



INSIDER'S GUIDE TO CONTACT CENTER AND CUSTOMER EXPERIENCE TERMS

Authored by Brad Cleveland ©
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FOREWORD



Jim Lewis
CEO, Brightmetrics

Clarity of communication is critical in the realm of contact center management. The gap between efficient, smooth operation and miscommunication can often hinge on a shared understanding of industry-specific terminology. Recognizing this, we at Brightmetrics have partnered with industry expert, Brad Cleveland, to compile a glossary of essential contact center management terms.

In the ever-changing landscape of contact center management, the value of a common language cannot be overstated. The consistent use of key terms fosters efficient communication, ensures resources are properly allocated, and helps maintain customer satisfaction.

The purpose of this Insider's Guide is straightforward: to enhance understanding, demystify industry jargon, and ensure everyone from newcomers to experienced professionals can communicate clearly and effectively.

Brightmetrics is committed to providing valuable insights and data for contact center management. Our drive to develop resources like this glossary stems from this commitment. More than just providing data, we aim to help interpret it accurately, to improve decision-making and operational efficacy. In this context, the Insider's Guide serves as a valuable tool to help elucidate complex terms, ensuring everyone has a firm grasp on the industry's principles.

Brad Cleveland's partnership has been instrumental in this project. His knowledge and experience bring an authoritative perspective to these terms, enhancing the Guide's value and its ability to inform and educate its users.

In essence, this reference tool is designed to aid in your understanding of contact center management, providing you with a comprehensive vocabulary to effectively navigate this industry. We trust it will not only improve communication among your teams and customers but also facilitate smarter, data-driven decisions.

ACRONYMS AND ABBREVIATIONS



ACD	Automatic Contact Distributor or Automatic Call Distributor	IP	Intellectual Property or Internet Protocol
ACW	After-Call Work or After-Contact Work	IRT	Interactive Response Technology
AHT	Average Handling Time or Average Holding Time on Trunks	IS	Information Systems
AI	Artificial Intelligence	IT	Information Technology
ANI	Automatic Number Identification	IVA	Intelligent Virtual Assistant
ASA	Average Speed of Answer	IVR	Interactive Voice Response
ASR	Automatic Speech Recognition	IXC	Interexchange Carrier
ATA	Average Time to Abandonment	KM	Knowledge Management
ATB	All Trunks Busy	KPI	Key Performance Indicator
ATT	Average Talk Time	LBS	Location-Based Services
AWT	Average Work Time	LEC	Local Exchange Carrier
BPO	Business Process Outsourcing	LWOP	Leave Without Pay
CCaaS	Contact Center as a Service	MAC	Moves, Adds and Changes
CCO	Chief Customer Officer	MIS	Management Information System
CED	Caller-Entered Digits or Customer-Entered Digits	ML	Machine Learning
CEM	Customer Experience Management	MM	Multimedia
CES	Customer Effort Score	NCC	Network Control Center
CIO	Chief Information Officer	NPS	Net Promoter Score
CLE	Customer Life Expectancy	OPA	Off-Phone Activity
CLI	Calling Line Identity	PBX	Private Branch Exchange
CLV	Customer lifetime value	QA	Quality Analysis or Quality Assurance
CMS	Call Management System or Contact Management System	QM	Quality Management or Quality Monitoring
COI	Cost of Inaction	QMS	Quality Management System
CRM	Customer relationship management	QOS	Quality of Service
CSAT	Customer Satisfaction or Customer Satisfaction Score	RAN	Recorded Announcement
CTI	Computer Telephony Integration	RNA	Ring No Answer
CX	Customer Experience	ROI	Return on Investment
CXO	Chief Experience Officer	RONA	Roll Over No Answer
DID	Direct Inward Dialing	RPA	Robotic Process Automation
DNIS	Dialed Number Identification Service	RSF	Rostered Staff Factor
DTMF	Dual-Tone Multifrequency	SaaS	Software as a Service
ERP	Enterprise Resource Planning	SBR	Skills-Based Routing
EWT	Expected Wait Time	SIP	Session Initiation Protocol
EX	Employee Experience	SL	Service Level
FCR	First Call Resolution or First Contact Resolution	SLA	Service Level Agreement
FTE	Full-Time Equivalent	SMS	Short Messaging Service
HR	Human Resources	TTS	Text-to-Speech
IBC	In-Between Contacts	UX	User Experience
IM	Instant Messaging	VOC	Voice of the Customer
IoT	Internet of Things	VoE	Voice of the Employee
		VoIP	Voice over Internet Protocol
		VR	Virtual Reality
		VRU	Voice Response Unit
		WFMS	Workforce Management System
		WFO	Workforce Optimization

GLOSSARY



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24x7. Refers to operations that are always open for business (24 hours a day, seven days a week).

5G. Fifth-generation wireless, designed to increase the speed and capabilities of prior wireless networks.

800 Number. Also known as “1-800 number.” Toll-free numbers that begin 800, 888, 877, 866, 855 or 844. The business, rather than the customer, pays for charges.

Abandoned Contact. Also called an abandoned call or lost call. The customer hangs up or gives up on an interaction before reaching an agent. Related terms: Customer Tolerance, Service Level.

Abandoned Rate. The percent of contacts that abandon. The inverse is the percent of contacts answered. See Abandoned Contact.

Adherence to Schedule. A general term that refers to how well agents adhere to their schedules. The two terms most often associated with adherence include availability (the amount of time agents were available) and compliance (when they were available).

After-Call Work (ACW). Also called after-contact work, wrap-up, post-call processing, average work time or not ready. Work that is necessitated by and immediately follows a contact. Related terms: Average Handling Time, Talk Time.

Agent. The person who handles customer interactions. Also referred to as customer service representative (CSR), customer care representative, telephone sales or service representative (TSR), rep, associate, consultant, engineer, and other variations.

Agent Available Percentage. See Available State, Available Time.

Agent Features. Features on a system that are designed for agent use.

Agent Group. Also called split, gate, queue, answer group, or skills group. An agent group shares a common set of skills and knowledge, handles a specified mix of contact types (e.g., service, sales, billing, technical support) and can comprise hundreds

of agents across multiple sites. Supervisory groups and teams are often subsets of agent groups.

Agent Performance Report. An ACD report that provides statistics for individual agents (e.g., on average handling time or unavailable time).

Agent Status. The mode an agent is in (e.g., talk time, after-call work, unavailable, etc.). See Work State.

All Trunks Busy (ATB). When all trunks are busy in a specified trunk group. Related terms: Erlang B, Trunk, Trunk Load.

Analytics. Broadly refers to data analysis and reporting tools that enable the organization to analyze disparate data to uncover correlations and better understand customer trends and business activities. Related terms: Speech Analytics, Text Analytics.

Announcement. A recorded verbal message played to customers. See Delay Announcement.

Answered Call. When referring to an agent group, a call is counted as answered when it reaches an agent. Related terms: Handled Call, Offered Call, Received Call.

Answer Group. See Agent Group.

Application Service Provider (ASP). An outsourcing business that enables other organizations to access and use technologies or services for a fee.

Application-Based Routing and Reporting. An ACD capability that enables the system to route and track transactions by type of contact, or application (e.g., sales, service, etc.) versus the traditional method of routing and tracking by trunk group and agent group.

Architecture. The basic design of a system. Determines how the components work together, system capacity, ability to upgrade and ability to integrate with other systems.

Artificial Intelligence (AI). Refers to computer systems simulating human intelligences, i.e., in decision-making, speech recognition and translation, and others. See Generative AI.

Asynchronous Messaging. Messages that do not require an immediate response are put in queue for later handling.

Attendant. A person who works at a company switchboard, often called a receptionist or operator. See Agent.

Attrition (Employees). See Turnover.

Attrition Rate (Customers). Also referred to as churn; the percentage of customers lost in a given period of time.

Augmented Reality. See Virtual Reality.

Authentication. Verifying the identity of a customer, user, or process.

Auto Wrap-Up. An ACD feature whereby the ACD is programmed to automatically put agents into after-call work after they finish talk time and disconnect calls. When they have completed any after-call work required, they put themselves back into available. See Auto- Available.

Auto-Available. An ACD feature whereby the ACD is programmed to automatically put agents into available status after they finish talk time and disconnect calls. If they need to go into after-call work, they manually put themselves there. Related terms: Auto Wrap-Up, Manual Available.

Automated Greeting. An agent's pre-recorded greeting that plays automatically when a call arrives at his or her telephone station.

Automated Reply. A system-generated reply that is automatically sent to a customer, acknowledging that his or her message was received and informing the customer of when to expect a response from an agent. See Response Time.

Automatic Call Distributor (ACD). May also be referred to as automatic contact distributor. The specialized system used to route, manage and report on customer contacts. Basic ACD capabilities include route contacts; sequence contacts; encourage customers

to wait (by playing delay announcements and, in some cases, predicting and announcing wait times); distribute contacts among agents; capture planning and performance data, both real-time and historical; and integrate with other systems.

Automatic Call Sequencer (ACS). A simple system that is less sophisticated than an ACD, but provides some ACD-like functionality. See Automatic Call Distributor.

Automatic Number Identification (ANI). A telephone network feature that passes the number of the phone the caller is using to the contact center in real-time. Related terms: Computer Telephony Integration, Dialed Number Identification Service.

Automatic Speech Recognition (ASR). An IVR capability that enables customers to interact with computers using spoken language.

Auxiliary Work State. An agent work state that is typically not associated with handling contacts (e.g., meeting with supervisor). When agents are in an auxiliary mode, they will not receive contacts.

Available State. The work state of agents who are signed in to the ACD and waiting for contacts to arrive. See Occupancy.

Available Time. The total time that an agent or agent group waits for contacts to arrive, for a given time period.

Avatar. An agent's or customer's visual representation of themselves, e.g., a photo or icon.

Average Call Duration. See Average Handling Time.

Average Call Value. Also average contact value. A measure common in revenue-producing contact centers. It is total revenue divided by total number of contacts for a given period of time.

Average Concurrent Chat Sessions. The average number of simultaneous chat sessions each agent handles. For related terms, see Chat.

Average Delay. See Average Speed of Answer.

Average Handling Time (AHT). For calls, AHT is the sum of average talk time plus average after-call work. For contacts without talk time (e.g., email), AHT is average time agents spend handling the interactions plus the average time they spend on any work that follows contacts. Related terms: Talk Time, After-Call Work.

Average Holding Time on Trunks (AHT). The average time inbound interactions occupy the trunks.

Average Number of Agents. The average number of agents logged in to an ACD group for a specified time period.

Average Speed of Answer (ASA). Also called average delay. A measure that reflects the average delay of all calls, including those that receive an immediate answer.

Average Time to Abandonment (ATA). Also called average delay to abandon. The average time that customers wait in queue before abandoning. Related term: Customer Tolerance.

Average Work Time (AWT). See After-Call Work.

Availability. The time agents spend handling contacts or waiting for contacts to arrive. See Adherence to Schedule.

Back Office. Business applications and functions that are “behind the scenes” to a customer, e.g., accounting, finance, inventory control, fulfillment, productions and human resources. See Front Office.

Balanced Scorecard. An approach to metrics and management that aims to give managers a “balanced” view of performance by establishing key performance indicators (KPIs) in different categories. Common categories include customer, employee, financial, and process or organizational maturity.

Bandwidth Calculator. Software tools used for calculating the bandwidth capacity required for SIP trunks. See Trunks.

Base Staff. Also called seated agents. The minimum number of agents required to achieve service level and

response time objectives for a given period of time. Related term: Rostered Staff Factor.

Beep Tone. An audible notification that a call has arrived. Beep tone can also refer to the audible notification that a call is being monitored. Also called zip tone. Related terms: Automated Greeting, Call Forcing.

Best Practice. Practices or procedures that have been proven across a large number of organizations or situations to be correct or most effective.

Big Data. Large sets of data that can be analyzed using software tools to identify trends, associations, or insight on specific issues or variables. See Analytics.

Blended Agent. An agent who 1) handles both inbound and outbound contacts, and/or 2) handles contacts from various channels (e.g., phone, chat, social media). See Call Blending.

Blocked Call. A call that cannot be connected immediately because 1) no circuit is available at the time the call arrives, or 2) the ACD is programmed to block calls from entering the queue when the queue backs up beyond a defined threshold. See Controlled Buses.

Bottom-Up Forecasting. A forecasting methodology that begins with intervals, then works up to larger spans of time—e.g., intervals add up to days, then weeks, then months.

Brand Advocate. See Customer Advocacy.

Brick and Mortar. The physical facilities in which an organization does business (versus online).

Business Continuity Plan. Also called Disaster Recovery Plan. A plan, developed as part of business continuity management, that enables the organization to avoid or recover expediently from an interruption in operations.

Business Process Outsourcing (BPO). Outsourcing business functions or responsibilities to another company. A business process outsourcer (BPO) is the company providing these services.

Business Rules. A phrase used to refer to various software (or manual) controls that manage contact routing, handling and follow-up. At a basic level, business rules are a sequence of “if-then” statements. More advanced business rules can harness AI technologies. Often used interchangeably with workflow.

Business-to-Business (B2B). Business or interactions between businesses. See Business-to-Consumer.

Business-to-Consumer (B2C). Business or interactions between a business and consumers. See Business-to-Business.

Busy Hour. A resource engineering term, referring to the hour of time resources (i.e., trunks) carry the most traffic during the day, month, or season.

Busy Season. The busiest time of a year for a contact center.

Busy. In use, or “off hook.”

C-level. Refers to top-level leadership roles: chief executive officer (CEO), chief financial officer (CFO), chief operating officer (COO), and others. Where the role is established, the chief customer officer (CCO) oversees customer experience management.

Calibration. In a contact center, calibration is the process in which variations in the way performance criteria are interpreted from person to person are minimized. See Monitoring.

Call. Also called contact, interaction or transaction. Although call most often refers to a telephone call, it can also refer to a video call, or other types of customer contacts. See Contact.

Call Avoidance. Also called contact avoidance. Techniques used to eliminate or divert contacts away from a contact center or support center, e.g., by improving products or services to prevent service issues, improving self-service systems, and others.

Call Blending. Also referred to as contact blending. Traditionally, refers to the ability to dynamically

allocate contact center agents to both inbound and outbound contacts based on real-time needs. More recently, call blending often refers to blending customer contacts with non-phone work or handling contacts from various channels (e.g., email, text, chat, social, or others). See Blended Agent.

Call Center. See Contact Center.

Call Control. The process whereby the agent efficiently guides a contact from beginning to end—identifying the customer’s needs and requirements, providing the best solution, etc.

Call Count. The number of calls handled or being reported in a given timeframe.

Call Duration. See Average Handling Time.

Call Forcing. An ACD feature that automatically delivers calls to agents who are available and ready to take calls. They hear a notification that the call has arrived (e.g., a beep tone) just before the call is delivered to them. See Manual Answer.

Call Load. Call load is volume of contacts multiplied by average handling time of them, for a given period of time. See Workload.

Call Selection. A capability of routing to select the best contact for an agent.

Callback Messaging. See Virtual Hold.

Caller-Entered Digits (CED). Also referred to as customer-entered digits or prompted digits. The digits a customer enters on his or her phone keypad. Usually used for auto attendant, voice response and CTI applications.

CallerID. The telephone number of the person who placed a call.

Career Path. Career paths guide individual employee development through structured advancement opportunities within the contact center and/or organization. See Skill Path.

Carrier. A company that provides telecommunications circuits. Carriers include both local telephone companies, also called local exchange carriers (LECs), and long-distance providers, also called interexchange carriers (IXCs).

Carryover Forecasting. Forecasting for contacts that carry over from one interval to the next, such as calls that begin before midnight and do not conclude until after midnight (carry over into the next day) or contacts that begin in one interval and carry over into the next.

Case Management System. A system typically used in a technical support center that tracks contacts, incidents, service requests, and customers.

Cause-and-Effect Diagram. A chart that illustrates the relationships between causes and a specific effect you want to study.

Central Office (CO). Can refer to either a telephone company switching center or the type of telephone switch used in a telephone company switching center.

Change Management. Refers to guiding the organization through complex change; generally refers to the people aspect of change. (In technology settings, change management can refer to rolling out new versions of software.)

Channel Hopping. Also referred to as channel switching. When customers switch to a different access method, e.g., they send a message through social media instead of continuing to wait on hold after placing a call. The term can also refer to customers who use the same channel but try different routing methods (e.g., they dial alternative phone numbers or try different selections in an IVR menu). Related term: Simultaneous Contacts.

Chat. Enables customers to have real-time, text-based conversations with agents. Related terms: Close-out, Customer Response Time, Exchange, Exchange Response Time, Session, Session Handle Time, Session Response Time, Session Transaction Time.

ChatGPT. See Generative AI.

Chatbot. A chat robot that can converse with a human user through text or voice commands. Related term: Intelligent Virtual Assistant (IVA).

Chief Customer Officer (CCO). Also referred to as Chief Experience Officer (CXO). The senior executive who oversees all customer-related activities across an organization.

Chief Experience Officer (CXO). See Chief Customer Officer.

Chief Information Officer (CIO). A typical title for the highest-ranking executive responsible for an organization's information systems.

Circuit. A transmission path between two points in a network.

Clean Desk Policy. A policy that does not allow cell phones, writing utensils, paper, etc. at an agent workstation, with the purpose of reducing the risk of information theft, fraud, or a security breach.

Close-out. In chat, the moment in time when the session is considered to be complete. See Chat for related terms.

Cloud-Based Services. Software or services delivered "on-demand" through shared services, over a network. For contact centers, many features once available only in premise-based systems can now be delivered through the cloud. Related term: Contact Center as a Service (CCaaS).

Co-Browsing. A term that refers to the capability of both an agent and a customer to see web pages simultaneously and share navigation and data entry.

Coaching Model. A structured approach to providing ongoing feedback to individuals on their performance, which helps set the expectations of agents, coaches, and managers and holds coaches accountable.

Collaboration Tools. Broadly refers to technology capabilities that enable a group of users to easily communicate and share information.

Collateral Duties. Non-phone tasks (e.g., data entry) that are flexible and can be scheduled for periods when call load goes down. Related term: Schedule.

Completed Call. A general term that refers to an inbound contact that successfully reaches and is handled by an agent. Can also refer to an outbound call that successfully reaches a live person (or answering machine, if leaving a message is acceptable). In an outbound context, also called a connected call.

Compliance. Can refer to 1) Adherence to rules, regulations, or laws, or 2) how well agents adhere to schedules. See Adherence to Schedule.

Computer Simulation. A computer-based simulator program that predicts the outcome of various events in the future, given many variables.

Computer Telephony Integration (CTI). The software, hardware and programming necessary to integrate computer systems and telephone systems so they can work together seamlessly and intelligently.

Computer-Based Training (CBT). Also referred to as elearning. Training programs delivered through software applications without the need for a facilitator. See Technology-Based Training.

Concentrated Shift. A scheduling technique that requires agents to work more hours in a day, but fewer days in a week. “Four-by-10” shifts (four days on for 10 hours each, with three days off) are particularly popular with many agents.

Conditional Routing. The system capability to route contacts based on real-time criteria (e.g., contacts in queue, time of day and type of contact).

Contact. In contact centers, contacts refer to the interactions with customers and can include phone, chat, email, text, social media, video, or other types of interactions. See Call.

Contact Center as a Service (CCaaS). A cloud-based solution that provides contact center system capabilities through the cloud (rather than through

premise-based systems). See Cloud-Based Services.

Contact Center Management. Also referred to as call center management. According to the International Customer Management Institute (ICMI), contact center management is “the art of having the right number of properly skilled people and supporting resources in place at the right times to handle an accurately forecasted workload, at service level and with quality.” See Contact Center.

Contact Center-Initiated Assistance. Typically, this refers to a chat session initiated by an agent, rather than the customer.

Contact Center. ICMI defines contact center as “a coordinated system of people, processes, technologies and strategies that provides access to information, resources, and expertise, through appropriate channels of communication, enabling interactions that create value for the customer and organization.” Contact center is an umbrella term that generally refers to a cross-trained groups of agents handling customer service, sales, technical support or other types of customer interactions. See Contact Center Management.

Contact History. The history of a customer’s interactions with an organization, generally recorded and stored in a customer information system.

Contact Management System (CMS). Also referred to as call management system. Another term for an ACD reporting system.

Contact Quality. Also referred to as call quality. Measure that assigns a value to the quality of individual contacts. Related terms: Calibration, Monitoring.

Contact-by-Contact Routing. The process of routing each contact to the optimum destination according to real-time conditions.

Contacts Handled. Also referred to as calls per agent. The number of contacts an agent handles in a given period of time. Related terms: Occupancy, Queue Dynamics.

Contacts in Queue. Also known as calls in queue. A real-time report that refers to the number of contacts received by the ACD but that have not yet connected to an agent. See Service Level.

Contacts Per Hour. An outbound term that refers to the number of contacts divided by agent hours on the dialer.

Control Chart. A quality tool that provides information on variation in a process.

Controlled Buses. The capability of the ACD to generate busy signals when the queue backs up beyond a programmable threshold. See Blocked Call.

Conventional Shift. A traditional five-day-a-week shift during “normal business hours” (e.g., 9 a.m. to 5 p.m., Monday through Friday).

Conversation. Can refer generally to 1) the organization’s engagement with communities and customers through social media (e.g., “join the conversation”—listen to what’s being discussed in social networks and respond when and as appropriate), or 2) a specific interaction with a customer, e.g., having a conversation through phone, chat or other channels.

Core Values. Principles that define what an organization values and that guide how an organization does business.

Cost Center. An accounting term that refers to a department or function in the organization that does not generate profit. When a contact center is viewed as a cost center, the focus is on handling contacts with the least total cost to the organization. Related term: Profit Center.

Cost of Delay. The money an organization pays to queue callers, when toll-free service is provided.

Cost of Inaction (COI). The costs of not moving forward with a project or not making CX improvements. These can include customer defection, brand damage, the costs of recurring problems, employee dissatisfaction and others. See Return on Investment.

Cost Per Contact. Total costs (fixed and variable),

divided by the total contacts for a given period of time.

Cost/Benefit Analysis. A term used to describe the process of comparing the value of a potential project with the cost associated with implementing the project.

Cross-Sell. A suggestive selling technique that offers additional products or services to current customers. See Upsell.

Cross-Train. To train agents to handle more than one defined mix of contact types or channels (e.g., to train technical support agents handling laptops to also support tablets or printers).

Customer Access Strategy. The overall strategy that defines how customers will interact with the organization. According to ICMI, it is “a set of standards, guidelines and processes describing the means by which customers and the organization can interact and are enabled to access the information, services and expertise needed.”

Customer Advocacy. Refers to the actions the organization takes to do what is best for customers, which, in turn, rewards the organization with loyal customers who become advocates (brand advocates) for the organization’s products and services.

Customer Care. A general term that refers to proactive customer service that creates high levels of customer satisfaction and loyalty. The term customer care center has become a popular variation of contact center.

Customer Effort Score (CES). A customer satisfaction metric, based on surveys that ask customers to rate how easy it was to resolve their issues. Typically based on a 7-point scale from “very difficult” to “very easy.”

Customer Experience (CX). Refers to all of the experiences customers have with an organization, including products, services, processes, policies, expectations, and other factors. More specifically, customer experience is: everything a prospect or customer hears about your organization; every interaction they have with your organization and its products and services; and, ultimately, how they feel about your organization. Related terms: Customer Advocacy, Voice of the Customer.

Customer Experience Management. The overall approach and specific steps involved in managing customer experience.

Customer Experience Management (CXM) Platform. A technology platform designed to perform core customer experience management tasks, such as funnel voice of the customer data into one system, organize, tag, show trends, establish scores, generate dashboards, illustrate return on investment (ROI), and provide suggestions on CX improvement.

Customer Journey. All interactions and touchpoints a customer has with an organization.

Customer Life Expectancy (CLE). Also called average customer lifespan. The average time (in days, months and years) that a customer is engaged or active with your organization.

Customer Lifetime Value. Expresses the value of a customer to the organization over the entire probable time period in which the customer will interact with the organization.

Customer Loyalty. Typically defined in terms of the customer's repurchase behavior, intent to purchase again or intent to recommend the organization. See Customer Advocacy.

Customer Persona. A representation of a typical customer or prospect, in written or graphical form.

Customer Premises Equipment (CPE). A telecommunications term referring to equipment installed on the customer's premises and connected to the telecommunications network.

Customer Relationship Management (CRM). The process of holistically developing the customer's relationship with the organization. It takes into account their history as a customer, the depth and breadth of their business with the organization, and other factors.

Customer Response Time. The time it takes the customer to read an agent's reply and send a response. Relates to chat or other customer interactions that require back and forth exchanges

with customers. See Chat for related terms.

Customer Retention Rate. The percentage of a prior period's customers who are still customers in the current period (excluding new customers acquired). Related term: Customer Loyalty.

Customer Satisfaction. The level of satisfaction customers have with the organization and the organization's products and services. See Customer Loyalty.

Customer Satisfaction Score (CSAT). A metric that gauges customer satisfaction, based on variations of the question, "How would you rate your experience?"

Customer Segmentation. The process of grouping customers based on what you know about them, in order to apply differentiated marketing, relationship and contact management strategies.

Customer Sentiment. A reflection of how your customers feel about your products, services and organization; analysis of many types of feedback produces a customer sentiment metric you can track.

Customer Success. The methods or approach for ensuring that customers are successful in using a supplier's products or services to achieve their objectives. Often used interchangeably with customer experience; however, the term is typically used in cases where customers are using technology-related products and services. See Customer Experience.

Customer Tolerance. How patient customers will be when they encounter queues and other inconveniences in service delivery. Related terms: Abandoned Contact, Queue Dynamics.

Customer-Controlled Routing (CCR). A vendor-specific term that refers to a call routing application that enables contacts to be handled (e.g., routed, queued, distributed) based on user-defined criteria.

Customer-Entered Digits. See Caller-Entered Digits.

Dashboards. Easy-to-comprehend graphical reporting of critical KPIs.

Data Mining. Generally refers to the use of analytics capabilities to analyze data, e.g., to identify trends and causal factors. Related terms: Big data, Analytics.

Day-of-Week Routing. A network service that routes calls to alternate locations, based on the day of week. There are also options for day-of-year and time-of-day routing.

Deflection Rate. In social media, the percentage of customer service issues that are transferred from social media to another communications channel, such as email, chat or phone.

Delay. Also called queue time. The time a customer spends in queue waiting for an agent to become available. Average delay is the same thing as average speed of answer. Related terms: Average Speed of Answer, Service Level.

Delay Announcements. Recorded announcements that encourage customers to wait for an agent to become available, and may encourage them to have their account number ready or provide other information.

Dialed Number Identification Service (DNIS). A string of digits that the telephone network passes to the ACD, IVR or other device to indicate which telephone number the caller dialed. One trunk group can have many DNIS numbers. See Automatic Number Identification.

Dialer. Dialers are technologies for automating the process of making outbound calls.

Digital Transformation. Broadly refers to harnessing digital technologies to improve efficiencies and create new or better experiences for customers and employees.

Direct Message. In social media, private messages to specific individuals or organizations.

Disaster Recovery Plan. See Business Continuity Plan.

Display Board. See Readerboard.

Double Jack. The ability to plug two headsets into one telephone or workstation so that two people can listen

to or participate in the same contact.

Driver-Based Forecasting. A form of explanatory forecasting. Any method of workload forecasting that is based on other identified activities or “drivers.” See Forecasting Methodologies.

Dual-Tone Multifrequency (DTMF). A signaling system that sends pairs of audio frequencies to represent digits on a telephone keypad. It is often used interchangeably with the term TouchTone (an AT&T trademark).

Elearning. See Technology-Based Training.

Email Response Management System (ERMS). A system that tracks and manages email contacts, similar to how an ACD tracks and manages inbound calls. See Omnichannel.

Embedded Media. Digital media that is displayed outside of its usual setting, such as a YouTube video shared in a tweet.

Emoji. Images used to convey emotions in digital communication (text messages, social media, etc.).

Employee Advocate. An employee who promotes and defends the company they work for, similar to customers who are brand advocates. Related term: Customer Advocacy.

Employee Engagement. Quantitative representation of the enthusiasm or emotional commitment an employee has to the organization and the work they do.

Employee Experience (EX). Similar to customer experience, but for employees. How employees perceive their total interactions with an organization. See Employee Engagement.

Empowerment. The authority and means provided to employees or customers to make decisions and take action.

Engagement Rate. The percentage of users who see a social media post and take action (e.g., share, reply or click to contact the organization).

Engset Calculation. Named after its developer, T. O. Engset, determines the probability of congestion occurring within a circuit group. Similar to Erlang B, though assumes a finite number of callers.

Enterprise Resource Planning (ERP). Generally refers to a system that manages back office functions. Related terms: Back Office, Front Office.

Envelope Strategy. A scheduling approach whereby enough agents are scheduled for the day or week to handle customer contacts and other types of work. Priorities are based on inbound workload. When the workload is heavy, all agents handle contacts, but when it is light, some agents are reassigned to work that is not as time-sensitive. Related term: Net-Zero Staffing.

Ergonomics. The science of fitting the workstation/work environment to the worker.

Erlang. One hour of telephone traffic in an hour of time. For example, if circuits carry 120 minutes of traffic in an hour, that's two Erlangs. Related terms: Erlang B, Erlang C, A.K. Erlang (listed as Erlang, A.K.).

Erlang B. A formula widely used to determine the trunks required to handle a known trunk load during a one-hour period. The formula assumes that if callers get busy signals, they go away forever, never to retry ("lost calls cleared"). Because some callers retry, Erlang B can underestimate trunks required. However, Erlang B is generally accurate in situations with few busy signals. Related terms: Bandwidth Calculator, Erlang C, Trunk Load.

Erlang C. Calculates expected waiting times (delay) based on three things: the number of servers (agents); the number of people waiting to be served (customers); and the average amount of time it takes to serve each person (average handling time). It can also predict the resources required to keep waiting times within targeted limits. Erlang C assumes no abandoned contacts or busy signals, so it has a tendency to overestimate staff required. Related terms: Computer Simulation, Erlang B, Service Level.

Erlang, A.K. A Danish engineer who worked for the Copenhagen Telephone Company in the early 1900s and developed Erlang B, Erlang C and other traffic

engineering formulas. Related terms: Erlang, Erlang B, Erlang C.

Error Rate. In a contact center, the number or percentage of defective (e.g., incomplete) interactions or the number or percentage of defective steps in an interaction.

Escalation Plan. A plan that specifies actions to be taken when workload queues begin to build beyond acceptable levels. See Real-Time Management.

Escalation. The process by which a customer contact is transferred to a specialist or a more senior representative (such as a supervisor or manager) to handle or resolve an issue.

Event-Driven Forecasting. Any method of workload forecasting that is based on individual activities that generate contacts. See Forecasting Methodologies.

Exchange. In chat, a part of a session that begins with an inquiry from the customer and concludes with a response from the agent. See Chat for related terms.

Exchange Handle Time. In chat, the time it takes for the agent to prepare and deliver a response during an exchange. See Chat for related terms.

Exchange Line. See Trunk.

Exchange Response Time. In chat, the time that elapses between the customer sending a question or comment and the delivery of the agent's response. See Chat for related terms.

Exit Interviews. Interviews with employees who are leaving the company or department, to gain candid and honest insight into why they are leaving, and ways the organization might improve to minimize turnover in the future. See Stay Interviews.

Expected Wait Time (EWT). A prediction of the wait time a customer can expect when entering a queue. Many contact center systems are capable of estimating wait times and announcing them to customers. Expected wait announcements are almost always used as part of Virtual Hold. Related terms: Queue, Visible Queue, Virtual Hold.

Explanatory Forecasting. See Forecasting Methodologies.

Fast Clear Down. A caller who hangs up immediately after hearing a delay announcement. Related term: Delay Announcement.

Finesse Standards. Quality standards that measure how something was done. Performance can happen in degrees, and so finesse standards are usually measured on scales (often three- or five- point scales). Related terms: Foundation Standards, Quality Standards.

First Contact Resolution. The percentage of contacts that are handled to completion in the initial interaction. The customer does not need to contact the contact center again, nor does anyone within the organization need to follow up. Related term: Errors and Rework.

First In, First Out (FIFO). With this approach, the first contact placed in queue is the first one out when an agent becomes available. Contacts are handled in the order received.

Flex Time Scheduling. Several weeks in advance, agents are promised schedules within a window of time (e.g., only Tuesdays through Saturdays or from 8 a.m. to 8 p.m. any day of the week), according to their personal availability. Then, specific work hours, and in some cases, days worked, are determined from week to week as forecasted staff requirements are refined. This approach may involve the entire staff, but usually includes only a subset of employees.

Flushing out the Queue. A real-time management term that refers to changing system thresholds so that calls waiting for an agent group are redirected to another group with a shorter queue or more available agents. Related term: Real-Time Management.

Focus Group. A group of customers or prospects that participate in a discussion to provide candid feedback on the organization and/or its products and services.

Forecast Accuracy. Formulas that measure the accuracy of a forecast against what actually happened, down to the interval. Related term: Forecasting Methodologies.

Forecasting Methodologies. Methods used to predict future events, such as the workload that will come into a contact center. Methodologies are broadly categorized into quantitative and judgmental approaches. Quantitative forecasts include time series forecasts (which assume past data will reflect trends that continue) and explanatory forecasting (which attempts to reveal a linkage between two or more variables). Driver-based and event-driven forecasting approaches are variations of explanatory forecasting. Judgmental forecasts go beyond purely statistical techniques, to involve intuition, interdepartmental committees, market research and executive opinion. See Forecasting.

Foundation Standards. Quality standards that measure whether something was done. Performance can be objectively measured by a yes or no—the employee either did it or did not do it. Related terms: Finesse Standards, Quality Standards.

Freytag's Pyramid. The components of an effective story, as identified by Gustav Freytag: exposition, inciting incident, rising action, climax, falling action, and resolution.

Front Office. Generally refers to customer-facing services and technologies. Related term: Back Office.

Full-Time Equivalent (FTE). A term used in scheduling and budgeting, whereby the number of scheduled hours is divided by the hours in a full work week. The hours of several part-time agents may add up to one FTE.

Gate. See Agent Group.

Generative AI. Generative artificial intelligence, which refers to algorithms that can create new or unique content, such as text, images, code, audio, video and other. Related term: Artificial Intelligence.

Geotagging. Technology that adds information on location to a photo, video, or social media message. With GPS-enabled smartphones, geotagging has become a core aspect of social media, search, photographs and location-based marketing and customer service.

Governance. The framework and team responsible for overseeing customer experience objectives, standards, policies and priorities.

Grade of Service (GOS). The likelihood that a call will not be connected to a system because all trunks are busy. Grade of service is often expressed as a probability, e.g., p.01, meaning 1 percent of calls will be blocked. Related terms: Erlang B, Service Level, Trunk Load.

Handled Call. Also referred to as handled contact. A contact that is received and handled by an agent or self-service system. Related terms: Answered Call, Offered Call, Received Call.

Handling Time. For a phone call, the time an agent spends in talk time and after-call work handling an interaction. Handling time can also refer to the average time it takes for an agent to handle any kind of contact (text, social, email, etc.) or the time it takes for a machine to process a transaction. See Average Handling Time.

Hashtag. In social media, a word or phrase preceded by the hashtag symbol, which enables users to find, sort or identify groups or topics (e.g., #customerservice).

Histogram. A type of graph that illustrates the underlying frequency distribution (shape) of a set of continuous data.

Historical Forecasting. Any method of forecasting that relies on the past (e.g., trends and patterns) to determine future projections. See Forecasting Methodologies.

Historical Report. A report that tracks contact center or agent performance over a period of time. See Real-Time Report.

Hold Out Forecasts. Forecasting the past to see how well a forecast model will predict the future, being sure to only use data that would have been available in the past. Allows comparison of various forecast models to see which is more accurate in specific circumstances or environments.

Hunt Group. See Agent Group.

Idle Time. Also referred to as available time, wait time, or in-between contacts. The time agents are available and waiting for contacts to arrive. The inverse of occupancy. See Occupancy.

Immutable Law. A law of nature that is fundamental and not changeable (e.g., the law of gravity). In an inbound contact center, the fact that occupancy goes up when service level goes down is an immutable law. See Queue Dynamics.

In-Between Contacts. See Idle Time.

Increment. See interval.

Incremental Revenue (Value) Analysis. A methodology that estimates the value (cost and revenue) of adding or subtracting an agent.

Index Factor. In forecasting, a proportion used as a multiplier to adjust another number.

Information Technology (IT). A generic term that refers either to computer and/or communications systems and technologies, or to the profession that develops and manages these systems.

Instructor-Led Training (ILT). Training delivered by an instructor. See Technology-Based Training.

Intelligent Routing. The use of information about the customer, current conditions or other parameters to route contacts to the appropriate group, individual, automated system, etc.

Intelligent Virtual Assistant (IVA). Bots that emulate human conversations, and used in customer service, technical support, marketing and other applications. The term is often used to describe advanced chatbot applications. Related terms: Chatbot, Robotic Process Automation.

Interactive Voice Response (IVR). An IVR system responds to caller-entered digits or speech recognition in much the same way that a conventional computer responds to keystrokes or clicks of a mouse. When the IVR is integrated with database applications, customers can interact with databases to check current information (e.g., account balances) and complete transactions (e.g., make transfers between accounts). Related term: Speech Recognition.

Interexchange Carrier (IXC). A long-distance telephone company.

Internal Part-Timers. A scheduling approach, sometimes called the reinforcement method. Employees working on other tasks are used as reinforcements when the call load gets heavy. Related terms: Schedule, Schedule Alternatives.

Internet “Call Me” Interaction. Allows a user to request a callback from the contact center, while exploring a web page.

Internet “Call-Through” Interaction. Refers to the ability for customers to click a button on a website and be connected to an agent (initiate a voice conversation) while viewing the site. Also referred to as “click-to-talk.”

Internet of Things (IoT). Extending internet connectivity to everyday objects such as washing machines, doorbells and refrigerators.

Internet Protocol (IP). The set of communication standards that control communications activity on the Internet. An IP address is assigned to every device on the Internet.

Interval. Also called increment. The timeframe used for staffing and reporting. In contact centers, 30-minute intervals are common, but intervals can be 15 minutes for large centers or 60 minutes for small contact centers or those that have relatively long average handle times.

Interval-Based Accuracy. A method of measuring forecast success that focuses on results by interval (usually half hours), rather than end of day, week or month results. See Forecasting Methodologies.

Intraday Forecast. A short-term forecast that assumes activities early in the day will reflect how the rest of the day will go.

Intraflow. See Overflow.

Intraweek Forecast. A short-term forecast that assumes activities early in the week will reflect how the rest of the week will go.

Invisible Queue. When customers do not know how long the queue is or how quickly it is moving. Related terms: Expected Wait Time, Queue, Visible Queue.

Job Description. An outline of the functions, responsibilities and requirements of a specific job.

Job Role. The function or responsibilities related to a specific position in an organization.

Journey Mapping. A visual tool to depict a customer’s experience with an organization.

Judgmental Forecasting. Goes beyond purely statistical techniques and encompasses what people believe is going to happen. It is in the realm of intuition, interdepartmental committees, market research and executive opinion. Related terms: Quantitative Forecasting, Forecasting Methodologies.

Key Performance Indicator (KPI). A high-level measure of contact center performance. Some interpret KPI as the single most important measure in a department or unit; however, in common usage, most centers have multiple KPIs. See Performance Objective.

Knowledge Management. Developing and leveraging an organization’s knowledge resources to prevent the need for employees to “reinvent the wheel.”

Law of Diminishing Returns. The declining marginal improvements in service level that can be attributed to each additional agent, as successive agents are added. Related terms: Immutable Law, Power of One.

Lean Six Sigma. A disciplined variation of Six Sigma that focuses on the elimination of different kinds of waste in production and service delivery. Related terms: System of Causes, Process, Six Sigma.

Least-Occupied Agent. When contacts are distributed to the agent who has the most idle time (lowest occupancy). Related terms: Longest-Available Agent, Next Available Agent.

Leave Without Pay (LWOP). Agents are offered the chance to leave work early, without pay, when workload is light. Pronounced “el-wop.” Related terms: Schedule, Schedule Alternatives.

Legacy Systems. Information systems or databases based on old technologies (e.g., mainframes).

Like. In social media, an expression of support for content. As with shares, comments, and favorites, likes can be tracked as an indication of engagement.

Load Balancing. In a network contact center, load balancing is the process of distributing (balancing) contacts between sites. Related terms: Contact-by-Contact Routing, Network, Network Control Center, Network Interflow, Percent Allocation.

Local Area Network (LAN). The connection of multiple computers within a building so that they can share information, applications and peripherals. Related term: Wide Area Network.

Location-Based Services. Services that are appropriate for or customized for specific locations. See Geotagging.

Logged On. A state in which agents have signed on to a system (made their presence known) but may or may not be ready to handle contacts. See Schedule Adherence.

Logical Agent. An agent identified by their login code rather than a physical position or phone number. See Agent Group.

Login Time. See Logged On.

Long Call. For staffing calculations and traffic engineering purposes, contacts that have average handling times that approach or exceed 30 minutes. See Average Handling Time.

Longest Delay. Also called oldest call. The longest time a customer has waited in queue, before abandoning or reaching an agent. See Service Level.

Longest-Available Agent. When contacts are distributed to the agent who has been in idle the longest. Related term: Next Available Agent.

Look-Ahead Queuing. The ability for a system or network to examine a secondary queue and evaluate the conditions before overflowing contacts from the primary queue.

Look-Back Queuing. The ability for a system or network to look back to the primary queue after the contact has been overflowed to a secondary queue and evaluate the conditions. If the congestion clears, the contact can be sent back to the initial queue.

Lost Call. See Abandoned Contact.

Machine learning (ML). Technology that enables programs to access and use data on their own, learn for themselves, and improve as they learn.

Make Busy. To make a circuit or terminal unavailable.

Managing Customer Feedback. The process by which an organization collects, analyzes and acts on customer feedback. This can be tactical (acting on feedback as it happens to solve problems or deliver personalized service) or strategic (collecting and analyzing feedback from many customers over time to look for recurring problems and opportunities).

Manual Answer. The ACD system is set up so that agents must manually answer calls. See Call Forcing.

Manual Available. The ACD system is set up so that agents must put themselves back into the available mode after talk time or completing any after-call work. See Auto-Available.

Measure. A fundamental, quantifiable unit, such as length, amount or size. Examples include the time it took to process a claim, and number of customers served. See Metric.

Mention. In social media, tagging a user's or an organization's account name or handle in a message. See Sentiment Analysis.

Metric. A quantifiable value that is often composed of more than one measure. For example, average cost of a service interaction incorporates both costs and the number of interactions. See Measure.

Modem. A contraction of the terms modulator/demodulator. A modem converts data from transmission media so that it can be transmitted.

Modular Jack. An interface that permits easy interconnection of devices or circuits.

Moments of Truth. Popularized by Jan Carlzon, former CEO of Scandinavian Airways, refers to the points in a customer journey where an organization has the most significant opportunities to positively or negatively impact customer loyalty.

Monitoring. Increasingly referred to as service observing or service evaluation. Monitoring is an evaluation process that appraises the qualitative aspects of handling contacts. Related terms: Calibration, Coaching, Contact Quality.

Monitoring System. A system that records contacts in order to have a permanent record of the complete interactions and to improve quality. See Monitoring.

Most-Idle Agent. See Longest-Available Agent.

Multichannel. A contact center that enables agents and customers to interact over multiple communication channels—e.g., phone, chat, text, email, social media or others. As industry terminology has evolved, multichannel refers to the ability to offer multiple channels, while omnichannel generally refers to a deep level of integration among channels, enabling them to work together seamlessly. See Omnichannel.

Multichannel Attribution. In marketing, analytics that aim to understand how customers discover, evaluate, purchase, and use products or services. (Example: seeing a product in a social post, doing a search, visiting the website, making an inquiry through chat or call, and then making a purchase online or in a retail store.)

Multimedia. Combining multiple forms of media in the communication of information (e.g., a traditional phone call is “monomedia,” and a video call is “multimedia”).

Multimedia Routing and Queuing. Systems and processes that handle contacts from various channels (phone, text, chat and others) based on business rules that define how any transaction, inquiry or problem is processed. See Omnichannel.

Mystery Shopper. A person acting as a customer interacts with the organization to assess quality and performance. See Monitoring.

Natural Language Processing (NLP). Enables computers to interpret, analyze and process human language. See Natural Language.

Nesting. A transition between training and working independently, when a new hire handles work alongside a trainer or experienced agent who provides help as needed.

Net Present Value. A method of determining the attractiveness of investments. The value of future cash flows over the life of an investment, discounted to the present.

Net Promoter Score (NPS). A specific methodology of gauging customer experience, based on the survey question “How likely is it that you will recommend us to others?”

Net-Zero Staffing. Creating staff schedules for peak hours and using the overages for coaching, projects, etc. so that each interval gets to a net of zero staffing. Related term: Envelope Strategy.

Network Control Center (NCC). Also called traffic control center or network operations center. A control center that oversees and manages a distributed contact center.

Network. The interexchange (IXC) or cloud-based services that route contacts into a center or among several centers.

Next Available Agent. A contact distribution method that sends contacts to the next agent who becomes available. When there is no queue, next available agent reverts to longest-available agent. Related term: Longest-Available Agent.

Non-ACD In Calls. Inbound calls that are directed to an agent's extension rather than to a general group. These may be personal calls or calls from customers who dial the agents' extension numbers.

Normalized Contacts Per Agent. Also called true contacts (or calls) per agent. It is actual contacts an individual or group handled divided by occupancy for that period of time. Related term: Adherence to Schedule, Occupancy.

Not Ready. See After-Call Work.

Occupancy. The percentage of time agents handle contacts versus wait for contacts to arrive; the inverse of occupancy is idle time. For a half hour, the typical calculation is: (contact volume × average handling time in seconds) / (number of agents × 1,800 seconds). Related terms: Adherence to Schedule, Utilization, Idle Time.

Off-Peak. Periods of time other than the contact center's busiest periods. Also a term to describe periods of time when long-distance carriers or utilities provide lower rates.

Offered Call. Offered calls (offered contacts) include all of the attempts callers make to reach the contact center. There are three possibilities for offered calls: 1) they can get busy signals; 2) they can be answered by the system, but hang up before reaching an agent; or 3) they can be answered by an agent. Related terms: Answered Call, Handled Call, Received Call.

Omnichannel. Systems and methodologies that integrate multiple channels to create a seamless customer experience regardless of channel. Customers may start out in one channel (e.g., a social platform or website) and move to another (e.g., phone, text, or chat); regardless, an omnichannel approach enables the organization and customers to interact seamlessly across channels. See Multichannel.

On-the-Job Training (OJT). A method of training that exposes the employee to realistic job situations through observation, guided practice, and while working on the job.

Onboarding. The process integrating a new employee into an organization and its culture (e.g., through orientation, training, nesting, etc.). May also refer to familiarizing new customers or clients with the organization's products and services.

Open Ticket. A customer contact (transaction) that has not been completed or resolved (closed). Related terms: First Contact Resolution, Response Time.

Outsourcing. Contracting some or all contact center services and/or technology to an outside company. The company is generally referred to as an outsourcer, service partner, or service bureau. See Insourcing.

Overflow. Contacts that flow from one agent group or site to another, based on current queue conditions.

Overtime. Time beyond an established limit (e.g., working hours in addition to those of a regular schedule or full work week, such as a 40-hour work week).

Pareto Chart. A bar chart that ranks events in order of importance or frequency.

Peaked Call Arrival. A surge of traffic beyond random variation. It is a spike within a short period of time. There are two types of peaked traffic—the type you can plan for, and situations that are impossible to predict. Related term: Interval.

Percent Allocation. A contact routing strategy sometimes used in multisite environments. Contacts received in the network are allocated across sites based on user-defined percentages.

Percent of Contacts Answered. Usually refers to the percent of contacts that are answered; the inverse is the percent of contacts that abandon. The term can also refer to the percent of contacts that agents choose to answer. See Abandon Rate, Call Forcing.

Percent of Contacts Transferred. The percent of contacts that are moved to another person or agent group. See Transfer.

Performance Objective. Usually stated as a quantifiable goal that must be accomplished within a given set of constraints, a specified period of time, or by a given date (e.g., reduce turnover by 20 percent within one year).

Performance Standards. See Quality Standards.

Performance Target. An interim improvement point at a specific point in time, when striving to attain a new level of performance. Related terms: Key Performance Indicator, Performance Objective.

Personalization. Customizing services for the needs and characteristics of individual customers, e.g., an IVR greeting that recognizes customers by name, or web pages tailored to individuals.

Pivot. A term sometimes used to refer to when a consumer changes their channel of communication with an organization—e.g., from chat to call. Related terms: Channel Hopping, Omnichannel.

Poisson. A formula sometimes used for calculating trunks. Assumes that if callers get busy signals, they keep trying until they successfully get through. Because some callers won't keep retrying, Poisson can overestimate trunks required. Related terms: Erlang B, Retrial Tables, Trunk Load.

Pooling Principle. Also referred to as the powerful pooling principle. It states: any movement in the direction of consolidation of resources will result in improved traffic-carrying efficiency. Conversely, any movement away from consolidation of resources will result in reduced traffic-carrying efficiency. A common contact center application is that if you take several small, specialized agent groups, effectively cross-train them and put them into a single group, you'll have a more efficient environment (if all other things are equal). Related terms: Agent Group, Queue Dynamics, Skills-Based Routing.

Post-Call Processing (PCP). See After-Call Work.

Power of One. A reference to the dynamic that at low service levels, adding even one more agent can greatly improve service level.

Priority Queuing Application. Programming that recognizes and “bumps” higher-value customers or those with more urgent needs up in the queue to ensure that they receive the most expedited service possible.

Private Branch Exchange (PBX). Also called private automatic branch exchange (PABX) or switch. A telephone system located at the contact center's site that handles incoming and outgoing calls. ACD software can provide PBXs with ACD functionality. See Automatic Call Distributor.

Private Network. A communications network established for the exclusive use of an organization or group of affiliated organizations.

Process. A system of causes. See System of Causes.

Process Improvement. Methods that guide ongoing diagnosis and improvements to processes

Process Mapping. A visual representation of a process, or how work is done.

Products or Services Per Customer. A performance measure—a simpler variation of sales per customer—products or services per customer can be a measure of cross-selling effectiveness. Related term: Sales Per Customer.

Project Management. An approach that keeps projects on track and within budget.

Profit Center. An accounting term that refers to a department or function in the organization that generates profit. While contact centers that are considered profit centers keep an eye on expenses, they emphasize and track activities that produce value for customers and the organization. Related term: Cost Center.

Prompted Digits. See Customer-Entered Digits.

Propensity to Contact. The likelihood or number of times customers contact the organization, typically on an annual basis. Typically, a numerical correlation between total contacts and total customers—for example, 4 would mean customers contact the organization an average of four times per year.

Pulse Survey. A survey that consists of a short set of questions provided on a recurring basis (e.g., every one or two weeks).

Quality. The attributes or characteristics of a product or service. See Quality Standards.

Qualitative Analysis. Analysis that interprets descriptive data and is usually expressed as text. Related term: Quantitative Analysis.

Quality Assurance Scorecard. A dashboard of metrics related to quality. See Quality Standards.

Quality Assurance. Also referred to as Quality Analysis. See Monitoring.

Quality Management System. Can refer to either the technologies that enable quality management or, more often, the totality of the technologies, tools and methods an organization uses to manage and improve quality.

Quality Monitoring. See Monitoring.

Quality Standards. Also referred to as performance standards. The requirements, specifications, guidelines or characteristics established for customer service and customer experience.

Quantitative Analysis. Analysis that focuses on numerical, mathematical or statistical data. Related term: Qualitative Analysis.

Quantitative Forecasting. Also known as statistical forecasting. Using statistical techniques to forecast future events. The major categories of quantitative forecasting include time series and explanatory approaches. Time series techniques use past trends to forecast future events. Explanatory techniques attempt to reveal linkages between two or more

variables. Related terms: Forecasting Methodologies, Judgmental Forecasting.

Queue. Queue literally means “line of waiting people.” Holds callers until an agent becomes available. Queue can also refer to a line or list of items in a system waiting to be processed (e.g., email or social media messages).

Queue Display. See Readerboard.

Queue Dynamics. Queue dynamics refers to how queues behave; e.g., when service level goes up, occupancy goes down. Related terms: Occupancy, Service Level.

Queue Minutes. See Queue.

Random Contact Arrival. The normal, random variation in how incoming contacts arrive. See Erlang C, Service Level.

Readerboard. Also called display board, queue display, wallboard or electronic display. A visual display, mounted on the wall or ceiling of a contact center, that provides real-time and historical information on queue conditions, agent status and contact center performance.

Real-Time Adherence Software. A function of workforce management software that tracks how closely agents adhere to their schedules. See Adherence to Schedule.

Real-Time Management. Making adjustments to staffing, schedules, priorities or systems in order to effectively respond to real-time conditions. Related terms: Queue Dynamics, Real-Time Report, Service Level.

Real-Time Report. Information on current conditions (e.g., number of contacts currently in queue).

Real-Time Threshold. A marker that is identified in advance (e.g., number of contacts in queue, longest in queue, etc.) that automatically initiates a certain response in a contact center.

Received Call. A call detected and seized by a trunk. Received calls will either abandon or be answered by an agent. Related terms: Answered Call, Handled Call, Offered Call.

Recorded Announcement. Announcements callers hear while waiting in queue. See Delay Announcement.

Relationship Survey. Also referred to as enterprise survey, a comprehensive survey that generates feedback on all key elements that can impact customer satisfaction. Questions on a relationship survey are broad and cover issues such as product quality, ease of use, price, service, and others. They are sent at random to a small percentage of customers on a regular basis. See Transaction Survey.

Resolution. A measure of when a problem or issue is actually resolved. Used in environments where the contact center's initial response may not fully resolve an issue. See Response Time.

Response Time. Expressed as "100 percent of contacts handled within N days/hours/minutes" (e.g., all email will be handled within 24 hours). It is the preferred objective for contacts that do not have to be handled when they arrive. See Service Level.

Retention. The opposite of turnover; keeping employees in the contact center. See Turnover.

Retrial. Also called redial. When a person tries again to complete a call after encountering a busy signal.

Return on Investment (ROI). Strictly speaking, this is the net income or savings divided by the amount invested for a specific initiative. In contact center use, ROI has come to define an overall method of estimating the value of an investment. See Cost of Inaction (COI)

Right-Party Contact. When making outbound calls, the number of genuine contacts required to reach the desired party/decision maker. It is a sum of the total contacts made until the person that you are targeting is reached.

Ring Delay. See Dynamic Answer.

Ring No Answer (RNA). A call that rings but is not answered.

Ring Time. The time it takes for an agent to answer once a call is delivered to them, if the system is configured for manual answer. See Manual Answer.

Robotic Process Automation (RPA). Software robots that automate tasks previously requiring humans—finding and maintaining information, calculations, transactions, and others. Related term: Intelligent Virtual Assistant (IVA).

Roll Over No Answer (RONA). A call that overflows to a secondary answer group but is not answered.

Root Cause. A primary cause of a problem or outcome. Can be identified through root cause analysis. See System of Causes.

Rostered Staff Factor (RSF). Alternatively called overlay, shrink factor or shrinkage. RSF is a numerical factor that leads to the minimum staff needed on schedule over and above base staff required to achieve your service level and response time objectives. It is calculated after base staffing is determined and before schedules are organized, and accounts for things like breaks, absenteeism and ongoing training. Related term: Base Staff.

Round-Robin Distribution. A method of distributing contacts to agents according to a predetermined list. Related terms: Next Available Agent, Longest-Available Agent.

Scatter Diagram. A quality tool that assesses the strength of the relationship between two variables. Is used to test and document possible cause-and-effect scenarios. See System of Causes.

Schedule. A plan that specifies when employees will be on duty, and that may indicate specific activities that they are to handle at specific times. A schedule generally includes the days worked, start times and stop times, breaks, paid and unpaid status, etc. See Schedule Alternatives.

Schedule Compliance. See Adherence to Schedule.

Schedule Efficiency. The percentage of intervals that are properly staffed. The measure is based on the difference between the number of staff actually scheduled and the number of staff actually required.

Schedule Exception. An activity not planned in an employee's schedule that becomes an "exception" to the plan. Related terms: Adherence to Schedule, Schedule, Schedule Alternatives.

Schedule Horizon. How far in advance schedules are determined.

Schedule Preference. A description of the times and days that an employee prefers to work. Related terms: Schedule, Schedule Horizon.

Schedule Trade. When agents are allowed to trade or "swap" schedules.

Scheduled Callback. A specified time that the contact center will call a customer, usually based on the customer's preferences.

Scheduled Staff vs. Actual. A performance measure that is a comparison of the number of agents scheduled versus the number actually in the center, involved in the activities specified by the schedule. Related term: Adherence to Schedule.

Screen Monitoring. A system capability that enables a supervisor or manager to remotely monitor the activity on agents' computer terminals. See Monitoring.

Screen Pop. A CTI application that delivers an incoming call to an agent, along with the data files pertaining to that call or caller. See Computer Telephony Integration (CTI).

Screen Refresh. The rate at which real-time information is updated on a display (every 5–15 seconds is common). Screen refresh does not correlate with the timeframe used for real-time calculations.

Seated Agents. See Base Staff.

Self-Service System. Systems that enable customers to access the information or services they need without the help of an employee.

Sentiment Analysis. Tools and methodologies used to assess the nature of a customer's views and feelings about an organization's products, services and brand. Related terms: Analytics, Influencer, Sentiment Aggregator, Social Media.

Service Bureau. See Outsourcing.

Service Level. Also called telephone service factor (TSF). A measure of how quickly contacts reach agents, service level is expressed as: "X percent of contacts answered in Y seconds"; e.g., 90 percent answered in 20 seconds. Contacts that must be handled when they arrive require a service level objective, and those that can be handled at a later time require a response time objective. See Response Time.

Service Level Agreement (SLA). An agreement—between departments within an organization or between a client organization and an outsourcer—that defines performance objectives and expectations.

Service Observing (or Service Observation). See Monitoring.

Session. The whole of an interaction, from "hello" to "goodbye." Relates to chat or other customer interactions that require back and forth exchanges with customers. See Chat for related terms.

Session. Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related terms.

Session Response Time. The time it takes the organization to respond to the initial request for a session from the customer. Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related terms.

Session Transaction Time. The time elapsed from the beginning of the initial exchange to close-out. Relates to chat or other customer interactions that require back-and-forth exchanges with customers. See Chat for related terms.

Shift Differential. An additional amount paid to agents who staff difficult times, such as overnight or weekends, or to agents with specific skill sets (e.g., bilingual).

Short Messaging Service (SMS). The communications protocol that mobile carriers employ to enable users to send and receive text messages.

Shrinkage. Includes all activities that takes an agent away from being available to handle contacts. Shrinkage factors include vacation, breaks, training, and other variables. See Rostered Staff Factor.

Silent Monitoring. See Monitoring.

Simple Smoothing. A statistical model used in forecasting. In simple smoothing, the average of actual volumes for a set number of past weeks is used to forecast the workload for the next week.

Simultaneous Contacts. When customers contact the organization through multiple channels, e.g., they send an email, text, and call, all at the same time in an attempt to see which alternative results in the fastest or most desirable response. Related term: Channel Hopping.

SIP Trunk. See Trunk.

Six Sigma. A disciplined process that focuses on developing and delivering near-perfect products and services. Sigma is a statistical term that measures process variation. Lean Six Sigma is a variation of Six Sigma that focuses on the elimination of waste. See System of Causes.

Skill Group. See Agent Group.

Skill Path. Skill paths focus on the development of specific skills rather than the progression of positions through the contact center and/or organization. See Career Path.

Skills-Based Routing. An ACD capability that matches a customer's specific needs with an agent that has the skills to handle that contact, on a real-time basis. Related terms: Agent Group, Pooling Principle.

Smooth Call Arrival. Calls that arrive evenly across a period of time. Virtually nonexistent in incoming contact centers. See Random Contact Arrival.

Social Listening. The process of finding and assessing what is being said and written in social media about an organization, product, service, person or other topic.

Social Media Management. The technologies and processes for managing social media, engaging audiences and measuring results.

Softphone. Telephony functions provided through a computer rather than a physical telephone.

Software as a Service. See Cloud-Based Services.

Span of Control. The number of individuals a manager supervises. A large span of control means that the manager supervises many people. A small span of control means that he or she supervises fewer people.

Special Causes. Variation in a process caused by special or unusual circumstances. Related terms: Common Causes, Control Chart.

Speech Analytics. Broadly refers to analytics applied to speech content, e.g., to call recordings. Related terms: Analytics, Text Analytics.

Speech Recognition. Speech recognition enables IVR systems to interact with databases using spoken language, rather than the telephone keypad. There are two major types of speech recognition used in contact centers: 1) directed dialogue or structured language, which is prompting that coaches the caller through the selections; and 2) natural language, which uses a more open-ended prompt, recognizing what the caller says without as much coaching. See Natural Language, Interactive Voice Response.

Split. See Agent Group.

Split Shifts. Schedule in which agents work a partial shift, take part of the day off, then return later to finish their shift. Related terms: Schedule, Schedule Alternatives.

Staff Sharing. When two or more organizations (or different units of an organization) share a common pool of employees, typically to meet seasonal demands. Related terms: Schedule, Schedule Alternatives.

Staff-to-Supervisor Ratio. See Span of Control.

Staffing Model. A statistical model that provides a quick and easy way to determine the staff required to handle a given workload at a desired level of service, while accounting for the variables and responsibilities that keep agents from handling contacts.

Staggered Shifts. Shifts across a team or agent group that begin and end at different times. For example, one shift begins at 7 a.m., the next at 7:30 a.m., the next at 8 a.m., until the agent group is fully staffed for the busy midmorning traffic. Related terms: Schedule, Schedule Alternatives.

Standard. When related to customer service, standards refer to the requirements, specifications, guidelines or characteristics you establish for customer service and the experiences you want to create.

Stay Interviews. Intentional conversations with employees on why they stay—what they like about their jobs, the organization’s culture and benefits, career development opportunities that could further engage them, etc. See Exit Interviews.

Strategic Staffing Plan. A forecast of future staffing requirements—which includes quantity and qualifications—generally over a one- to three-year timeframe. Related terms: Full-Time Equivalent, Schedule Alternatives.

Structured Feedback. Feedback that comes in an organized manner, the result of directly soliciting input from customers or employees. Surveys are a common example. See Unstructured Feedback.

Supervisor Monitor. Computer display that enables supervisors to monitor the contact handling statistics and schedules of their supervisory groups or teams.

Supervisor. The person who has frontline responsibility

for a group of agents. Related terms: Job Role, Monitoring, Span of Control.

Support Center. A contact center that provides technical support to internal or external customers. Also sometimes referred to as a help desk or service desk. Related term: Contact Center.

SWAT Team. The term some companies use for a team of employees not normally part of the contact center to act as “reservists” and be quickly reassigned to help handle contacts if needed. Related term: Schedule.

System of Causes. The variables that are part of a process. A contact center is a process or system of causes. See Process.

Talk Time. Also referred to as direct call processing. Everything from “hello” to “goodbye” in a call. In other words, it’s the time customers are connected with agents. Related terms: After-Call Work, Average Handling Time, Call Load.

Technology-Based Training (TBT). Also called elearning. Training that uses technology to deliver instruction, typically outside of the formal classroom environment. TBT can include computer-based training (CBT) or other technologies such as video or virtual reality. Related terms: Computer-Based Training, Instructor-Led Training.

Telemarketing. Generally refers to outbound calls for the purpose of selling products or services, or placing informational calls to customers, prospective customers or constituents.

Telephone Sales or Service Representative (TSR). See Agent.

Telephone Service Factor (TSF). See Service Level.

Temporary Employee. An employee hired for short-term projects or seasonal workloads.

Text Analytics. Broadly refers to analytics applied to text content, e.g., email or calls that have been converted into text documents. Related terms: Analytics, Speech Analytics.

Text Messaging. Composing and sending short electronic messages between two or more users on mobile or other devices. See Short Messaging Service (SMS).

Text-to-Speech (TTS). Enables a voice processing system to speak the words in a text field using synthesized—not recorded—speech.

Thread. A string of messages that make up a conversation, common in most forms of online communication.

Threshold. The point at which an action, change or process takes place.

Tiered Scheduling. An approach to allocating resources that defines a range of staffing requirements for a given time interval and places individuals in separate groups (tiers) within that range. For example, tier 1 may be scheduled for phone duty regardless of queuing conditions, but tier 3 won't sign on unless there are 15 or more contacts waiting in queue. Related terms: Schedule, Schedule Alternatives.

Time Series Forecasting. See Forecasting Methodologies.

Time to Proficiency. The time needed or taken by an individual to acquire the skills and knowledge needed to meet a specified level of performance.

Top-Down Forecasting. A methodology of predicting contacts that starts at the highest level and works down to intervals. For example, forecasting months, then breaking down to weeks, days, and intervals. See Bottom-Up Forecasting.

Touch-Tone. A trademark of AT&T. See Dual-Tone Multifrequency.

Touchpoints. Where, when, and how a customer interacts with a business. In customer experience management, touchpoints are typically the focus of journey maps.

Training Evaluation. The process of assessing the impact of a training program. There are generally four levels of evaluation: level 1: reaction; level 2: learning

evaluation; level 3: application to job; and level 4: evaluating the impact and ROI.

Transaction Survey. A survey that is specific to an interaction or service. Designed to tie satisfaction to specific touchpoints. See Relationship Survey.

Transfer. Moving a contact to another person or agent group. With warm transfers, the original agent stays on the line to introduce the customer or issue to the agent receiving the transfer. In cold transfers, the original agent transfers the interaction with no introduction.

Treatment Average Time. See Average Handling Time.

Trend Analysis. Analysis that examines past and current activity to predict the future.

Trending. A topic that is popular on social media at a given moment.

True Calls Per Agent. See Normalized Calls Per Agent.

Trunk. Also called a line, exchange line or circuit. A telephone circuit linking two switching systems. SIP trunking enables the ACD to send and receive calls via the Internet. See Trunk Load.

Trunk Group. A collection of trunks usually used for a common purpose. Related term: Trunk.

Trunk Load. The load that trunks carry. Includes both delay and talk time.

Turnover. Also referred to as attrition. When a person leaves the contact center or department. Turnover can be categorized as voluntary (when the employee decides to leave) or involuntary (when management makes the decision for the employee to leave). It can also be categorized as internal (the employee leaves for another position within the organization) or external (the employee leaves for another organization).

Unavailable Work State. An agent work state used to identify a mode not associated with handling telephone calls.

Unified Reporting. When data from different channels and systems are included on one reporting tool. This supports better analysis and decision-making. See Dashboard.

Uniform Call Distributor (UCD). A simple system that distributes calls to a group of agents and provides some reports. See Automatic Call Distributor.

Universal Agent. Also known as super agent. Refers to either: 1) an agent who can handle all types of issues, or 2) an agent who can handle all channels of contact (e.g., calls, email, text, social media and others).

Unstructured feedback. Feedback from customers that is not organized into predefined categories or responses—for example, a social media post. It comes in many forms and tends to be impromptu. See Structured Feedback.

Upsell. A suggestive selling technique of offering more expensive products or services to current customers during the sales decision. See Cross-sell.

User-Generated Content. Content that is created and published online by the users of a social or collaboration platform.

Utilization. The percentage of time that an agent is either handling or available to handle customer contacts, out of the total time they are paid to be in the contact center. See Occupancy.

Variance Report. A report illustrating the difference between projected and actual results.

Vendor. A third-party, external company that supplies goods or services to the contact center, support center or customer.

Video Chat. A communication channel that enables interactions that include audio and video.

Virtual Contact Center. A distributed contact center (call center) that acts as a single site for call handling and reporting purposes.

Virtual Hold. Technology that enables customers entering a queue to keep their place in queue, leave

a number for callback, and be connected to an agent (receive a call from the organization) when the next agent becomes available. They are usually presented with the option of a callback once expected wait time is relayed to them. Related terms: Expected Wait Time, Visible Queue.

Virtual Interviewing. Systems that ask candidates interview questions and record their answers for viewing at the organization's convenience.

Virtual Reality (VR). An immersive, interactive, computer-generated experience. It can be similar to the real world—walking through an existing city or visiting a virtual store. Or VR can be other worldly, e.g., with imaginary landscapes and very different living creatures. With augmented reality (AR), elements of the real world are “augmented” by computer-generated information (for example, virtually trying on different outfits).

Visible Queue. When customers know how long the queue that they just entered is, and how quickly it is moving (e.g., they see a visual estimate or hear a system announcement that relays the expected wait time). Related terms: Expected Wait Time, Invisible Queue, Queue.

Voice of the Customer (VOC). Broadly refers to tools, methods and collaboration that capture customers' input and perceptions, seek to understand customer needs and wants, and use captured data to improve products, services and processes. See Customer Experience.

Voice of the Employee (VoE). Broadly refers to tools, methods and collaboration that capture employees' input and perceptions, seek to understand the employee journey, and use captured data and input to improve the employee experience. See voice of the customer (VoC)

Voice over Internet Protocol (VoIP). Voice conversations transmitted over a TCP/IP network.

Voice Processing. An umbrella term that refers to any combination of voice technologies. See Interactive Voice Response.

Voice Variables. Refers to voice qualities, such as volume, pitch, inflection, pause, pace, word emphasis, enunciation and others. Together, voice variables project an image to customers.

Voicebot. A voice-activated chatbot. See Chatbot.

Wait Time (Agents). See Idle Time.

Wait Time (Customers). See Queue, Service Level.

Wallboard. See Readerboard.

Wallet Share. The portion of a customer's total spending in a product category that goes to a company or product. See Market Share.

Web Call-Through. Using voice over Internet (VoIP) technology, the customer clicks a button that establishes a voice line directly to the contact center.

Web Callback. By clicking a button, the customer lets the company know that he/she wants to be called back either immediately or at a designated time.

Web Chat. See Chat.

Web Collaboration. A broad term referring to the ability for an agent and customer to share content by pushing/pulling web pages and/or whiteboarding and page markup.

Weighted Smoothing. A statistical model used in forecasting. As in simple smoothing, the average actual workload for a set number of past weeks is used to forecast the workload for the next week, but it is a weighted average, as each of the past weeks is weighted so that older weeks weigh less heavily than more recent weeks. Weeks can be weighted based on events (such as billing) that impact the workload for that week or simply based on length in the past.

Whisper Transfer. An IVR capability, where the IVR relays information such as the customer account number before connecting the customer and agent.

Word of Mouth. Refers to customers telling others about their experiences.

Work State. An ACD-produced indicator of the status of a contact center agent's activity or status. See Agent Status.

Workforce Management (WFM). The process of forecasting the workload and determining staff and schedule requirements to achieve service level goals.

Workforce Management System (WFMS). Software system that, depending on available modules, forecasts workload, calculates staff requirements, organizes schedules and tracks real-time performance of individuals and groups. See Workforce Optimization.

Workforce Optimization (WFO). A broad description of the latest generation of advanced workforce management and quality systems, which include features such as multichannel/omnichannel forecasting and scheduling, quality monitoring and recording, scoring and coaching tools, analytics capabilities, technology-based learning, customer and employee surveys, advanced reporting capabilities, and others. See Workforce Management.

Workload. Often used interchangeably with call load. However, workload can encompass all contact channels, and can also refer to activities not related to handling customer interactions. See Call Load.

Wrap Codes. See Wrap-Up Codes.

Wrap-Up. See After-Call Work.

Wrap-Up Codes. Codes that agents enter to identify the types of contacts they are handling. The system can then generate reports on contact types by handling time, time of day, and other variables.

Y Jack. A device that splits a single port into two, allowing two headsets to be plugged into the same device.

Zip Tone. See Beep Tone



ABOUT



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Brad Cleveland is known globally as one of today's foremost experts in customer strategy and management. He has worked across 45 states, and 60 countries for clients as diverse as American Express, Apple, USAA, the University of California, and the federal governments of Australia, Canada, and the U.S. Brad was a founding partner in and former CEO of the International Customer Management Institute (ICMI). His books include *Contact Center Management on Fast Forward* (ICMI, 4th edition 2019) and *Leading the Customer Experience* (Kogan Page, 1st edition 2021).

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