Insite's Operational Assessment Delivers a Strategic Roadmap— Identifying Millions in Potential Savings

The client, a for-profit, accredited university, faced significant operational and technical challenges after implementing a new CCaaS platform. With a high volume of calls and a complex setup across 36 campuses, the university sought an external assessment to optimize its contact center performance and improve student experience. Insite conducted a comprehensive assessment, providing a clear roadmap to address performance gaps and unlock substantial ROI.

$1M

In Potential Annual Savings Identified

31%

Inbound Answer Rate Used to Create a Strategic Roadmap for Improvement

Challenges

The client's recent expansion and open admission policy placed significant demands on its contact center. The new Five9 CCaaS platform, implemented a year prior, had significant configuration challenges, leading to major performance gaps. The university had 1001 Five9 agents, with 320 dedicated to admissions, but lacked in-house Five9 expertise and consistent support.

Over a 15-week period, the inbound Answer Rate was only 31%, with many calls routed to voicemail and queue callback (both 18%) or transferred (7%). Outbound calls also showed a low 10.6% success rate. With over 1,000 agents and a high number of IVR configurations, skills for routing, and campaigns, the university needed to identify how to reconfigure its system to improve call abandonment rates and overall operational efficiency.

See how we leverage cross-industry expertise and data-backed methodologies to help you optimize your operations and reach performance goals.

To meet the mark, your operations must be competitively productive and efficient. To exceed the mark, your processes, people, platforms, and partners need to set the industry-leading benchmark. That's where Insite comes in.

Solutions

Insite provided a comprehensive assessment of the client's operations, focusing on the implementation and configuration of the Five9 platform. The solutions included:

- **In-depth Analysis of Five9:** A deep analysis of the Five9 IVR and related telephony systems to identify technical misconfigurations and inefficiencies.

- **1:1 Discovery Sessions and Shadowing:** Insite conducted one-on-one sessions with key employees to map out and validate current processes, understand their experiences, and gather essential information.

- **Data-driven Process Mapping:** Client data was used to quantify the impact of current processes and create a detailed MegaMap of the university's operations. This led to the creation of a clear Opportunity Index outlining key recommendations.

Results

Insite's assessment identified key opportunities for improvement and provided a clear path to achieve significant ROI. The key recommendations and their potential impact are summarized below:

- **Staggered Shifts & Call Volumes:** Implementing workforce management processes to align employee shifts with call demands was projected to increase Answer Rate and yield over $1 million in annual savings.

- **Lack of Accountability & Coaching:** The recommendation for Coaching Training was projected to improve accountability and efficiency, resulting in $444,000 annually in savings.

- **Tool Misconfigurations & Productivity Gaps:** Addressing misconfigured portions of the Five9 tool with Five9 Enhancements was expected to increase productivity and enhance student experience, saving an estimated $216,000 annually.

- **Reliance on Tribal Knowledge:** Implementing a Knowledge Management System (KMS) would reduce reliance on undocumented knowledge, leading to a projected 2% increase in First Call Resolution (FCR) or $444,000 in annual savings.

- **No Standardized QA Tools:** Insite recommended implementing Five9 Enterprise QM, which is projected to increase FCR and create $428,571 in annual savings.

- **Lack of Performance Visibility:** A Universal Dashboard (Power BI) was recommended to provide a single source of truth for leaders, ensuring alignment across the organization and generating $444,000 in savings.

- **Incorrect Five9 Setup:** Offering Five9 Change Management Support was projected to result in a 1-3% increase in efficiency for Five9 users, saving approximately $445,000 in the first year.

Conclusion

Insite's expertise in conducting comprehensive operational assessments and leveraging data delivers a strategic roadmap for success. By meticulously analyzing the client's contact center, Insite identified critical performance gaps and provided a clear, actionable plan to optimize operations, improve student experience, and achieve multi-million dollar savings.

As an implementation partner, Insite will work with your team to implement these recommendations, transforming a chaotic environment into a streamlined, high-performing organization.