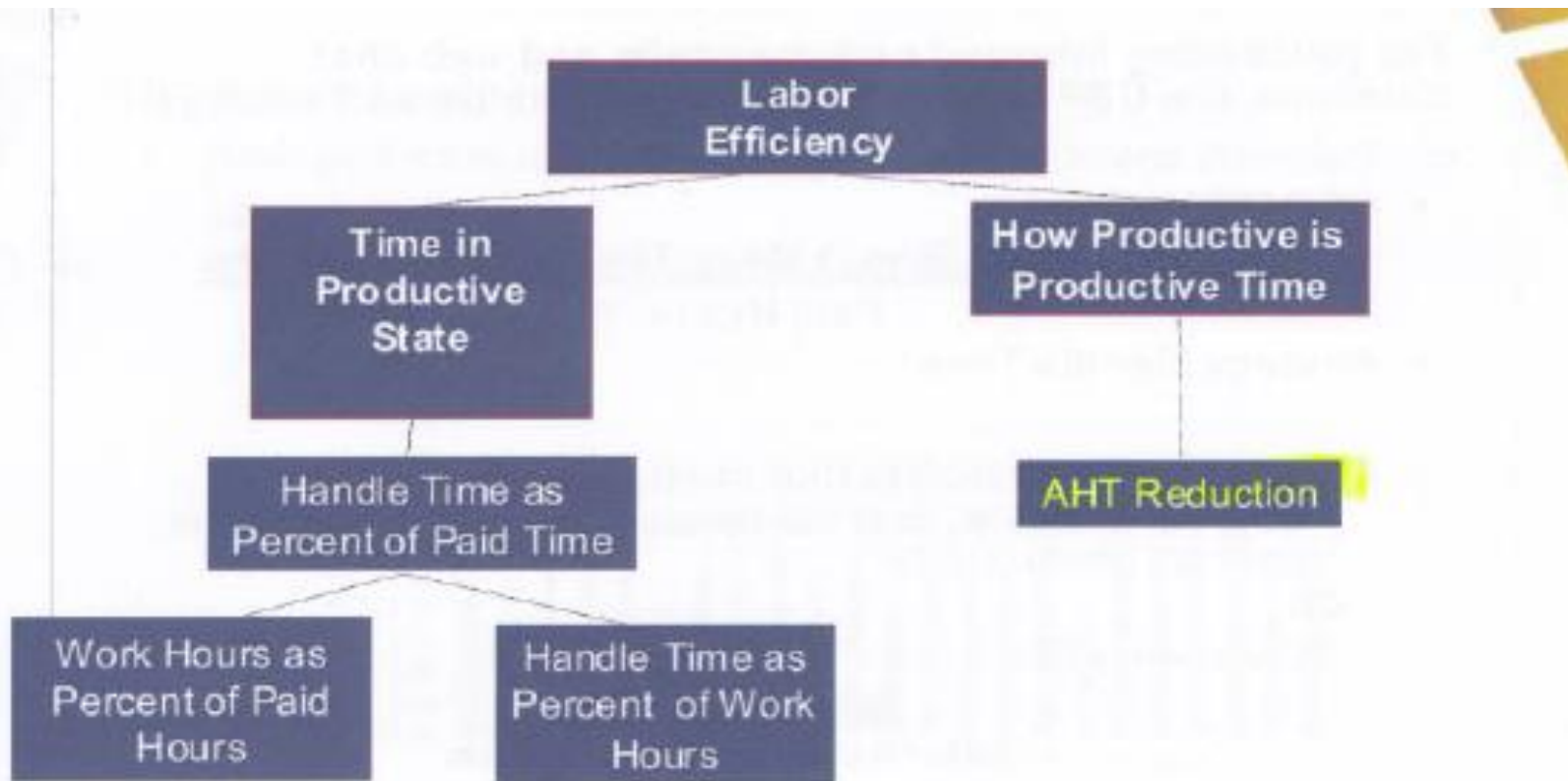
COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & **Cost** Performance



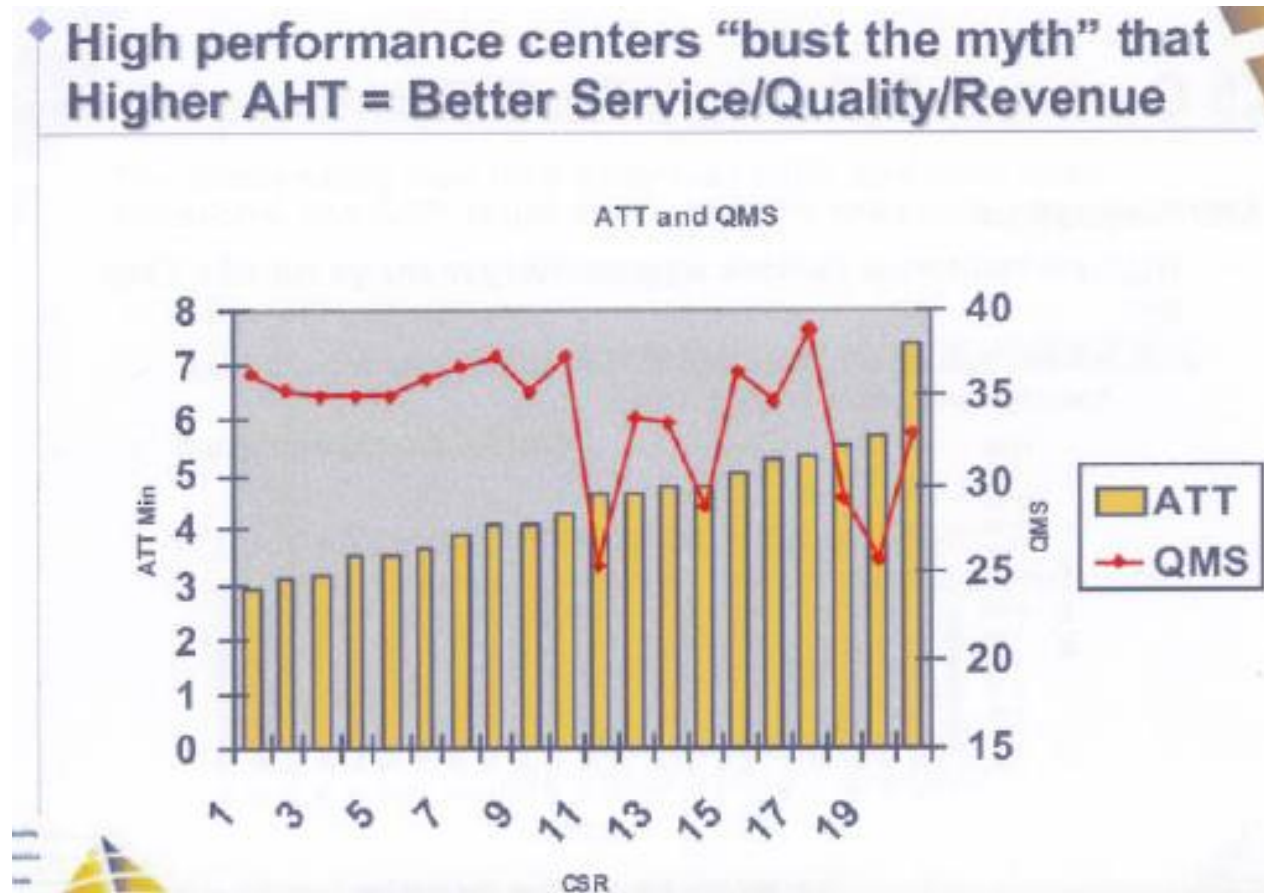
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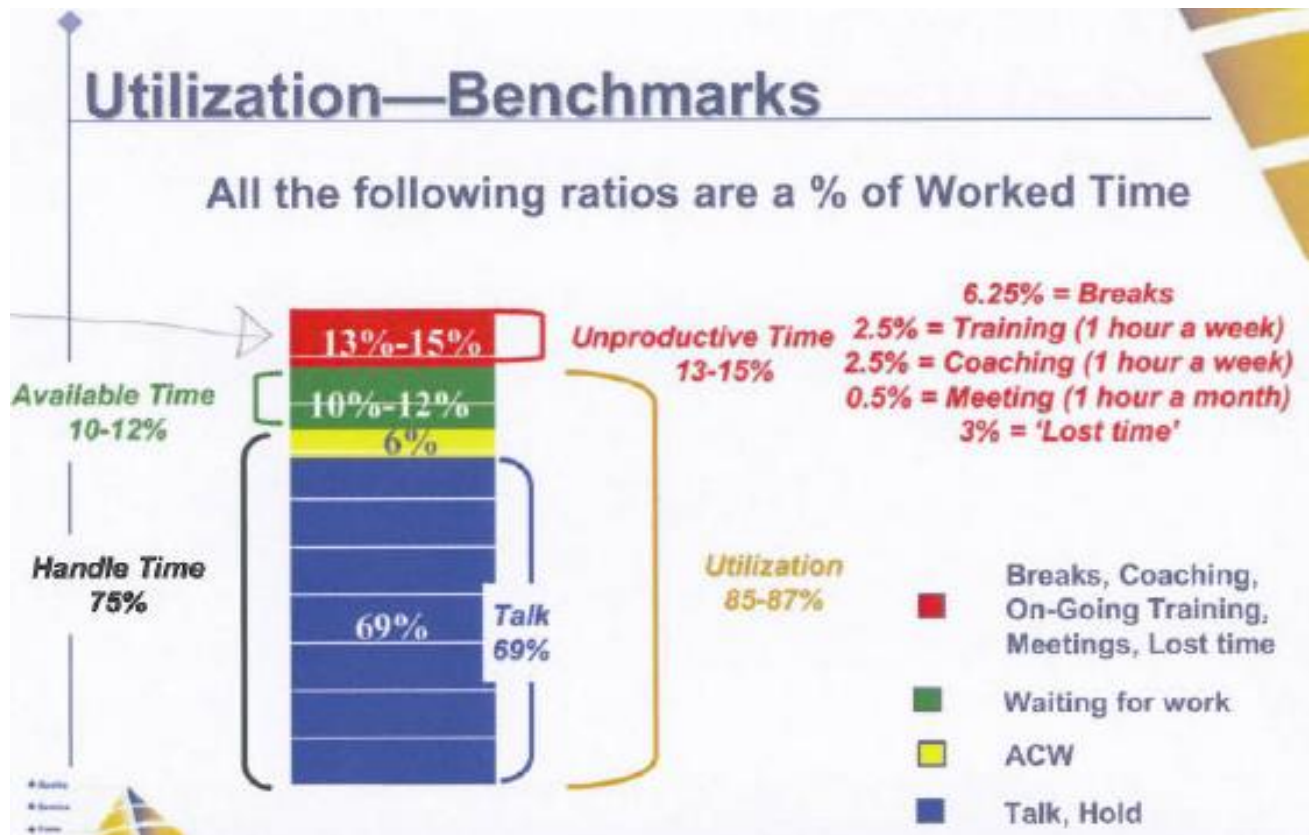
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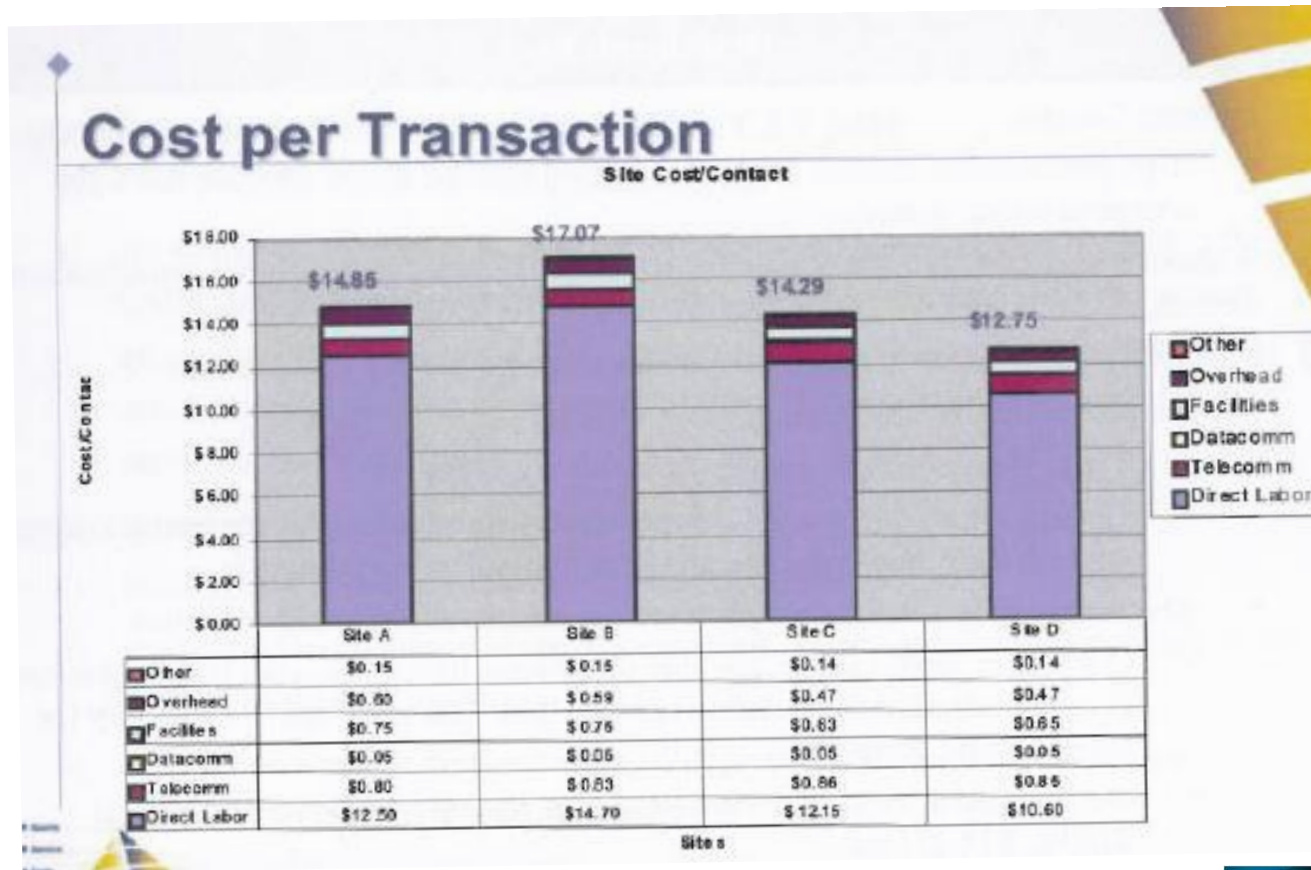
COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & **Cost** Performance



COPC Cat 4.0 and Exhibit 1

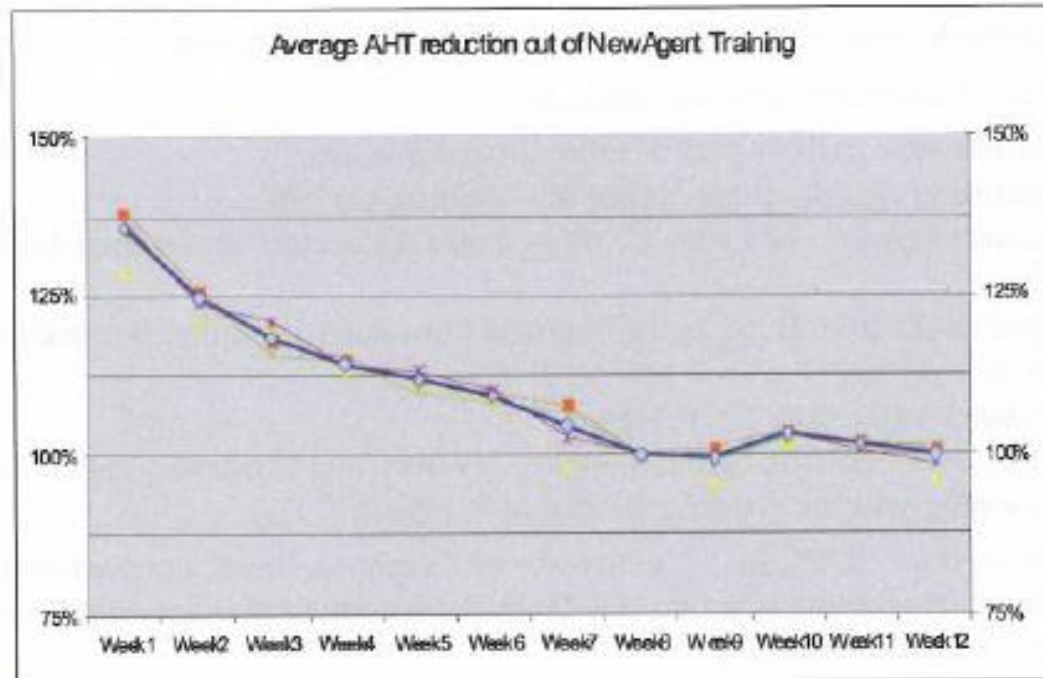
- Service, Revenue, Quality & **Cost Performance**



COPC Cat 4.0 and Exhibit 1

- Service, Revenue, Quality & **Cost** Performance

Quantifying the Learning Curve



2.6 CUIKA: Data vs. Opinion

Managing by Opinion
Vs.
Managing by Data

**Watch for this
Common Pitfall**



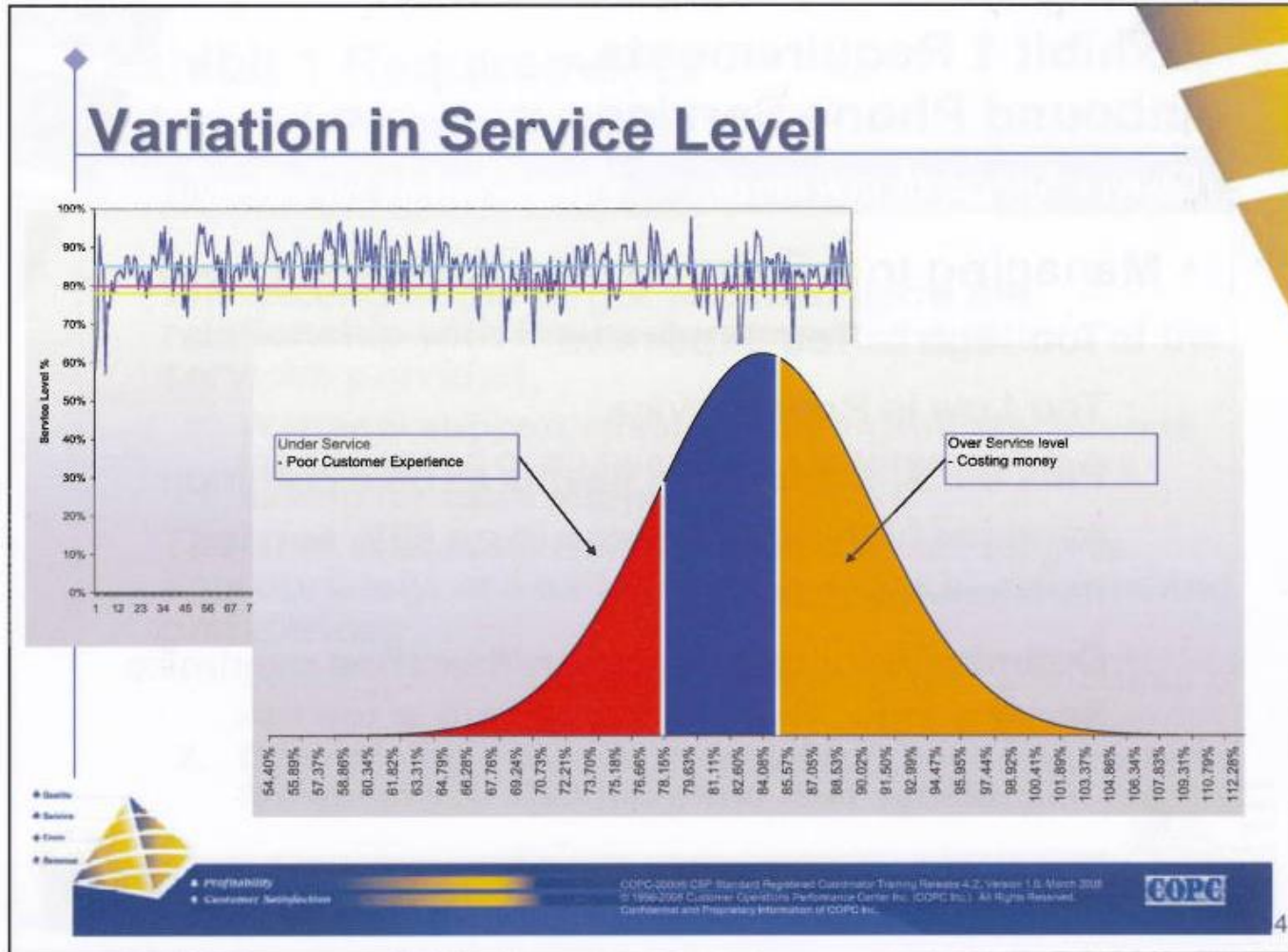
2.6 CUIKA: Average vs. Range

Managing by Average
Vs.
Managing by Range

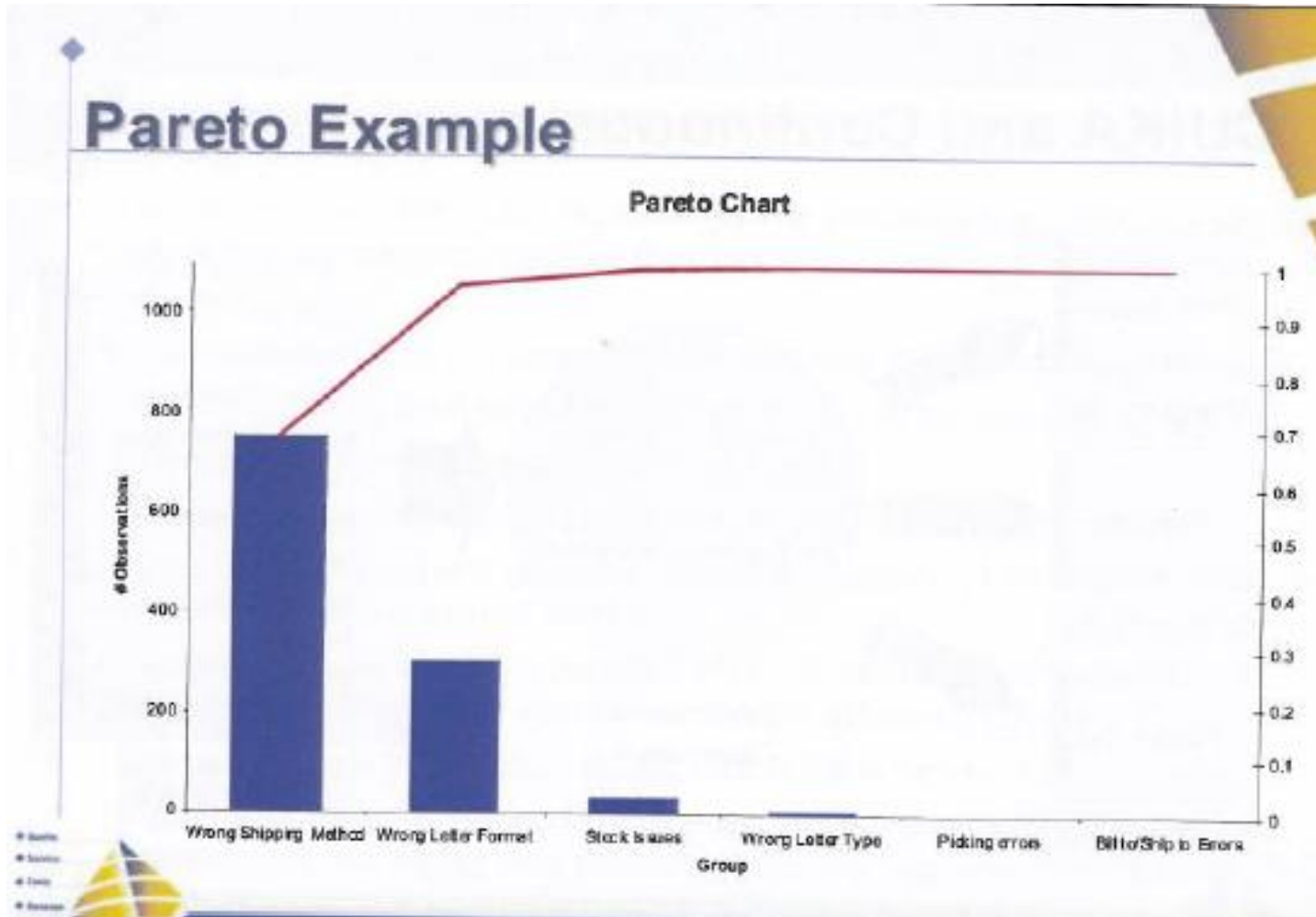
**Watch for this
Common Pitfall**



COPC Cat 4.0 and Exhibit 1



2.3 Corrective action and continuous improvement



2.3 Corrective action and continuous improvement

Pareto Example – Order Processing

Order Analysis

Orders Received	6766	
Orders Checked	6766	
Orders Correct	5668	Error Rate
Orders Incorrect	1098	16.2%

Analysis of Incorrect Orders	1098	
Wrong Shipping Method	752	68.5%
Wrong Letter Format	307	28.0%
Stock Issues	31	2.8%
Wrong Letter Type	8	0.7%
Picking errors	0	0.0%
Bill to/Ship to Errors	0	0.0%

WHY?

What is the Cause?

WHY?

2.3 Corrective action and continuous improvement

Directory Assistance Pareto Analysis

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Accuracy %				95.7%	99.8%

13,008 Calls
 555 Critical Errors 95%
 130 " " 99%

389 Incorrect Number, 132 Not Found where listed
 Final goal

1. Build Error 'Profile'
2. Match Agent/Teams to Profile
3. Set 1st improvement target
4. Implement corrective actions
5. Measure results
6. Recognize & reward achievement
7. ID process improvements
8. Implement corrective actions
9. Measure results
10. Recognize & reward achievement

Possible Causes

Experience
 Attitude
 Work conditions
 Call volume
 Search Tool
 External
 Other

Training & Monitoring scores
 Quality scores, Performance Reviews, Staff Satisfaction
 Time of day, shift, breaks/meals
 Historical analysis
 Ease-of-use, stability, availability
 Customer attitude, language/accents
 ???

- Questions
- Comments
- Further reading - <https://www.copc.com/copc-standards/>

