



achieve

Blue Pumpkin Advisor Enterprise

PRODUCT BRIEF

▶ NOW YOU CAN:

- ▶ Manage to Excellence™ to create competitive advantage
- ▶ Align operational metrics with corporate goals and business strategies
- ▶ Empower employees to become more self-managing and motivated to improve their own performance
- ▶ Use industry best practices benchmarking to define and set targets for Key Performance Indicators
- ▶ Identify off-performance metrics and generate manager alerts
- ▶ Consolidate diverse information into a single view of performance
- ▶ Dramatically reduce management time needed to assess performance

INCREASE EMPLOYEE PERFORMANCE AND REACH YOUR COMPANY GOALS

Managing organizational performance has long been known to be the key to higher customer satisfaction, employee productivity, overall quality, and corporate profitability. However, managers have lacked the visibility into their own operations that is necessary to ensure performance is consistent with business objectives and to implement course corrections as needed.

Performance Management encompasses a set of processes that include:

- Setting overall objectives, goals, and key metrics
- Integrating and extracting performance information from multiple systems
- Regular tracking, communicating, reporting and collaborating necessary to improve results

Implementing Performance Management processes before has been manually intensive, utilizing such basic tools as spreadsheets and ACD reports. These processes are typically expensive to build and maintain, and do not provide the measurement granularity or frequency required to effectively measure performance.

Blue Pumpkin® Advisor Enterprise is an application especially designed to overcome these barriers and make it easier for you to manage a complex set of Performance Management processes. The Advisor Enterprise application measures, tracks, and reports individual performance and facilitates collaboration among managers and agents to drive the actions necessary to achieve business goals. Blue Pumpkin, in conjunction with offerings from Gartner Measurement, also offers industry-specific benchmarking services and data that enable you to manage performance in the broader context of other contact centers and your competitors. Our complete Performance Optimization solution combines the Advisor Enterprise application, benchmarking, plus professional services to help you implement customized key performance indicators, establish appropriate goals for each, and integrate Advisor Enterprise with your enterprise data sources.

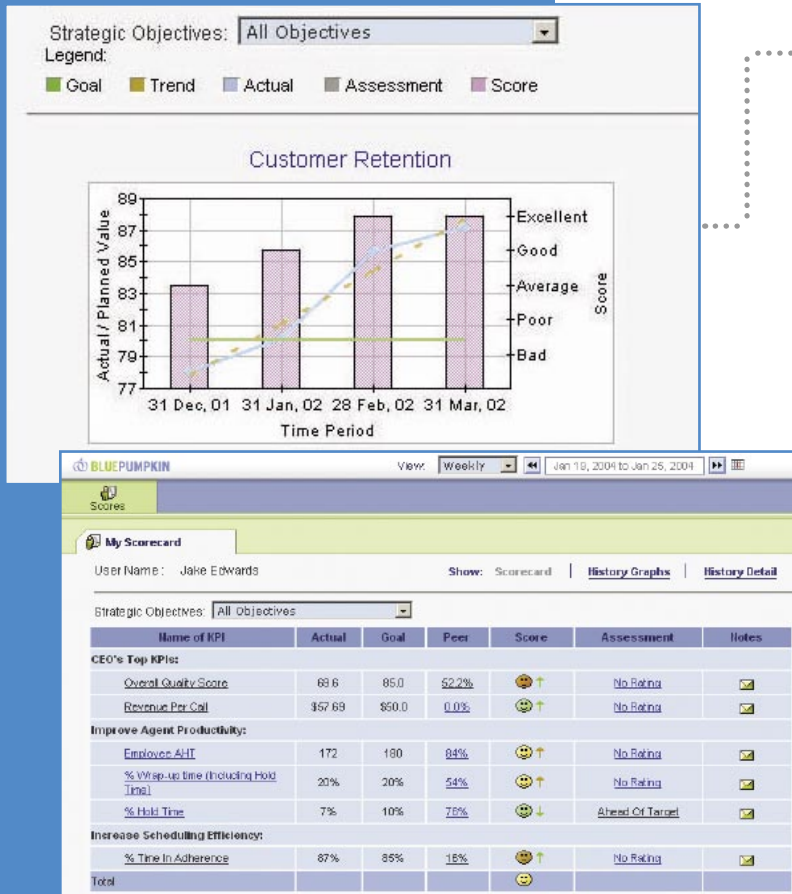
YOUR CORPORATE GOALS ARE CLOSER THAN YOU THINK

Advisor Enterprise enables you to automate and accelerate the Performance Management process, generating performance improvements such as reduced costs, improved quality, and increased revenue.

By providing one system for establishing performance targets and then measuring and communicating progress, Advisor Enterprise aligns the efforts of all functional groups and ties their personal and group objectives to corporate goals. Advisor

benchmarked

Advisor Enterprise provides a personalized view of performance against established goals.



Advisor Enterprise scorecards show performance for each KPI relative to established benchmarks, other individuals, groups, or even other sites.

"Like the other Blue Pumpkin suite elements we are using, their newest performance management solution Advisor is already showing immediate returns. Advisor gives us a daily pulse of our people's performance, which is critical to measuring our progress. We can take those new insights and turn them into action with other suite solutions—ensuring consistently high service levels and guiding our operations forward."

Mark Brannan
Contact Center Operations Director
Timberline

Enterprise motivates individual employees to perform better, predicts results, and pinpoints the people and business drivers responsible for success and failure. Insights and immediate access to performance information empower management to provide stronger leadership, resolve issues quickly, and extend successes across your organization.

Track Performance with a Personalized Dashboard

The first step in managing performance is establishing role-appropriate Key Performance Indicators (KPIs) with personalized goals for agents, supervisors, schedulers, front-line managers, and even executives. Advisor Enterprise enables you to address the unique needs of each user community and indeed each individual, setting proficiency-based goals founded on corporate objectives, established performance benchmarks, and employees' specific roles.

Blue Pumpkin Advisor Enterprise provides Web-based dashboards that offers a personalized view of performance for individuals at every level of your organization. Advisor Enterprise provides a summary of individual and team performance against stated goals or performance metrics. So, everyone has instant visibility into their own performance and that of their top-performing peers.

Find Performance Problems Early—Before They Become Concerns

The Blue Pumpkin Advisor Enterprise "Highlighter" feature is used to identify exceptions and trends—positive and negative—in everyone's performance. In the office or on the road, use it to identify specific performance situations at an employee or team level so immediate and specific action can be taken.

Highlighter can help you predict the behavior of KPIs and provide an early warning system to flag those performance indicators whose results may fall positively or negatively outside of an acceptable range of values. Highlighter can also show the trend of scorecard elements that are degrading over time, suggesting the need for proactive management intervention.

When a KPI is highlighted, Advisor Enterprise provides an option to notify the appropriate manager, immediately raising visibility of a performance problem as well as a reward situation where an employee is exceeding performance objectives and may be a candidate for special recognition.

Benchmarks Provide Actionable Information

Benchmarking is critical to formulating a plan of action to achieve your business objectives.

A "Benchmark" is a standard of performance or a point of reference that, based on actual data and comparative analysis, makes it possible to compare performance among individuals, groups, sites, or even relative to competitors.

Contact Center Performance Benchmarking, part of Blue Pumpkin's Performance Optimization solution and complimentary to Advisor Enterprise, provides the best-practices context, data, and industry-specific expertise companies need to effectively measure and improve performance. Featuring elements from Blue Pumpkin and Gartner Measurement, including pre-defined "KPI Packs" and associated data, this benchmarking offering helps companies drive highly differentiated customer service and create competitive advantage through the contact center.

Further, internal peer benchmarking enables employees to see how they are performing against their fellow workers. This increased visibility often motivates them to exceed not only their own performance goal, but also the performance level of their peers.

Open Communication Improves Performance

Effective and timely communication among managers and their direct reports is critical to achieving your business objectives. This is especially true when managing performance. Review periods, particularly annual and bi-annual periods, leave too much time between performance and feedback.

Blue Pumpkin Advisor Enterprise includes features that facilitate open communication throughout your organization related to monitored activities and KPIs. Advisor Enterprise enables managers to add commentary regarding specific KPIs and employees can offer responses or pose questions to ensure activity is accurately communicated and performance is fairly assessed.

Powerful Configuration Capabilities Eliminate "One Size Fits All"

In many operations, agents throughout the organization are being measured against the same objectives and KPIs. For example, in a multi-site contact center, all agents responding to customer telephone calls may be measured against Average Handle Time. To provide consistent measurement, it is critical that the way this KPI is calculated is identical for all these agents.

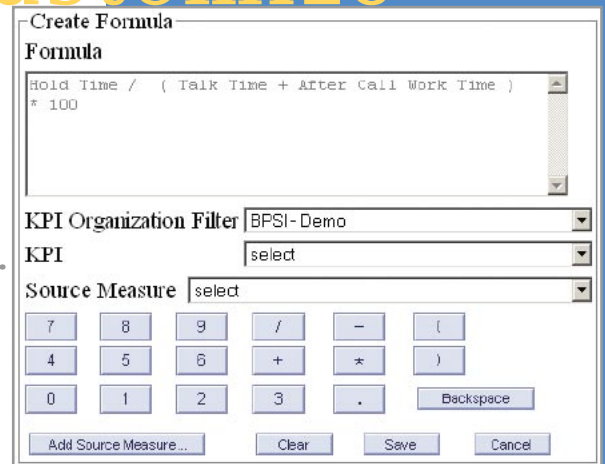
At the same time, where roles and activities are different among employees, it's equally important for goals to be established and calculated according to what is appropriate for each individual.

Using Advisor Enterprise, KPIs are defined as simple arithmetic formulas, easily customized and personalized to fit each role and metric. Once developed, the formulas are just as easily shared among your departments and sites to ensure consistent measurement of performance against identical KPIs.

Automate Integration To All Enterprise Data Sources

The larger the number of data sources integrated into the Performance Management solution, the richer the mix of KPIs that will be available to effectively measure business performance and trends.

customize



Use the intuitive Advisor Enterprise calculator function to create KPI formulas. Then share them as appropriate with other departments and sites that are using the same KPIs to ensure consistent performance measurement company-wide.

integrated



Advisor Enterprise is able to pull data from disparate enterprise data sources, ensuring a rich mix of performance measurements.

Advisor Enterprises includes enterprise software integration capabilities that ensure the availability and scalability of your Workforce Optimization applications and connects them with your existing information systems. Using our integration engine, you can automate integration with enterprise databases as well as spreadsheets and desktop databases.

APPLY BEST PRACTICES TO YOUR BUSINESS

To further assist with the integration and implementation of Advisor Enterprise, the Blue Pumpkin Professional Services group, working with Gartner Measurement, is available to apply extensive industry experience to your unique situation. Our consultants provide you with a detailed implementation plan that identifies appropriate KPIs for your industry and your company, industry benchmarks and appropriate performance ranges for each, and works with you to create appropriate processes for measuring and improving performance on an on-going basis.

Blue Pumpkin Strategic Consulting provides best-practices consulting services to help you rapidly realize the benefits of Performance Management. By drawing from extensive industry experience, Blue Pumpkin consultants recommend specific practices and policies that will significantly improve your ability to achieve business objectives, all while controlling operating costs.

But often creating new business practices is not enough. Employee behavior must change and contact center personnel must embrace the new policies for them to have optimal impact. Accordingly, Blue Pumpkin consultants are also experts in Change Management. During implementation we work directly with your workforce to obtain employee buy-in, resulting in successful adoption of new Performance Management initiatives.

Blue Pumpkin Strategic Consulting will:

- Ensure best workforce-to-workload match
- Reduce labor inefficiencies
- Identify appropriate KPIs that are right for your business goals and operations
- Ensure buy-in at all levels of the organization to increase the benefits received from full adoption of Performance Management initiatives
- Optimize your existing capital and defer capital expenditures

ABOUT GARTNER BENCHMARKING

Gartner Measurement offers benchmarking solutions that include valuable data, services, and proven expertise. The specific deliverables are:

- Specific KPIs that Gartner Measurement has determined are the optimal set for measuring performance of contact centers. A core set of Gartner Measurement KPIs are defined and delivered “out-of-the-box” with Blue Pumpkin Performance Optimization solutions, Advisor Express and Advisor Enterprise. Additional KPI Packs also are available.
- Gartner Measurement’s benchmarking database provides performance data gathered from hundreds of client engagements and is updated periodically. Data are aligned to the recommended contact center KPIs.
- A benchmarking consulting service from Gartner Measurement, leveraging their deep industry expertise to help companies identify, customize, and implement the appropriate KPIs for their particular market segment.

These benchmarking offerings are available through your Blue Pumpkin representative or directly from Gartner Measurement, a division of Gartner, Inc.

ABOUT BLUE PUMPKIN

Blue Pumpkin provides industry-leading workforce optimization solutions that improve the performance of a customer contact center’s most important and valuable asset—its people. Addressing critical business challenges and creating competitive advantage with both innovative technology and best-practices professional services, we help our customers balance and optimize three critical and often competing priorities: business growth through customer loyalty, employee satisfaction and retention, and operating costs. Blue Pumpkin solutions deliver proven value to more than 1,000 organizations worldwide such as ADP, AT&T, DirectTV, eBay, JetBlue Airways, Toyota, and Visa.



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