

# How does your CX measure up?

Use this free tool to quickly evaluate how your contact centre's customer experience (CX) measures up.



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# Get started

If you're curious about how your contact centre is really performing day-to-day, you've come to the right place. Work through the questions in this handy guide and find out where you're excelling and where you're falling short to determine your strategic priorities.



## How to use this guide

There are three core chapters in this assessment. As you go through the chapters, select the rating that best describes your contact centre (basic, standard, advanced or optimised) and assign the number of points corresponding to that rating. Then, calculate your average rating per chapter, and finally your overall rating.

As technology changes, so too does customer behaviour and expectations. That means you need to be constantly looking for ways to update and improve your contact centre operations and customer experience. Make no mistake, this stuff matters: according to [2021 research from the CCMA](#) (Call Centre Management Association), 63% of consumers took their business elsewhere due to poor customer service.

Of course, to improve, you need to first understand how well your contact centre operation is performing now. To help you do that, we've listed some key performance indicators in three crucial areas:

- Customer experience
- Agent productivity
- Overall operational strategy

So, take five minutes away from everything else, grab a pen (or you can use a PDF editor if you want to keep notes digitally) and get started.

CHAPTER 1



# Rate your customer experience

## Self-service options

What tools and capabilities do you provide for your customers to solve simple issues themselves?

### Choose a rating:

- **Basic** – We have a static interactive voice response (IVR) choice tree with a finite number of ports. (1 point)
- **Standard** – We have unlimited IVR capacity and context-based phone tree logic. (2 points)
- **Advanced** – We can redirect voice calls to digital channels through omnichannel self-service, bots and IVR. (3 points)
- **Optimised** – We use actionable automation analytics and insights, natural language processing (NLP) and unstructured input processing. (4 points)

Points for self-service: \_\_\_\_\_

## Omnichannel flexibility

Does your contact centre meet customers on their preferred channels with quick responses and personalised experiences? Can you provide a consistent experience across different channels?

### Choose a rating:

- **Basic** – We have separate solutions from different vendors, with no integration across digital channels and no integration with voice. (1 point)
- **Standard** – There is an integrated agent experience across voice, text and email, provided by one vendor with unified routing and reporting. (2 points)

- **Advanced** – Our agents use a single window to access all digital channels and handle voice interactions (Facebook, Twitter, email, chat, in-app messaging etc) with unified routing and reporting. (3 points)
- **Optimised** – We use AI to analyse the content of enquiries and then skills-based routing to connect callers to the best teams and agents. (4 points)

**Points for omnichannel flexibility:** \_\_\_\_\_

## First contact resolution

How effective is your contact centre at resolving customer issues with a single contact? We know that multiple contacts can increase customer frustration.

**Choose a rating:**

- **Basic** – We have simple queue-based routing and customers are frequently transferred between agents. Customers must also call back repeatedly about unresolved issues. (1 point)
- **Standard** – We use data-driven routing and can retrieve data from back-end/CRM systems to make smarter connections. (2 points)
- **Advanced** – We use skills-based routing to find the best agent and have access to subject matter experts across the company. We have presence information so we can easily transfer or conference to resolve customer enquiries. (3 points)
- **Optimised** – We can easily escalate to video (no download required) for increased communication between our agent and expert, or customer and expert. (4 points)

**Points for first contact resolution:** \_\_\_\_\_

## Frictionless interactions

How well does your contact centre satisfy customers and deliver consistent experiences across different channels?

**Choose a rating:**

- **Basic** – Our responses across agent teams and various channels aren't consistent. (1 point)
- **Standard** – Our agent scripting tools are easy to update and allow flexibility while maintaining consistency. (2 points)
- **Advanced** – We have unified scripting, and all agents can access knowledge bases on every channel. (3 points)

- **Optimised** – We can proactively reach out to meet customer needs before they call, using outbound dialling that combines analytics with actionable insights. We can also make the right self-service answers easy to find. (4 points)

**Points for frictionless interactions:** \_\_\_\_\_

## Measuring customer satisfaction

How well do you evaluate customer satisfaction in your contact centre?

**Choose a rating:**

- **Basic** – Our stand-alone survey tools make it difficult to correlate survey results with specific interactions. (1 point)
- **Standard** – We use an IVR-driven survey after each call and can correlate responses with agents. (2 points)
- **Advanced** – There are surveys on every channel (voice and digital) after interactions and we get a unified view of our Net Promoter Score (NPS), or other industry standard measurement, across every channel. (3 points)
- **Optimised** – We have individual customer satisfaction scores and match our least-satisfied customers to our most skilled agents. (4 points)

**Points for measuring customer satisfaction:** \_\_\_\_\_

**What's your average score for customer experience?**

\_\_\_\_\_  
(1 = Basic. 1.1 to 2 = Standard. 2.1 to 3 = Advanced. 3.1 to 4 = Optimised.)

CHAPTER 2





# Rate your agent productivity

## Solutions that agents use

How good is the solution and infrastructure your agents rely on? Are they able to easily meet customers on their preferred channels?

### Choose a rating:

- **Basic** – Our agents have to toggle back and forth between separate solutions, which have little or no integration. (1 point)
- **Standard** – There's a unified platform for voice and basic digital (chat, email, text), which integrates with the CRM to reveal relevant customer information. (2 points)
- **Advanced** – We use a unified omnichannel platform on a single window for every interaction, including voice and advanced digital (messaging apps, social media, mobile etc). This integrates with CRM and back-end systems within a single application. (3 points)
- **Optimised** – We use a unified omnichannel platform, with CRM integration and scripting. There's also real-time agent assist (based on NLP) to guide our agents on the spot. (4 points)

### Points for agent solutions:

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## Agent training and development

How intuitive is your contact centre technology? Is it easy for new agents to get up and running quickly?

### Choose a rating:

- **Basic** – There are lots of different tools to learn and onboarding is slow. We can only do training and KPI assessments in person. (1 point)
- **Standard** – We can train and onboard agents remotely through a video-enabled curriculum, and our scripts are always there to help them handle customer enquiries. (2 points)

- **Advanced** – We use skills-based routing that leads the client to the right agent based on agent training, previous evaluations and interaction results. (3 points)
- **Optimised** – We help our agents continuously improve, with content analytics of their interactions (voice and digital) and tailored training recommendations. (4 points)

**Points for agent training and development:** \_\_\_\_\_

**Solutions that supervisors use**

Do your contact centre supervisors have a modern management solution that enables them to effectively manage agents, including those working remotely?

**Choose a rating:**

- **Basic** – Our supervisor assessments rely on ‘walking the floor’ and KPIs are based on basic metrics such as call duration. (1 point)
- **Standard** – We use call recording with ‘monitor’, ‘whisper’ and ‘barge-in’ features so we can help agents in real time. Our KPIs are based on qualitative metrics such as customer satisfaction, business outcome per agent, etc. (2 points)
- **Advanced** – We proactively monitor interaction quality on every channel (voice and digital) and use team messaging solutions to coach agents in real time. Our supervisors can check and approve digital interactions before allowing agents to send them. (3 points)
- **Optimised** – We can spot customer trends and issues and change our behaviour quickly, with real-time speech and text analytics. (4 points)

**Points for solutions that supervisors use:** \_\_\_\_\_

**Workforce optimisation**

Do you have a modern management solution that helps you get the most from your workforce?

**Choose a rating:**

- **Basic** – We manage our workforce using simple tools like worksheets. There is often a mismatch between staffing levels and call volumes. (1 point)
- **Standard** – We use historical call volumes and real-time adherence to manage our workforce. Agents can trade shifts, request days off, plan for training, etc. (2 points)

- **Advanced** – We generate staffing forecasts for all channels based on historical call and digital interactions. Agents can trade shifts, request days off, plan for training, etc. (3 points)
- **Optimised** – We use AI and machine learning to optimise staffing. Our contact centre is fully staffed with little to no agent downtime and no long customer queues. (4 points)

**Points for workforce optimisation:** \_\_\_\_\_

**Collaboration with experts**

How easily can your agents collaborate with others to resolve customer issues?

**Choose a rating:**

- **Basic** – It’s difficult to collaborate with others because there is no integration between our unified communications platform and contact centre solution. (1 point)
- **Standard** – We have a shared directory so agents can see who is available across the entire company. They can then efficiently transfer customers to experts or conference in the expert. (2 points)
- **Advanced** – Our agents can easily collaborate with colleagues in real time, through messages, video and voice calls. (3 points)
- **Optimised** – We use bots to identify the best expert in the company based on topic, and our agents can find the best resources in real time, while on a call. (4 points)

**Points for collaboration with experts:** \_\_\_\_\_

**Open APIs for integration and workflows**

To what extent can you use APIs to customise workflows and integrate with apps integral to your business?

**Choose a rating:**

- **Basic** – Any integration with back-office systems and workflows requires extensive development, and specialised resources to set up and maintain. (1 point)
- **Standard** – We can easily integrate with business communications tools and data sets through open REST (Representational State Transfer) APIs for voice and digital interactions. (2 points)

- **Advanced** – We have a unified digital and voice support platform, with integrated business communication tools and data sets. (3 points)
- **Optimised** – We have custom workflows to automate tasks, which integrate easily into our communication and customer support platform. This improves our productivity. (4 points)

**Points for open APIs:** \_\_\_\_\_

**What's your average score for agent productivity?**

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(1 = Basic. 1.1 to 2 = Standard. 2.1 to 3 = Advanced. 3.1 to 4 = Optimised.)



# Rate your overall strategy

## Growth plans

What is your contact centre's overall growth strategy including cloud, vendor management and futureproof technologies?

### Choose a rating:

- **Basic** – We have multiple vendors. Each vendor provides a technology that is deployed across multiple sites and needs to be physically installed and upgraded. (1 point)
- **Standard** – We've consolidated our voice unified communications and contact centre platforms into the cloud. We benefit from centralised routing, unlimited burst capacity and simple monthly upgrades in the cloud. (2 points)
- **Advanced** – We have full cloud and digital transformation within the customer interaction strategy. This provides a single solution for customer engagement departments. (3 points)
- **Optimised** – We operate digital-first customer engagement with unified analytics and actionable business intelligence across every interaction touchpoint. We map customer journeys and proactively engage with them to maximise business outcomes. (4 points)

### Points for growth plans:

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## Transitioning to a profit centre

Does your contact centre infrastructure enable greater efficiencies and agent productivity? Are you transforming your contact centre from a cost centre into a profit centre?

### Choose a rating:

- **Basic** – Our contact centre is primarily used as customer support. Our KPIs incentivise short calls and agents are not empowered to make decisions. (1 point)

- **Standard** – We train our agents in customer outreach (inbound/outbound/blended) and our KPIs incentivise customer satisfaction and business outcome. We use outbound in low-traffic periods for potential up-sales. (2 points)
- **Advanced** – We decrease our costs by deflecting calls to digital channels, and use NLP for automation. We invest in agent training and tools to solve advanced problems, such as access to experts, real-time knowledge bases, etc. (3 points)
- **Optimised** – We have AI-driven proactive customer engagement throughout the entire customer life cycle, with intelligent scripting and tailored interactions per customer. (4 points)

**Points for profit centre transition:** \_\_\_\_\_

## Cost effectiveness

How cost effective is your contact centre technology? Consider the costs associated with managing multiple contact centres, vendor relationships, software and infrastructure.

**Choose a rating:**

- **Basic** – There are significant costs in managing each system, such as hardware/software deployments and upgrades. (1 point)
- **Standard** – We've reduced capital expenditures with cloud deployment, and saved on integration costs by having a single vendor for unified communication as a service (UCaaS) and contact centre as a service (CCaaS). (2 points)
- **Advanced** – We've consolidated voice and digital with one vendor. We use one window for every digital communication across the entire company, with smart routing to the corresponding teams. (3 points)
- **Optimised** – We use analytics to identify large interaction volumes per theme and use bots with NLP to automate answers. We only use agents for more advanced and complex tasks. (4 points)

**Points for cost effectiveness:** \_\_\_\_\_

## Support for remote agents

How well can you support remote or work-from-home (WFH) agents with your current contact centre solution?

### Choose a rating:

- **Basic** – We're unable to support remote teams. (1 point)
- **Standard** – We can support agents who have a simple data connection, through cloud deployment and voice over Web Real-Time Communications (WebRTC). (2 points)
- **Advanced** – Our agents can work from home on any channel (digital or voice) with call deflection to digital channels to reduce call wait times. (3 points)
- **Optimised** – We use our entire UCaaS portfolio to run daily team meetings, celebrate wins, recruit, onboard, train and provide feedback to remote teams via messaging, video and voice. (4 points)

### Points for remote agent support:

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## Innovation (AI and NLP)

Does your current contact centre solution make use of advanced technologies (such as AI, messaging, bots, etc) to improve the agility of your business?

### Choose a rating:

- **Basic** – We have legacy equipment which doesn't allow for AI/NLP integration. (1 point)
- **Standard** – We have a cloud IVR with open APIs that enable integration with leading AI/NLP providers such as Google, Amazon Web Services and more. (2 points)
- **Advanced** – We can optimise interactions by either using bots to answer simple queries, or by automatically gathering information up front and then routing the query (with full context) to an agent with the right skills. (3 points)
- **Optimised** – Through open APIs, we can integrate with leading AI/NLP providers. Our AI understands customer questions (on voice or digital) and provides our agents with the best answer in real time, based on machine learning. (4 points)

### Points for innovation:

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## Security

How well do you protect your customer data and maintain security and compliance?

### Choose a rating:

- **Basic** – It's hard to maintain compliance. We have yearly certification assessments and invest in experts to maintain the security of our on-premises equipment. (1 point)
- **Standard** – We get the latest certifications for compliance from the cloud, such as Payment Card Industry Data Security Standards (PCI DSS), General Data Protection Regulation (GDPR), etc. (2 points)
- **Advanced** – We draw on the expertise of advanced security experts, with cloud applications running in the public cloud. (3 points)
- **Optimised** – Top security talent from third-party providers carry out regular penetration testing and assessments for us. These identify and fix any vulnerabilities, protecting our customer data. (4 points)

Points for security: \_\_\_\_\_

### What's your average score for overall strategy?

\_\_\_\_\_  
(1 = Basic. 1.1 to 2 = Standard. 2.1 to 3 = Advanced. 3.1 to 4 = Optimised.)



Now it's time to tally up your points and find your average score. Add all section points up and divide the result by three or [use an online calculator](#) to find the average. Once you have your score, see how you measure up to your peers in the table below.

## Your overall score

Industry type	Average peer score (/4)	Industry type	Average peer score (/4)
Aerospace & defense	2.5	IT services	2.5
Agriculture forestry & fishing	2.6	Manufacturing	2.5
Automotive	2.5	Media / entertainment	2.5
Banking	2.6	Mining & natural resources	2.5
Chemicals	2.5	Non-profit organisation	2.5
Civilian government	2.6	Other / combination	2.7
Construction & Engineering	2.5	Pharmaceuticals	2.6
Consumer Products	2.5	Public sector	2.5
Education (Higher / University)	2.6	Local government	2.4
Education (Primary / Secondary)	2.6	Retail	2.5
Energy	2.5	Service provider / professional services	2.7
Central government	2.6	Telecommunications	2.5
Financial Services	2.5	Transportation & logistics	2.5
Healthcare	2.6	Travel	2.6
High technology software & hardware	2.5	Utilities	2.5
Hospitality	2.5	Wholesale & distribution	2.5
Insurance	2.4		

## Your next steps

That's your evaluation done. Now you can see where your strengths and vulnerabilities lie. Did you get the score you imagined you would? Perhaps a bit lower than expected? Or did you discover your contact centre is way more capable than you thought it was?

Now you know how you measure up, the next step is considering what your business priorities are. These should be the things that matter most to your company and your customers. They could be:

- Boosting agent performance
- Enabling working from home
- Adding more digital channels
- Improving reporting and analytics
- Measuring customer satisfaction
- Moving to the cloud
- Increasing automation (such as bots and AI)
- Integrating UCaaS and CCaaS

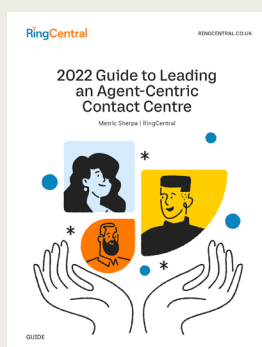
By combining your business priorities with the insights from this tool, you can create a better CX improvement strategy for your contact centre – one that's focused on a clear understanding of where you are now, and where you want to get to in the future.

Once you've had a chance to take in everything you've learnt, make sure to [book a meeting](#) with one of our expert team to talk about your priorities and the future of your CX.

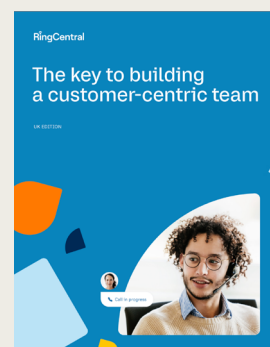
Before you go, here are some handy resources to help you in each area



[This eBook](#) shares advice on improving your overall CX



[This guide](#) tells you all you need to know about becoming an agent-centric leader



[This eBook](#) gives insight on how to make your contact centre more cost effective (among other helpful tips)

Good luck! You've already made a great start on this journey.

# About RingCentral

RingCentral, Inc. (NYSE: RNG) is a leading provider of business cloud communications and contact centre solutions based on its Message Video Phone™ (MVP™) global platform. More flexible and cost effective than the on-premises PBX and video conferencing systems it replaces, RingCentral helps employees communicate across devices from wherever they are. RingCentral offers three key products. RingCentral MVP™ combines team messaging, video meetings, internet phone and other functionalities in a single interface. RingCentral Video™, along with its team messaging feature, enables Smart Video Meetings™. RingCentral Contact Centre™ gives companies the tools they need to connect with customers across channels. These are available on an open platform that integrates with hundreds of third-party apps and makes it simple to customise workflows. RingCentral is headquartered in Belmont, California, USA, and has offices around the world.

For more information, please contact one of our solution experts. Visit [ringcentral.com/gb/en/effortless-customer-engagement](https://ringcentral.com/gb/en/effortless-customer-engagement) or call 0800 098 8136.