

COPC Customer Experience (CX) Standard for Customer Operations

Suitable for Customer Service Providers (CSPs)

RELEASE 7.0
VERSION 1.2



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Executive Summary

The COPC Customer Experience (CX) Standard for Customer Operations is a rigorous management system and quality management framework for CX operations. Originally designed for contact centers, the Standard now covers all the channels used by customers to interact with CX operations throughout a service journey. The Standard is adopted and used by buyers of CX operations and support services to optimize the procurement and management of these services. Buyers often require providers get certified to the COPC CX Standard for Contact Centers to drive proven levels of high performance. Buyers certify to the COPC CX Standard for Vendor Management Organizations (VMOs) to strengthen their organization and hold themselves accountable for high performance vendor management.

Service Providers leverage the Standard as their management system for a high-performance organization. Use of the Standard facilitates a faster path to sustainable high performance and is accompanied by recognition of achievement in the market. Certification is challenging and requires a commitment to high performance but yields great rewards driving up customer satisfaction, efficiency, and revenue. To support success, COPC Inc. provides a variety of trainings designed to enable team members to build an organization capable of COPC Certification, high performance, and ongoing performance improvement.

Adoption of the COPC CX Standard fundamentally improves an organization's approach to high performance and creates a systematic and lasting ability to drive continuous improvement even for those not seeking certification.



Introduction

COPC Customer Experience (CX) Standard for Customer Operations is a performance management system for setting a CX vision, developing best-practice based strategies to achieve that vision, and managing customer experience operations to peak performance. It offers a set of management practices and key measurements for operations that are involved in managing the customer experience through a single channel or across multiple channels during the service journey that customers undertake to resolve their issues.

The mission of every Customer Experience (CX) operation is simple — to fulfill the needs of customers quickly, cost effectively, and with as little customer effort as possible. The path customers take to resolve an issue, as well as the experiences they have along the way, is known as the service journey. It differs from what many know as the customer journey as it applies to customer-facing activities and non-customer-facing activities that impact the customer experience and outcome. The service journey includes all the steps and communication methods a customer uses, and the tools and logistics a business or contact center employs to complete the service process. For operations, this helps promote greater efficiency, improved performance, and reduced cost. For customers, this means reduced effort, improved satisfaction, and enhanced loyalty.

With a focus on contact center operations, Release 7.0 of the COPC CX Standard for Contact Centers requirements have been updated to expand upon the customers service journeys, digital assisted channels, and employee experience.

The COPC CX Standard for Customer Operations is designed to:

- Provide users a management system and quality management framework with proven processes to design, evaluate and manage multichannel CX operations.
- Improve the customer experience through better insights into customers' requirements and expectations and through alignment of systems, processes, and technology to meet these expectations.
- Increase revenue (for operations that are revenue-driven).
- Reduce the cost of providing excellent service.

Companies that successfully implement the COPC CX Standard for Customer Operations will significantly improve the customer experience and increase sales while lowering costs. COPC Inc. offers training that will provide company staff the knowledge and capabilities to design, manage and maintain a high performance CX operation.

Key Terms and Relationships

One of the advantages of a globally accepted performance management system and set of standards is the establishment of a consistent “industry vocabulary.”

The COPC CX Standards are based on key terminology and relationships specific to managing customer experience operations. The list below defines the most commonly used terms within the COPC CX Standards. Understanding these foundational terms and relationships ensures consistent and relevant use of the COPC CX Standards. Additional terms and definitions are included in the glossary of terms at the end of this document.

The COPC CX Standards are based on the following terminology and relationships:

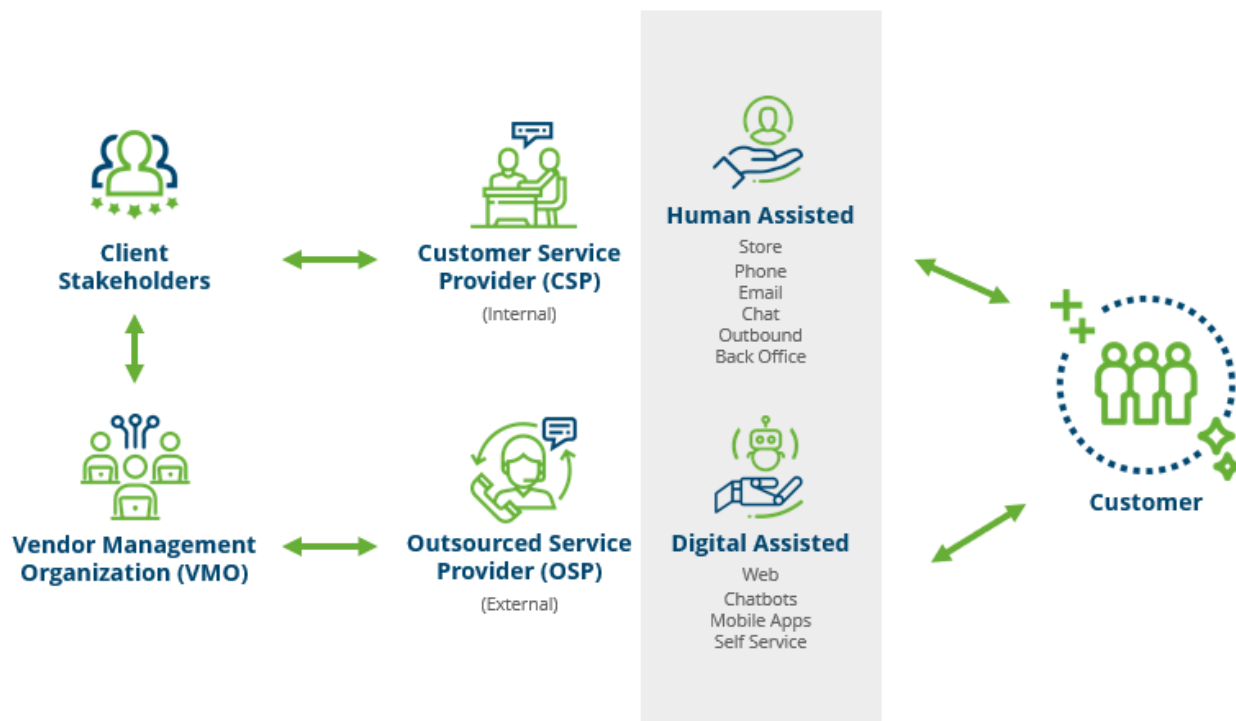


Figure 1. This diagram depicts how service is ultimately provided to an end user, or customer, the organizations involved, and the channels through which service is provided. Below are descriptions of each.

Customer Service Provider (CSP)

CSPs provide services to customers on behalf of internal Clients who are part of the same organization. CSPs encompass most, if not all, types of service environments.

Outsource Service Provider (OSP)

OSPs are third parties that are contracted by Clients to provide services to customers on their behalf. Like CSPs, OSPs encompass many types of service environments.

Clients

Clients may be the companies that hire OSPs to provide products and services to their customers. Clients may also be defined as the groups within companies that obtain services from one or more “sister” groups, divisions, departments, or teams within the same company.

Customers

Customers are the end users of an organization's products or services. Customers may be consumers, businesses, field organizations, or the retailers, distributors, and specialists that encompass a distribution channel.

Service Journey

The path taken by a customer end to end, interacting with any combination of company human and digital assisted contact points and resources required to resolve a customer request or need.

Vendor Management Organizations (VMOs)

VMOs are organizational units or groups of individuals within a company, typically within the Client company, responsible for managing at least a portion of the company's customer experience programs. Typically, VMOs manage OSPs, but may also manage CSPs, shared services such as Workforce Management.

Digital Assisted Channels

Digital assisted channels are contact points where customers direct their service transactions without interaction with a Customer Service/Support Staff representative (CSS). These channels are also referred to as digital channels. Examples include self-service solutions such as web-based services, self-service by specific systems such as in-location systems, phone-based systems, or digital applications.

Human Assisted Channels

Human assisted channels are those in which the service is provided by a Customer Service/ Support Staff (CSS) representative who helps the customer. Service is typically provided through phone, email, chat, social media, or in-location staff.

Additional terms used in the COPC CX Standard are defined in the Glossary.



Objectives and Uses of the COPC Customer Experience (CX) Standard for Customer Operations

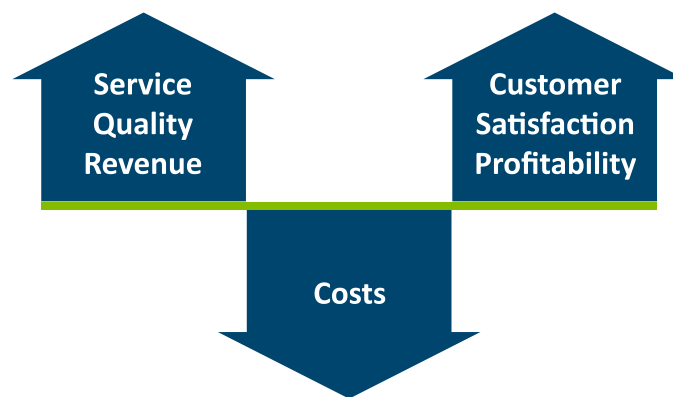
The COPC CX Standard is used by leading companies globally.

The reasons for this high level of global adoption and use include:

- It works! Users of the COPC CX Standard have improved the customer experience and revenue, increased service and quality, and reduced costs.
- By expanding the COPC CX Standard to all customer contact channels, Release 7.0 provides all types of customer experience operations the necessary tools to improve the customer experience while increasing revenue and containing cost.
- For organizations providing multichannel customer service, the COPC CX Standard provides a structure to coordinate and bring uniformity across channels to give customers a consistent experience as they navigate their service journey to a successful resolution.

Improving Service, Quality, Revenue, Customer Experience, and Profitability

The underlying objective and power of the COPC CX Standard is demonstrated in that customer experience and revenue can be enhanced while improving service and quality and decreasing cost. Hundreds of companies around the world have achieved this by implementing the COPC CX Standard within their customer experience operations.



Each of these can be defined as:

- **Service** is, from the customer's perspective, how easy it is to resolve an issue and the speed with which actions are performed. This might be how easy it is to use a self-help system, how long it takes to reach a live CSS, or the time it takes to receive a response to an email.
- **Quality** is about the accuracy of the information given to the customer by a CSS or a self-service tool. It is about handling transactions correctly the first time. Examples: giving the correct answer to an inquiry, entering an order correctly, or resolving the customer's issue in their first channel of choice.
- **Revenue generation** is optimized through better designed sales processes and systems, higher skilled staff, and products/services that provide value to clients and customers.

- **Cost** typically focuses on efficiency and the cost per unit incurred by the CSP to provide a product or service. In a multichannel environment, this involves combining the cost to support customers across all channels. Typically, high operating costs are associated with human assisted channels, while high capital costs are associated with digital assisted channels. Blending these will show if migrating customer support from human assisted to digital assisted channels genuinely results in reduced cost per unit.

Cost is different from price. Price represents what a CSP might charge for its services, or the cost burden transferred to the parent corporation.

What Types of CSPs Use the COPC CX Standard?

CSPs that use the COPC CX Standard may include any combination of these types.

Inbound [IB] and Outbound [OB] Customer Contact Operations:

These operations are often referred to as “call” centers. However, most of these customer contact operations interact with customers via phone, digital means (e.g., email, web, chat, SMS, social media, video), or traditional mail. Typical services provided include customer service, technical support [Tech], reservations, operator services, sales, fulfillment, and others.

Business Process Outsourcing (BPO) Operations:

These operations typically process large volumes of transactions that may or may not directly touch customers. They include new account set-up and activation, records management, claims processing, redemption, and other similar functions.

Retail Stores and Other Locations (Face to Face)

These operations provide service and support to customers who come to a physical location for service. Examples include retail stores, walk-in support or billing service, banks, medical centers, or assistance centers.

Field Service Operations:

These include operations that dispatch service technicians to customer locations, typically to perform installations or repairs or deliver products.

Digital Assisted Service Providers:

These operations are responsible for delivering customer service through digital assisted channels such as online services, mobile apps, self-help kiosks, and chatbots.



About the COPC Customer Experience (CX) Standard for Customer Operations

Background

The original COPC CX Standard (formerly known as the COPC CSP Standard) was developed in 1996 by buyers, providers, and senior managers responsible for operational management of customer-centric service operations. Not satisfied with the performance of existing operations and the lack of commonly known and understood operational guidelines, these individuals worked together to fill the void and move the industry forward. Among the development team were:

- Leading technology companies that outsource and operate customer contact operations that provide sales, customer service, order management, technical support, and other functions (i.e., Microsoft, Compaq, Intel, Novell, and Dell).
- Companies known for their excellent service provided by their own internally managed customer contact operations in the areas of sales, customer service, distribution/fulfillment operations, payment processing, and other services (i.e., American Express, L.L. Bean, and Motorola).
- Individuals with extensive experience in operations management and performance improvement. This experience included a Judge for the Malcolm Baldrige National Quality Award and senior management from firms in both the contact center and manufacturing industries who had achieved ISO certification for their firms.

The development team used the criteria and systems of the Malcolm Baldrige National Quality Award in the United States as the foundation for the original COPC CX Standard. To meet the unique needs of the CSP industry, the team then adapted the Baldrige criteria to accommodate the practical realities by:

- Emphasizing or adding processes, measures, and results most important to CSPs, their Clients and Customers.
- Excluding portions of the criteria that, based on CSP and Client experience, did not readily contribute to the goals of the COPC CX Standard.
- Including from other worldwide standards those components that better addressed practical performance improvement approaches.
- Structuring the COPC CX Standard to encompass not only high-performance approaches, but also the extent of the deployment of these approaches within the organization. Well-designed approaches that are pervasively deployed will lead to sustained high levels of performance.
 - **Approaches** are the processes, practices, and procedures used to meet the requirements of the COPC CX Standard.
 - **Deployment** refers to how extensively these approaches are used throughout the CSP or OSP organization.

There are three versions of the COPC CX Standard, each endorsed by the Standards Committee:

- The **COPC CX Standard for Customer Operations** is the comprehensive performance management system for CSPs that is focused on achieving high levels of performance for all kinds of service journeys customers use to get their issues resolved. The COPC CX Standard for Customer Operations is a proven framework CSPs use to balance business outcomes across the many service

journeys used that include human and digital assisted customer-facing and non-customer-facing channels and services. The COPC CX Standard for Customer Operations is an effective management system that contributes to achieving high levels of performance across the service journey including human and digital assisted customer-facing and non-customer-facing channels and services.

- The ***COPC CX Standard for Contact Centers*** is the comprehensive performance management system for 3rd party contact center outsource service providers and can be used by internal contact center organizations. The Items in the COPC CX Standard for Contact Centers reflect those areas the COPC Standards Committee (see *The COPC Standards Committee*) believes, and verified through an industry survey, contribute most significantly to achieving high levels of performance. The objectives of the COPC CX Standard for Contact Centers are to:
 - Provide high-performing OSPs with a level of recognition that will distinguish them as among the best in the world.
 - Provide the industry with a model to use to drive high performance.
- The ***COPC CX Standard for Vendor Management Organizations (VMOs)*** is the comprehensive performance management system for VMOs that is endorsed by the COPC Standards Committee. In 2002, the COPC Standards Committee determined that the ability of CSPs and OSPs to achieve high levels of performance was limited by the performance of their (internal and external) clients on mission-critical deliverables such as forecasts and product/process-related training. To address this gap, the COPC Standards Committee developed the COPC CX Standard for VMOs, which defines the key processes a VMO must perform and the related metrics a VMO must measure and manage to ensure high levels of VMO and OSP performance.

Each of these versions of the COPC CX Standard are available on COPC Inc.'s web site: (www.copc.com).

Release 7.0 of the COPC CX Standard is a major revision reflecting the continued and substantial impact of digital technologies in servicing customers and the necessity and ability to measure and manage the complete service journey for an optimized customer experience. COPC Inc.'s performance management system is applied to all types of customer contact operations, including both human and digital assisted channels. This marks the COPC CX Standards continued evolution to meet the dynamic needs of the customer contact industry. As has been the practice since the COPC CX Standard was first developed, revisions are only made by the COPC Standards Committee.



The COPC® Standards Committee

The COPC CX Standard and related certification processes are governed by the COPC Standards Committee. This independent group is comprised of individuals who have senior management responsibility at their organizations and are deeply knowledgeable of the COPC CX Standard through direct experience of using the COPC CX Standard in their operations.

The COPC Standards Committee:

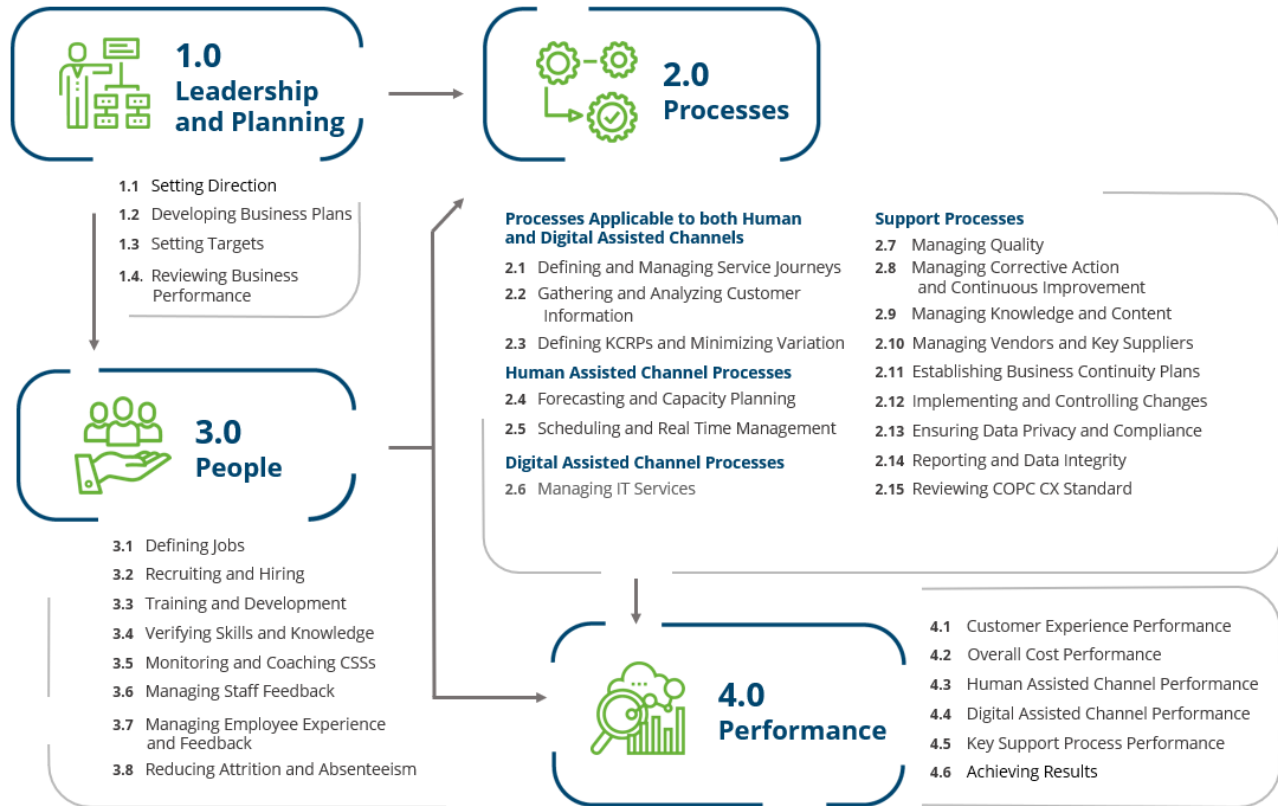
- Meets twice each year to interpret and refine the COPC CX Standard.
- Has international representation across several industries to ensure it remains a globally accepted Standard applicable across all geographies and industries.
- Receives input from users of the COPC CX Standard and changes to the criteria of the COPC CX Standard are made once a year.
- Sponsors research on industry topics to secure the necessary information to evaluate trends worthy of inclusion in the COPC CX Standard.

Overview of the COPC CX Standard

The COPC CX Standard is a comprehensive and integrated system for managing a customer centric CX operation.

- The COPC CX Standard begins with the **drivers** of customer-focused performance management embodied in the leadership characteristics and activities described in *Category 1.0 Leadership and Planning*.
- Taken together, *Category 2.0 Processes* and *Category 3.0 People* represent the organization's **enablers**: a skilled and motivated work force using well-designed technology and processes and managing these to optimal levels of performance.
- The **goal** of the system is a balanced composite of customer experience, product and service performance, and productivity addressed in *Category 4.0 Performance*.

COPC CX Standard for Customer Operations Release 7.0 Framework





Why Get Certified to the COPC CX Standard?

Underlying the COPC CX Standards is the requirement that certified Customer Service Providers (CSPs) have the operational and performance data that is required to consistently perform well on measures of service, quality, revenue, cost, and customer satisfaction throughout the service journey that customers undertake to resolve their issues. Companies certified to the COPC CX Standard must have:

- Objective measures in place for all activities that directly impact customers and clients.
- A demonstrated capability to achieve a majority of their performance targets.
- Performance improvement methodologies that have been demonstrated to produce results.
- A system that allows Enterprise and customer contact operations management to verify that the operation is actively monitoring and managing the system over time to improve performance.

The COPC CX Standards describe performance management approaches that a CSP must institute and defines the metrics used to evaluate the effectiveness and efficiency of its approaches. ***They are sustainable performance management systems for CSPs.*** The COPC CX Standard links a CSP's customer-centered performance objectives with its operational processes and the people who manage and maintain them. The objectives, processes, and people are in turn linked to the statement of direction and plans that propel and sustain them. This integration ensures that customer focus and efficiency drive performance, behavior, and direction. ***Enterprise and Customer-driven excellence and efficiency are the desired end-states for all CSPs that adopt the COPC CX Standard as a performance management and improvement system.***

Many CSPs seek to institute these practices and track these measures to become *compliant with* the requirements of the COPC CX Standard. This compliance is assessed and verified during the COPC CX Standard certification process, which requires a comprehensive audit by COPC Inc. or its licensees or Implementation Partners. ***Certified compliance with the COPC CX Standard is a major near-term objective for many companies that use this document.***

Some VMOs require their OSPs to seek certification to the COPC CX Standard to ensure consistent high-performance approaches and results.

Once certified COPC Inc. and the COPC Standards Committee recognizes success. Certified entities are added to the COPC Inc. website noting certification attainment with a description of the certified entity. COPC Inc. shares across major news wires the success of the entity with congratulations from COPC Inc. and the COPC Standards Committee. The entity also receives a physical trophy and digital badge to commemorate and share the achievement.

Quantifying Savings Gained Through the use of the COPC Customer Experience (CX) Standard

Implementing the concepts and the principles embodied in the COPC Standards has enabled many companies to achieve significant reductions in cost of operations; improvement in revenue or collections or both.

This section is intended to provide a guide to help users quantify savings or gains in revenue or collections; it identifies where common opportunities lie and the financial benefits of implementing the COPC CX Standard as a performance management system.

Savings

Improvements in Quality

- **Increase in Issue Resolution / First Contact Resolution (FCR):** Solving problems and issues more frequently during the first contact, will lead to less repeat transactions and therefore into a reduced requirement for CSSs or other operatives.
- **Cost of Poor Quality:** There is often a cost of getting things wrong, which can be measured through calculating the cost of what we do to compensate customers that have had a bad experience with the customer contact operation, the cost of rework to fix the issue and of having to handle repeat interactions. Examples include giving the customer extra time on their subscription, giving free store vouchers, free product, direct financial compensation, expedited delivery (at a higher cost to the CSP), removal of handling charges. Poor quality increases the cost of doing business, thus lowering profit margins. Poor quality also increases customer effort (i.e., as they seek resolution or remediation), which has been shown to negatively impact customer loyalty.

Improvements in Efficiency

- **Average Handle Time (AHT):** By decreasing the average handle time of transactions the CSP has the opportunity to reduce staffing and realize headcount savings. Savings are typically made either through reducing variation by managing CSSs who are outliers or streamlining the process to improve the process's capability to perform.
- **Occupancy:** Improvements in occupancy are made by better scheduling staff and reducing the amount of non-productive ready time. Occupancy gains result when the customer contact operation is either doing more work with the same number of CSSs or has reduced the number of CSSs required to do the existing workload.
- **Utilization:** Minimizing the amount of CSS work time where they are not ready to handle transactions reduces the number of CSSs that are needed. This is managed by the floor management team.
- **Autonomous Handle Rate:** Increasing the percentage of customer interactions where a digital assisted system can completely handle the transaction, end to end, without any human intervention. Well-designed digital assisted systems can provide highly efficient and accurate customer service at a lower cost than human assisted support.
- **Cost per transaction:** When measuring the overall effects of efficiency gains as detailed above, these will drive reduction in the cost per transaction.



- **Introduction of digital assisted channels:** effective use of self-service and other lower cost digital system technologies.

Improvements in Service

- **Faster Service Speed:** Delivering great service in an efficient manner is the product of many factors, including but not limited to better capacity planning models, well-designed and maintained digital assisted systems, and competent CSSs.
- **Reduction in Backlog:** By better meeting speed of response targets for deferred transactions, backlogs are reduced and therefore the number of transactions that are received by eliminating repeat contacts.
- **Reduction in Client Penalty Payments:** OSPs can minimize penalties and maximize bonus payments by consistently meeting contractual commitments amongst which may be Service Level targets.

Reduction in Transaction Volume

Reduction in human assisted volumes handled by the customer contact operation will have a significant impact on CSS numbers and therefore generate savings.

Reduction in volume can be achieved by:

- Increased Issue and first contact resolution
- Reduction in Backlogs
- Identify and fix causes of contacts
- Provide customers alternate methods of resolving problems, e.g., self-service options on IVR, mobile apps, websites, and kiosks.
- Automating contacts (self-service options on IVR)

The Importance of Employee Engagement

Attracting and maintaining a highly engaged workforce has a large impact on an entity's ability to meet its service, quality, cost, revenue, and satisfaction goals.

As personnel costs account for approximately 70-80% of the total operational costs in a CSP or OSP environment, changes in employee engagement levels can have a significant impact on the financial performance of an entity.

Two of the most common ways of measuring the direct cost savings brought about as a result of improving employee engagement are focused on reducing absenteeism and increasing employee retention (reducing attrition).

Calculating the Cost Savings from improvements in Attrition and Absenteeism

In addition to being affected by employee engagement, attrition is also very often impacted by the implementation of poorly designed processes for recruitment and hiring. COPC Inc. finds that the implementation of robust recruitment processes, which properly define the recruitment profile for CSSs based on an analysis of good and bad hires, is a very effective way of reducing attrition.

- **Attrition:** By calculating the cost of replacing CSSs, it is possible to estimate the impact of the cost of attrition on the organization. Cost factors will include:
 - *Salary costs during training:* Salary costs paid to CSSs during new hire training includes salary plus benefits and fringe costs but not fixed costs such as workstations, etc.
 - *Direct recruitment costs:* An agency's cost or internal costs specifically spent on recruitment – excluding fixed costs.
 - *Cost of overtime:* Backfilling leavers until new recruits are operational.
 - *Reduced productivity of new hires:* New hires tend to have poorer average handle times than tenured staff. In a typical customer contact operation with a medium call length program, COPC Inc. finds that it can take up to 7 weeks from the end of training for a new hire to reach the efficiency of existing CSSs.
 - *Direct costs of training:* Materials, additional equipment, hires, directly attributable costs – excluding fixed costs.
 - *For OSPs paid by Full Time Equivalent (FTE):* There is a revenue impact to consider when calculating the cost of attrition.
 - *Fixed Costs:* It is debatable whether costs of overhead such as recruiting and training departments, training facilities, etc. should be included in the cost per attrit. COPC Inc. normally does not include these in the calculation of savings, as often reducing attrition does not have as much impact on these departments as the cost per leaver calculation implies, as costs will reduce by steps rather than by attrit. If they are to be included, it is better to forecast annual attrition and spread the fixed costs over the total number of expected leavers in a year to derive the burdened cost per leaver.
- **Absenteeism:** The CSS headcount should be increased to allow for absent CSSs for the CSP to properly staff to arrival patterns. For every % of absenteeism for whatever reason that is included in the capacity plan the number of CSSs employed will increase by that %. This does not just include sickness; this will also include vacation, training, holidays, personal time off, maternity leave (paid for), and other types of absence. The calculation of the impact of absenteeism will include:
 - *Direct salary costs:* Additional CSSs recruited to cover absence.
 - *Overtime:* Paid to existing CSSs.

The impacts of Attrition or Absenteeism on Service Level, Revenue, First Contact Resolution, or other resulting costs associated with poor performance are not included in the Costs of Attrition or Absenteeism for savings purposes, as savings made will be calculated in those specific performance areas and including them in Attrition or Absenteeism will lead to double counting of savings.

Calculating the Monetary Value of Savings

It is recommended that savings calculations are:

- Conservative rather than exaggerated
- Turned into monetary amounts
- Expressed as annual savings
- Differentiated between one time and on-going savings
- Backed up by data



- Accounting for capital costs (when introducing digital assisted channels)
- Are not double counted

Typically, savings will either be directly quantifiable, or will be expressed as Full Time Equivalent (FTE) head count savings.

- **Headcount Reduction:** Most commonly in customer contact operations, savings will be measured in reduced FTEs, or reduced paid hours. To make it real to the organization it is imperative to turn savings into monetary amounts. *For example, the significance of a 5% gain in FCR in a 500-seat program is hidden unless this is translated into 5% less call volume, or 25 less CSSs required or \$500,000 potential annual savings (assuming a CSS costs \$20,000 per annum)*
- When calculating actual head count savings, these need to be offset against increases or decreases in volumes (not attributable to the project), other work taken on, or other changes to the operation.
- **Direct Attributable Savings:** These also need to be turned into a monetary value, so that the organization can truly perceive the impact of the change. A 10% reduction in Critical Errors, for example, could be turned into a 10% reduction in the goodwill paid to customers when errors are made.

Gains in Revenue and Other Benefits to the Organization

Implementing the COPC Standards will also impact other results areas of the customer operation apart from savings. Where the operation is involved in revenue generation, lead generation, or retention there will be a directly attributable financial gain through performance improvements. There are other areas where improving performance will have benefits which are difficult to turn into direct financial gains; these intangible benefits will include improvements in Customer Satisfaction, identification of areas of the organization external to the customer experience operation that are poorly performing.

Direct Performance Gains

Sales: Improvement in performance of Service (by reduction in abandon rate), Quality (reducing cancellations), and Efficiency (improving availability) will all drive improvement in sales performance.

The best measure of this is improvement in net sales revenue, which directly or indirectly would result from the improved performance. It is best to translate the number of sales units into revenue using an average sales value or in the case of a subscription to the annual revenue produced.

- If the customer operation is selling or collecting this can be measured in the \$ value of the improved performance.
- If the customer operation is generating leads, then this needs to be turned into a revenue figure by using a conversion factor and average sale value.
- For retention, the revenue saved is calculated as the expected annual spend of the saved customer. (Often, a save is only counted as a save if the customer is still a customer after 90 days)

Intangible Benefits

Loyalty/ Increased Satisfaction and Churn/ Decreased Dissatisfaction: It is usually hard to put a numerical figure on the financial benefit from improvements in Customer Satisfaction and Dissatisfaction with the service provided by the customer contact operation.

Identification of Other problem areas in the Organization: By analyzing the reasons customers contact the operation, it is possible to identify where failures are happening in the supply and provision of services and products elsewhere in the organization. While this can be used to reduce transactional volume and therefore costs in the customer operation; these improvements can also have much greater benefits to the organization as a whole.



Looking Forward: Strategic Direction

The COPC Standards Committee decided that all the COPC Standards will be synchronously updated annually, and that they will share the same release numbering to make it easier for CSPs to make sure they are working to the same requirements.

- **The COPC CX Standard will change periodically to reflect the evolution of the industry.** The customer operations industry is evolving rapidly and the COPC CX Standard will reflect these developments and maintain their status as the global definition of “state of the art” practices and performance. Changes to the COPC CX Standard will be announced by the COPC Standards Committee as the changes are approved and incorporated.
- Change types:
 - Maintenance changes: These include interpretations and clarifications.
 - Modifications to reflect changing conditions and industry needs. These changes will continue to increase both the reach (e.g., adoption rate) and rigor (e.g., being a true operational and financial differentiator) of the COPC CX Standard and keep the COPC CX Standard as the global definition of “state of the art” practices and performance measures.

1.0 Leadership and Planning (400 Points)

The long-term success of an organization depends on its leaders' ability to set direction and ensure the operational practices support effective performance. Category 1.0 focuses on how the CSP provides appropriate leadership and how doing so helps the CSP achieve its objectives. It also focuses on the management of the Category 4.0 Performance results.

1.1 Setting Direction (100 Points)

Setting a statement of direction clarifies the organization's commitment to customers and employees and aligns the behavior and actions of everyone in the organization with those necessary to attain the organization's goals.

1. The CSP must have a documented statement of overall direction (e.g., vision, mission, or purpose) that clarifies its commitment to customers and employees.
2. The CSP must ensure management and employee behavior are aligned with the statement of direction.

1.2 Developing Business Plans (100 Points)

Business plans define actions to meet operational objectives which support the statement of direction.

1. The CSP's process for developing its Annual Entity and Department Business Plans must:
 - a. Incorporate an analysis of key factors that would influence the plan.
 - b. Ensure plans consistently support each other and are understood by the appropriate individuals.
2. Business plans must be documented and include quantified financial and non-financial objectives, actions, milestones, and who is responsible for implementation.



1.3 Setting Targets (100 Points)

By setting high performance targets, an organization establishes goals for each objective leading to performance excellence and continuous improvement.

1. The CSP must have an approach for setting targets for all required metrics listed in Exhibits 1, 2 and 3 that ensures high performance and continuous improvement.
2. For all required metrics, targets must be clearly identified.
3. Targets must be set at high performance levels unless these are in conflict with the entity's statement of direction.
4. Targets must be reviewed annually, and where performance is routinely better than target and continuous improvement would improve the customer experience or financial results, the targets must be improved.

1.4 Reviewing Business Performance (100 Points)

Regular reviews of performance to business plans and targets informs the organization on whether objectives are being met, which metrics are performing at targeted levels, and where actions are required to improve performance.

1. The CSP must use a documented approach for reviewing performance to business plans and performance to targets.
2. Targets and performance must be **known** by the appropriate personnel.
3. The approach for reviewing performance must:
 - a. Include formal quarterly analysis of performance to business plans.
 - b. Lead to **actions** where results are below targets.
 - c. Demonstrate sustained improvement from actions taken.

2.0 Processes (1000 Points)

Superior performance is derived from the CSP's ability to efficiently provide customers with optimized service journeys that meet their expectations. Category 2.0 Processes focuses on the Key Customer-Related Processes (KCRPs) and Key Support Processes (KSPs) CSPs use to develop and deliver these service journeys. It also focuses on the mechanisms the CSP uses to quantitatively evaluate, maintain, and improve their service journeys to ensure they are effective and efficient.

2.1 Defining and Managing Service Journeys (100 Points)

Clearly defining and managing the service journeys that customers undertake to satisfy requests ensures these service journeys meet customer expectations.

1. The structured approach must:
 - a. Identify those service journeys that have the highest potential impact on the CSP, client, or customer.
 - b. Ensure, for service journeys involving more than one channel, the customer experience is consistent across channels, unless there is a business reason for this differentiation.
 - c. Relevant customer information and data must be consistent and available through all channels.
 - d. The results from the same process carried out in each channel must be consistent and predictable.
2. The CSP must:
 - a. Identify failures in the service journey, product design, or other drivers that lead to unintended customer contacts.
 - b. At least annually, determine which service journeys can be optimized through automation, elimination, simplification, improvement.



2.2 Gathering and Analyzing Customer Information (100 Points)

Capturing, evaluating, and taking appropriate action on information obtained from customers provides the organization with the customer insights needed to improve the customer experience.

1. The CSP must ensure a structured approach is used to improve its service journeys by capturing, evaluating, and taking appropriate action on information obtained from customers. The structured approach must:
 - a. Gather feedback from customers about the enterprise's products, services, support and service policies, processes, and procedures from any part of the service journey or any aspects of customer handling from any channel available to customers.
 - b. Identify reasons why customers contact the CSP.
2. Satisfaction with the customer experience must be measured for each service journey (identified in 2.1.1) and channel.
 - a. For the service journey, the CSP must measure and manage the customer's overall experience with the service journey. The experience with the service journey must be measured at least monthly and analyzed at least quarterly.
 - b. For the channel, at the program level, the CSP must measure and manage overall satisfaction and dissatisfaction with the customer experience associated with the transaction.
 - i. Satisfaction with each of the attributes that drive the measure of the overall customer experience.
 - ii. The experience with the channel must be measured and analyzed at least monthly.
3. The information gathered must be aggregated and analyzed and the CSP must quantify and understand the relative importance of the factors that have a significant impact on satisfaction with the customer experience and business outcomes.

2.3 Defining Key Customer Related Processes and Minimizing Variation (100 Points)

Defining the KCRPs and using a structured approach that minimizes variation leads to more consistent processes and improved customer experiences.

1. Each KCRP must include clear procedures that have a high probability of achieving customer and Enterprise requirements, targets, or specification limits.
2. For human assisted channels, the CSP must have an approach that ensures the procedures for each KCRP are performed as intended and in a consistent manner across all shifts and work teams, i.e., the CSP must minimize variation.
3. For those human assisted KCRPs where there is high variation, the CSP must demonstrate it can improve process performance, in part, by using the continuous improvement process described in Item 2.8 *Managing Corrective Action and Continuous Improvement*. As part of this improvement process, the CSP must:
 - a. Manage variation between CSSs performing the same process.
 - b. Determine if changes are required to improve the process.
4. The CSP must formally audit its human and digital assisted KCRPs after a significant change or at least annually.



2.4 Forecasting and Capacity Planning (80 Points)

A capacity plan based upon forecasts for transaction volumes, handle times, and shrinkage ensures the organization has sufficient resources to meet demand.

1. **Forecasting** – For the Capacity Plan and Scheduling Plan, the CSP must understand its historical volume, transaction handle time, and shrinkage and must develop forecasts for each of these for all types of human assisted channel transactions (e.g., calls, emails, chat, footfall (retail), social media).
 - a. The CSP must measure and manage all forecast accuracy metrics required in Exhibit 2.
2. **Capacity Planning** - The CSP must develop a capacity plan(s) (using the appropriate demand requirement calculations, by channel, considering the type of transactions) to determine the number of staff required to handle the predicted number of transactions.
 - a. The plan must be created sufficiently far in advance to allow for the time needed to recruit and train new staff.
 - b. The model must incorporate the target service level or cycle time and forecasts from 2.4.1 for:
 - i. Transactional volume
 - ii. Transaction handle time
 - iii. Shrinkage
 - c. Capacity plans must be produced using weekly or daily data.

2.5 Scheduling and Real Time Management (80 Points)

Scheduling staff to meet expected human assisted channel transaction volumes and effective real time management ensures sufficient staff availability to achieve business objectives.

1. **Scheduling** - The CSP's scheduling approach must:
 - a. Calculate the number of staff required at the relevant interval (by using the appropriate demand requirement calculation(s) for the type(s) of transaction(s) being handled).
 - b. Create a schedule that considers both its Service Level and Efficiency/Cost targets by minimizing the variation between the number of staff required and the number of staff available in each interval.
 - c. Incorporate service level or cycle time targets and forecasts for:
 - i. Volume
 - ii. Handle Time
 - iii. Shrinkage
 - d. Be based on appropriate intervals for the targeted cycle time.
 - e. Periodically review scheduling and work practices to identify those that are limiting its ability to staff to forecasted demand requirements.
 - f. Change the scheduling and work practices to minimize the variation between forecasted demand requirements and staff availability.
2. **Real Time Management** - The CSP must use a structured approach for:
 - a. Taking actions during the day when actual performance is significantly different from the assumptions used to create the forecast and/or schedule.
 - b. Re-planning staffing and scheduling for the near-term when the plan is inconsistent with the inputs used to create the original schedule.
 - c. Managing adherence (supply) at the interval level.
 - d. Measuring and managing all metrics for real time management required in Exhibit 2.
3. **Allocating Transactions** - The CSP must:
 - a. Use a documented structured approach for allocating transactions.
 - b. Where the CSP is managing a shared-queue environment, monitor overall network and site-level performance on a real-time basis.



2.6 Managing IT Services (80 Points)

Organizations design, maintain and continuously improve customer-facing digital systems to deliver high levels of customer expectations while meeting business objectives.

1. The CSP's IT service management for customer-facing and customer support digital assisted systems must incorporate the following processes:
 - a. Strategy and Planning processes, including but not limited to planning and alignment with business strategy, budgeting, service portfolio, and governance.
 - b. Design, develop and control processes, including but not limited to requirements gathering, design, development, project management, test, release, and transitional support.
 - c. Delivery processes, including but not limited to provision, availability, reporting, performance, capacity, security, and continuity.
 - d. Resolution processes for incident and problem management.
 - e. Relationship processes, such as business relationship and supplier management (using the approaches detailed in Item 2.10 *Managing Vendors and Key Suppliers*).
 - f. Continuous improvement processes that incorporate customer and business feedback.
2. All technology or systems intended for customer use must be designed to enhance customer interactions.
 - a. Systems must enable seamless transfer of unanswered questions and unresolved issues to a CSS for handling (if a human assisted channel exists).
 - b. The CSP must ensure all autonomous decisions made by any systems are accessible for review.
3. The CSP or its key suppliers must measure all the service management metrics in Exhibit 2.

2.7 Managing Quality (80 Points)

An effective quality management approach reduces errors and improves consistency leading to high levels of first contact resolution and customer experience at lower cost.

1. The quality management approach must enable the CSP to measure the accuracy or defect rate performance of a human or digital assisted program. This approach must ensure that:
 - a. The number of monthly interactions to be monitored or checked for each program is based on an understanding of the statistical implications of the sample size.
 - b. The methodology used to select the sample of interactions to be monitored or checked is unbiased.
 - c. For customer-facing processes, Customer Critical Error Accuracy, Business Critical Error Accuracy, and Compliance Critical Error Accuracy must be monitored or checked and assessed as distinct components of human assisted transactions.
 - i. Defect Rate must be measured for digital assisted transactions.
2. The CSP must have an approach for analyzing quality results to understand and identify frequent errors and their causes.
3. The CSP's quality management approach must ensure that individuals performing monitoring or systems used for quality assurance checks are effective and calibrated to ensure consistency.



2.8 Managing Corrective Action and Continuous Improvement (80 Points)

High Performing organizations that use an effective problem-solving methodology to identify and resolve the root cause(s) of poor performance take actions that improve results.

1. The CSP must use a structured problem-solving approach to process improvement that:
 - a. Defines the problem.
 - b. Analyzes data to determine causes.
 - c. Develops and implements solutions.
 - d. Monitors and evaluates results.
2. The CSP must:
 - a. Apply this methodology to any metrics directly affecting the Customer, Efficiency or Cost, Sales, and Customer Experience and Dissatisfaction metrics that are not meeting performance 3/4ths of the time periods.
 - b. Use a structured prioritization process to take actions on those improvement initiatives that have the highest potential impact on the CSP, enterprise or customer.
 - c. Be able to demonstrate that performance has improved as a result of its process improvement efforts.

2.9 Managing Knowledge and Content (60 Points)

A structured approach for managing content ensures that customers and CSP staff are provided consistent and up-to-date information across all channels to meet their needs.

1. The CSP must use a structured approach for content management to ensure content used by customers, staff, or digital systems assisting customers is current, relevant, and accurate.
2. The CSP must measure and manage the timeliness and accuracy of content management using all appropriate metrics in Exhibit 2.

2.10 Managing Vendors and Key Suppliers (40 Points)

Effective management of vendors and key suppliers ensures that key support organizations perform optimally to benefit the CSP and the customers it serves.

1. The CSP must have a documented statement (such as a contract, service level agreement, or letter) of its requirements for each vendor or key supplier.
2. The CSP must analyze the performance of each of its vendors or key suppliers quarterly. At least once every six months, the CSP must provide written performance feedback to each vendor or key supplier.
3. Corrective action plans must be developed if a vendor or key supplier's performance is found to be deficient.

2.11 Establishing Business Continuity Plans (40 Points)

High performing organizations develop a comprehensive business continuity plan to handle scenarios that will adversely affect operations so that management and staff react appropriately when these scenarios occur to minimize the disruption and get back to full operation as soon as possible to minimize impact on operations and customers.

1. The CSP must conduct a risk assessment of the potential problems that could adversely impact its provision of customer handling through each channel and develop contingency plans for those problems most likely to occur.
2. The business continuity plan must be well understood by appropriate personnel.
3. These plans must be demonstrated to be effective, either by simulation or actual occurrence, within the past twelve months.



2.12 Implementing and Controlling Changes (40 Points)

A structured approach to implementing major changes should result in a seamless customer experience and meet requirements for the organization and customers.

1. The CSP must have a structured approach to identify future changes.
2. For major changes to (and for new) products, services, programs, customer requirements or systems, the approach must:
 - a. Define new or changed requirements and targets.
 - b. Identify the impacted service journeys.
 - c. Ensure the changes are communicated to all affected parties in an effective manner.
 - d. Ensure processes are designed to meet requirements and targets.
 - e. Include a timeline for implementing requirements (e.g., installing infrastructure, programing services, developing software and data links, hiring, and training staff, and communicating with customers).
 - f. Track the timeliness of the implementation and demonstrate implementation milestones have been met.
 - g. Ensure an audit is conducted early in the implementation to ensure processes are properly controlled and expected outcomes are realized.

2.13 Ensuring Data Privacy and Compliance (40 Points)

High performing organizations establish clear procedures that ensure compliance with regulatory requirements and protect customer sensitive and proprietary data and information.

1. The CSP must have a documented compliance and privacy policy that considers any legal requirements and defines:
 - a. How compliance with international, national, state, and federal regulatory requirements will be ensured.
 - b. How customer privacy will be protected.
2. The CSP must document its procedures for enforcing compliance and protecting customer privacy.
3. The CSP must verify these procedures are implemented as designed and effectively ensure compliance and protect customer privacy.
4. During customer interactions, any violation of compliance requirements or the privacy policy by human or digital assisted channels must be considered a critical error during the monitoring/quality assurance process.

2.14 Reporting and Data Integrity (40 Points)

Organizations with appropriate and reliable data and information successfully identify the actions necessary to meet business objectives.

1. For all required metrics, the CSP must collect data and the data must be relevant, objective, accurate and representative. There must be enough data to discern trends.
2. Reports must be made available to and understood by the appropriate personnel.

2.15 Reviewing COPC CX Standard (40 Points)

A comprehensive review of the COPC CX Standard framework focusses the organization on areas that need to be addressed to achieve high levels of performance.

1. At a minimum, the COPC CX Standard review must:
 - a. Be conducted annually.
 - b. Assess compliance of both approach and deployment with all requirements of the COPC CX Standard for Customer Operations.
 - c. Yield findings that include documented evidence of “compliance” and “non-compliance” with the COPC CX Standard for Customer Operations and opportunities for improvement in both processes and performance.
2. The CSP must implement corrective actions for areas of non-compliance.



3.0 People (600 Points)

Meeting performance targets and improving performance levels requires a workforce that is appropriately skilled, knowledgeable, and motivated. Category 3.0 requires that CSPs have people management approaches that enable all staff to deliver quality products and services effectively and efficiently.

3.1 Defining Jobs (60 Points)

Clearly defining the skills and knowledge required to perform Key Customer Related (KCR) jobs leads to successful performance and motivated staff.

1. The CSP must clearly define all the skills and knowledge required to perform each Key Customer Related job.
2. The required minimum skills and knowledge to perform the job must be verifiable (see Item 3.4 *Verifying Skills and Knowledge*).

3.2 Recruiting and Hiring (80 Points)

Acquiring skilled and motivated staff increases the probability of successful performance.

1. The CSP must establish a list of minimum hiring requirements of the individuals to be hired for each KCR job.
2. The CSP's recruiting and hiring approaches must identify and successfully recruit individuals with these minimum requirements.
3. The CSP must assess the effectiveness of its recruiting process at least annually.

3.3 Training and Development (80 Points)

Providing training and development to staff performing KCR jobs results in higher probability of successful performance.

1. For staff in all KCR jobs, training must be provided for the minimum skills and knowledge required for the KCR jobs, unless staff are hired with these minimum skills and knowledge.
2. The CSP's approach to training and development must be formally defined for all KCR jobs and must define the required outcome.
3. There must be formal retraining of existing staff if skill and knowledge requirements change.
4. At least annually, the CSP must review the effectiveness of training for KCR jobs where post-training performance does not meet expectations and take actions as appropriate.



3.4 Verifying Skills and Knowledge (80 Points)

Verifying that staff in KCR jobs have the skills and knowledge required for their jobs ensures they can service customers as intended.

1. For all staff in all KCR jobs, required skills and knowledge for KCR jobs must be verified prior to allowing staff to perform the jobs.
2. The verification process for all staff in KCR jobs must ensure:
 - a. Objective performance thresholds are established.
 - b. Staff that pass the minimum performance thresholds are able to perform satisfactorily on the job.
 - c. Action plans are established for staff that fail to demonstrate the required skills and knowledge.
3. Following changes in program, procedures, systems, etc., skills and knowledge must be re-verified.

3.5 Monitoring and Coaching CSSs (80 points)

Monitoring transactions provides the quality control to ensure customer needs are met and identifies areas where coaching can lead to performance improvement.

1. The CSP must monitor transactions for all CSSs on an ongoing basis for all transaction types they handle.
2. The CSP must effectively coach and take action to improve based on monitoring results.

3.6 Managing Staff Performance (80 Points)

Evaluating individual performance to appropriate key performance indicators (KPIs) and documenting actions needed to improve, support the organization in achieving customer and business performance objectives.

1. At least quarterly, the CSPs staff performance management approach must include:
 - a. A review of individual performance relative to the objectives for KCR staff.
 - b. Identification and development of effective improvement plans for areas in which KCR staff do not consistently achieve targeted levels.
 - c. Providing effective coaching to ensure performance meets objectives.
2. The CSP must conduct a formal/comprehensive performance appraisal of each individual's performance to objectives and identify areas for improvement, at least annually.

3.7 Managing Employee Experience and Feedback (60 Points)

Feedback from employees about the employee experience and process issues provides the information needed to implement appropriate changes to improve employee commitment and business performance.

1. The CSP must proactively solicit feedback from staff at least quarterly on topics impacting customer experience and employee performance.
2. The CSP must proactively involve appropriate staff in identifying process improvement opportunities and developing recommendations.
 - a. The CSP must evaluate, analyze, and take effective action on feedback identified above that has a significant impact on customer experience and employee performance.

3.8 Reducing Attrition and Absenteeism (80 Points)

Managing CSS staff attrition and absenteeism should result in improved performance and increase the organization's ability to service customers and decrease costs.

1. The CSP must measure and manage CSS attrition and absenteeism.
 - a. Appropriate action must be taken if attrition or absenteeism results do not meet targets.
 - b. The CSP must establish targets for Attrition and Absenteeism based on an understanding of the costs of attrition and absenteeism and the impact of each on service, quality, and the customer experience; other business requirements; and labor conditions.



4.0 Performance (2000 Points)

The goal of the COPC CX Standard is to help CSPs improve the customer experience and achieve high and ever-increasing levels of product and service performance and cost efficiency. The approaches described in Item 2.8 Managing Corrective Action and Continuous Improvement and Item 2.3 Defining KCRPs and Minimizing Variation are used to drive improvement in performance metrics. All Exhibit 1, 2, and 3 metrics must be compliant with level requirements.

4.1 Customer Experience Performance (500 Points)

Managing the level of satisfaction customers have with their service journey and individual contact channels should result in more loyal customers.

1. The customer experience with the service journeys identified in 2.1.1 and each contact channel must be measured and compliant with the guidelines set out in Exhibit 3.
2. The CSP must use any customer experience metrics required by the enterprise.
3. The CSP must measure and manage all required customer experience metrics in Exhibit 3 for interactions carried out by the CSP or a vendor.

4.2 Overall Cost Performance (200 Points)

Managing the overall cost to provide service to customers across all channels should result in the provision of high levels of customer service at optimal cost.

1. The CSP must measure the overall cost of service delivery, including both human and digital assisted channels.
2. The CSP must use all overall cost management metrics in Exhibit 3 and any additional cost metrics deemed important by the enterprise.
3. Cost Management data must be analyzed at least quarterly.



4.3 Human Assisted Channel Performance (400 Points)

Managing the performance of each key customer-related process (KCRP) performed by human assisted channels supports achieving high performance levels.

1. For each Exhibit 1 KCRP that the CSP or a vendor performs, the CSP must use all the required metrics listed in Exhibit 1.
2. Exhibit 1 required metrics used by the CSP or a vendor must be compliant with the guidelines set out in Exhibit 1.
3. The CSP must use any KCRP metrics deemed important by the Enterprise.

4.4 Digital Assisted Channel Performance (350 Points)

Managing the performance of each KCRP associated with digital assisted channels supports achieving high performance levels.

1. For each KCRP for digital assisted channels that the CSP or a vendor performs, the CSP must use all the required metrics listed in Exhibit 1.
2. Exhibit 1 required metrics used by the CSP or a vendor must be compliant with the guidelines set out in Exhibit 1.
3. The CSP must use any KCRP metrics deemed important by the Enterprise.

4.5 Key Support Process (KSP) Performance (200 Points)

Managing the performance of each key support process (KSP) performed by the organization or a key supplier supports achieving high performance levels.

1. For each Exhibit 2 KSP that the CSP or a key supplier performs, the CSP must use the metrics listed in Exhibit 2.
2. Exhibit 2 KSP metrics used by the CSP or a key supplier must be compliant with the guidelines set out in Exhibit 2.
3. The CSP must use any KSP metrics deemed important by the Enterprise.

4.6 Achieving Results (350 Points)

Achieving targeted levels and exhibiting sustained improvement in a majority of the required service, quality, revenue, cost, and customer experience satisfaction metrics indicates a high performing organization.

1. The CSP must:
 - a. Meet or exceed targeted performance levels for a minimum of 50% of performance metrics, and
 - b. Meet or exceed targeted performance levels or exhibit sustained improvement in a total of 75% of performance metrics.
2. Entities involving multiple locations or services (within or across locations) must meet the requirements of 4.6.1 for each:
 - a. Location in the entity.
 - b. Service (e.g., customer service, tech support, retail, outbound, fulfillment, e-commerce, healthcare, business process outsourcing).

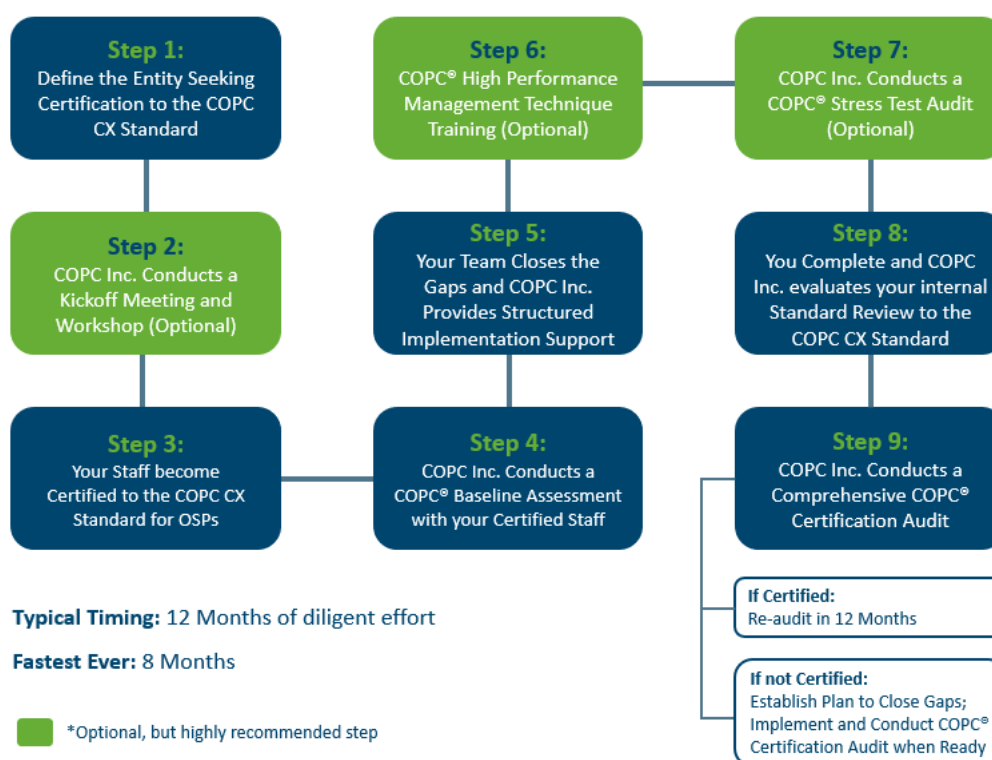


Metrics Included in Calculations for Item 4.6

To calculate whether it is compliant with the 50% and 75% requirements of this Item, the CSP must assess its performance on the required Customer Satisfaction, Service, Quality, Sales, Efficiency and Cost metrics at the levels indicated in the following table:

Item	Metrics included in Calculations for Item 4.6	
	(by level)	
	Entity	Program
4.1 Customer Experience	Service Journey Customer Experience	- Overall Customer Satisfaction - Overall Customer Dissatisfaction
4.2 Overall Cost Performance	Cost per X	
4.3 Human Assisted Channel Performance		All KCRP metrics managed at the entity or client level will be counted only once at the entity level.
4.4 Digital Assisted Channel Performance		All KCRP metrics managed at the entity or client level will be counted only once at the entity level.

COPC CX Standard Certification Process



For more details about the certification process, please refer to the **COPC Customer Experience Standard Certification Guide**.



COPC CX Standard Scoring System

The COPC CX Standard scoring system involves the following components:

Item Point Values

Each Item in the COPC CX Standard has been assigned points based on the importance of the Item. The point values can be found as you review the requirements of each Item. The score for the COPC CX Standard totals 4,000 points.

To become certified, the entity must:

- Score 95% of the available points AND
- 100% on Approach in Categories 1.0-3.0 AND
- Meet the 50%/75% requirement of Item 4.6 *Achieving Results*.

Scoring Guidelines for Individual Items

The COPC CX Standard scoring system requires different methods for scoring the Category 1.0 - 3.0 Items and the Category 4.0 Items. Both methods provide a percentage of the available points that will be awarded for the Item.

Categories 1.0 – 3.0 of the COPC CX Standard describe the various types of processes, practices, and procedures that CSPs and OSPs must develop and implement to meet the requirements of the COPC CX Standard. The COPC CX Standard encompasses not only high-performance approaches, but also the extent of the deployment of these approaches within the organization. Well-designed approaches that are pervasively deployed will lead to sustained high levels of performance, which is the goal of the COPC CX Standard.

- **Approaches** are the processes, practices, and procedures used to meet the requirements of the COPC CX Standard.
- **Deployment** refers to how extensively these approaches are used throughout the organization.

Scoring Categories 1.0 to 3.0

Items in Categories 1.0 - 3.0 are evaluated based on the Approach and the extent of Deployment, according to the following scoring guidelines:

Scoring	Approach	Deployment
0%	The approach meets less than 25% of the requirements of the Item	The approach is fully deployed in less than 25% of the Programs (or in less than 25% of the KCR jobs in Cat. 3.0)
25%	The approach meets at least 25% and less than 50% of the requirements of the Item	The approach is fully deployed in at least 25% and less than 50% of the Programs (or in at least 25% and less than 50% of the KCR jobs in Cat. 3.0)
50%	The approach meets at least 50% and less than 75% of the requirements of the Item	The approach is fully deployed in at least 50% and less than 75% of the Programs (or in at least 50% and less than 75% of the KCR jobs in Cat. 3.0)
75%	The approach meets at least 75% and less than 100% of the requirements of the Item	The approach is fully deployed in at least 75% and less than 90% of the Programs (or in at least 75% and less than 90% of the KCR jobs in Cat. 3.0)
100%	The approach meets all the requirements of the Item	The approach is fully deployed in at least 90% of the Programs (or in at least 90% of the KCR jobs in Cat. 3.0)
Note #1: The score for an individual Item is equal to the lowest score on either Approach or Deployment. Example – if a CSP scores 75% on Approach and 50% on Deployment, the Item score is 50%		

Scoring Category 4.0

Items in Category 4.0 Performance are evaluated based on Results performance, according to the following scoring approach and table of required metrics.

Scoring	Results
100%	At least 50% of the required metrics are achieving targeted levels
Note #1: A metric cannot count for "Results" if it does not meet "CUI" of CUIKA. Any requirement in Category 4.0 not met by the CSP would count as a "miss" on "C" of CUIKA.	
Scoring Items 4.1, 4.2, 4.5 – The score for an individual Item would be equal to the percentage of metrics achieving targeted levels and those showing sustained improvement. Example #1 – If a CSP achieves targeted levels in 48% of the metrics, they receive 96% of the points for that Item. For metrics showing sustained improvement, 0.5% of the points for each percentage point are awarded up to a maximum of 100% of the points for that Item. Example #2 – If a CSP achieves targeted levels in 50% or more of the required metrics, they achieve 100% of the points for that Item regardless of metrics showing sustained improvement. Example #3 – If a CSP achieves targeted levels in 0% of the metrics, they receive 0% of the points for that Item for Levels. For metrics showing sustained improvement, they are awarded 0.5% of the points for each percentage point.	
Scoring Items 4.3 and 4.4 (S, Q, R, E metrics) – The score would require each metric type to be worth 1/4 th of the points if all four metric types exist or 1/3 rd of the points if only three of the metric types exist. Use the same methodology as above but separate by metric type (S, Q, R, E). Example #1 – If a CSP achieves targeted levels in 40% of the Service metrics with no sustained improvement they receive 80% of the points, if 50% of the Quality metrics achieved targeted levels with no sustained improvement they receive 100% of the points, if 60% of the Revenue metrics achieved targeted levels with no sustained improvement they receive 100% of the points, and if 25% of the Efficiency metrics achieved targeted levels with an additional 10% showed sustained improvement they receive 55% of the points. Since metrics exist for all metric types (S, Q, R, E), each is worth 1/4 th of the available points for the Item.	
Scoring Item 4.6 – Score the 50/75 result where any 1% drop in achieving 50% would result in a 2-percentage point drop in points and any 1% drop in achieving 75% would result in a 1 1/3 rd percentage point drop in points. Example #1 – If a CSP achieves targeted levels for 48% of the metrics and achieves targeted levels or exhibits sustained improvement in 69% of the metrics they receive 96% of the points for the "50% rule" and 92% of the points for the "75% rule".	



Metrics to Include in the Calculation of Results for Category 4.0 Scoring:

Item	Description	Entity	Program
4.1	Customer Experience	Service Journey Customer Experience	- Overall Customer Satisfaction - Overall Customer Dissatisfaction
4.2	Overall Cost Performance	Cost Per X	
4.3	Human Assisted Channel Performance		- All KCRP metrics except those managed at the entity or client levels and which have the same targets - All Client required metrics
4.4	Digital Assisted Channel Performance		- All KCRP metrics except those managed at the entity or client levels and which have the same targets - All Client required metrics
4.5	KSP Performance	- All KSP performance metrics except Forecasting, Schedule Adherence, and Managing the IVR - CSS Attrition	- Forecast Accuracy Metrics (Staffing and Scheduling) - Schedule Adherence - Managing the IVR - Absenteeism - CSS Attrition Program Level

For a more detailed explanation of scoring, please refer to the COPC Customer Experience Standard Certification Guide.

Exhibits

There are three exhibits that together list the required metrics for the COPC CX Standard for Customer Operations.

- Exhibit 1 which contains the operational metrics for different types of operations
- Exhibit 2 contains the Key Support Process Metrics
- Exhibit 3 contains the Customer Experience and Overall Cost Metrics

Exhibit 1 is divided into **human assisted** and **digital assisted** channel metrics.

Exhibit 1 Human Assisted defines the metrics used to measure and manage key customer-related processes (KCRPs) within human assisted channels. Most human assisted channel KCRPs fall into one of two groups: **real time KCRPs**, in which the customer is engaged during the handling of the transaction, and **deferred KCRPs**, in which the transaction is handled in the absence of the customer. The metrics used to manage the human assisted channel KCRP depends on the group to which the KCRP belongs.

For each human assisted channel KCRP not listed in Exhibit 1 that the CSP or vendor performs, the CSP must determine if this KCRP is a real time or deferred transaction and use the appropriate metrics.

Exhibit 1 Digital assisted defines the metrics used to measure and manage KCRPs within digital assisted channels. As these KCRPs are system-based, the response times and service metrics may be replaced by measures of system performance.

Exhibit 2

Exhibit 2 defines the metrics used to measure and manage key support processes (KSPs). Each KSP is listed with its required metrics.

For each KSP not listed in Exhibit 2 that the CSP or key supplier performs, the CSP must use, as appropriate, On Time, Backlog, and Accuracy metrics.

Exhibit 3

Exhibit 3 defines the key outcome metrics which are required to measure how the handling of customers by one or more service channels impacts the customers' experiences and the overall cost to the Enterprise of servicing their customers by a combination of both human assisted and digital assisted channels.

Each exhibit defines the process and required metrics, how each metric must be measured, and any special considerations.



Exhibit requirements:

1. The CSP may combine tracking of metrics from several KCRPs if the CSP has the same performance target for the metrics it seeks to combine. However, metrics for electronic and non-electronic transactions cannot be combined.
2. The requirement to track all Exhibit 1 metrics for a KCRP can be waived if the CSP performs the KCRP and the CSP can demonstrate that the volume of customer contacts for the KCRP is not material to either the CSP or to customers.
 - a. Guideline: If the KCRP represents 5% or more of customer contacts for a specific program, then the CSP must track all required metrics.
 - b. If the KCRP represents less than 5% of customer contacts for a specific program, then the CSP must track and CUIKA either On-Time or Accuracy to determine if the process is in control.
3. If the CSP tracks small volume KCRP's, (typically a KCRP with less than 5% of the volume of transactions for that program), for the purpose of calculating compliance with Item 4.6 *Achieving Results*, the percentage of overall metrics made up by small volume KCRP's must be collectively less than 10% of the required metrics.

Exhibit 1: Key Customer-Related Processes (KCRPs)

KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Human Assisted Real Time Transactions: Real Time transactions are typified by: - There is a live engagement with the customer, and the customer is present throughout the queue time. - The customer determines when to contact the center, and the center is reacting to this demand. - The center has a limited time to pick up the transaction before the customer abandons. - Backlogs are not experienced as the customer abandons if the call is not answered in a reasonable timeframe.	Service	2.4/4.3 Speed of Answer – Must track Service Level, i.e., % of transactions answered within targeted time period, or Average Speed of Answer (ASA)	Percent of transactions answered <u>before</u> a targeted threshold, e.g., 40 seconds, or Average time to answer all transactions in period (ASA)	Service Level must be based on transactions <u>offered</u> to the CSS queue, not on transactions <u>answered</u> by CSS queue. If using ASA, must CUIKA the distribution of answer speed around the average. Where it is not appropriate or possible to measure Service Level or Abandonment Rate at the site level for a program, such as in a shared queue operation, then the CSP must measure Schedule Attainment for each location participating in the Shared Queue.	Set target based on customer expectation and type of service.	Measured and Analyzed Monthly
		2.4/4.3 Abandonment Rate – e.g., % of transactions abandoned before being answered by a live CSS	The number of callers who hang up after the IVR but before they talk to a live CSS expressed as a percentage of calls offered.	If there is an IVR or message system, then a short abandon threshold should not be used. Abandon Rate and Speed of Answer targets should be mathematically consistent.	Target set based on customer expectation and type of service	Measured and Analyzed Monthly
	Quality	2.7/4.3 Customer Critical Error Accuracy – e.g., accuracy rate of customer affecting critical errors of transactions monitored)	Errors that are critical from the customer's perspective (e.g., wrong information, mistreating the customer [e.g., rudeness], not resolving the customer's issue, etc.) $\frac{\text{Transactions with no CC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Customer Critical Error. Measured by Unit – where a unit = a transaction	When measuring satisfiers and dissatisfiers 95% (By Unit) When measuring satisfiers only 98% (By Unit)	Measured and Analyzed Monthly



KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Types of KCRPs which are Real Time Transactions are: – Inbound customer calls – Web chat – Escalations (Live transfer of phone calls) – Person to Person Customer Services Note: For real-time channels (e.g., Chat) where a single transaction spans several individual interactions, quality metrics must be evaluated for the complete transaction and not for individual interactions.	Quality	2.7/4.3 Business Critical Error Accuracy – e.g., accuracy rate of business affecting critical errors of transactions monitored	Errors that are critical from a CSP or Client perspective but do not negatively impact customers. $\frac{\text{Transactions with no BC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Business Critical Error Measured by Unit – where a unit = a transaction	90%	Measured and Analyzed Monthly
		2.7/4.3 Compliance Critical Error Accuracy – e.g., accuracy rate of compliance affecting critical errors of transactions monitored	Errors associated with National, State or Federal compliance or compliance to any industry regulatory body $\frac{\text{Transactions with no CompC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Compliance Critical Error Measured by Unit – where a unit = a transaction	99.5% However, this will vary with whatever are the regulatory bodies' requirements.	Measured and Analyzed Monthly
		4.3 Contact Resolution – Must track Issue Resolution, First Contact Resolution, or First Call Resolution	Number of transactions that were resolved as a percentage of the total number of transactions answered. Or Number of transactions that were resolved during the first contact as a percentage of the total number of transactions answered.	There is no consistent industry-standard way of measuring Contact Resolution. Approaches include measuring in a customer survey, by analysis of repeat transactions in CRM data or during transaction monitoring.	There is no benchmark or best practice target for Contact Resolution. Targets and results should be consistent with Customer Satisfaction Targets and Results.	Measured and Analyzed Monthly
	Sales	4.3 Sales – Must track conversion rate (e.g., percent of calls with a sale) or conversion volume (e.g., dollars sold)	Number of transactions where the sales/revenue objective is achieved (e.g., a sale or appointment is made) as a percentage of total transactions answered. Or Total value or volume of sales/revenue objective achieved in a given period	Services that have a revenue-related objective (e.g., making appointments, completing surveys, saving customers, generating leads) must use this metric.	Targets for sales/revenue will be Program dependent.	Measured and Analyzed Monthly
		Volume – e.g., number of calls received per period			Volume metrics do not require a target.	Measured Monthly

KCRPs	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	Efficiency	4.3	CSS Utilization – Percentage of paid time that CSSs are either performing productive work or available to handle customer transactions.	Must be calculated as: $\frac{\text{Productive Time} + \text{Available Time}}{\text{Paid hours Onsite}}$	Productive work includes call handle time and time spent working on other types of customer transactions (e.g., correspondence, cases). Available time is the time that CSSs are waiting for transactions.	86%	Measured and Analyzed Monthly
		4.3	AHT – The average time it takes to handle a Real Time transaction including any work carried out after the customer disconnected	Must be calculated as: $\frac{\text{Total Handle Time (inc. ACW)}}{\text{Transactions Handled}}$	Average time spent per answered transaction, including talking to a customer (ATT), on hold with a customer, or in After Call Work (ACW).	Targets for efficiency are better set with a goal of continual improvement and can be based, initially, on budget assumptions or similar financial indicators.	Measured and Analyzed Monthly



KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Human Assisted Deferred Transactions: Deferred transactions are typified by: - The customer is not actively engaged during the queue time. - The center determines when to process the transaction. - The cycle times for deferred transactions are usually measured in hours or days. - Transactions waiting to be processed are termed backlog. Types of KCRPs which are deferred transactions are: - Emails - Web Mails - Letters and Faxes - Call Backs - Voice Mail message processing - Internal Escalations (except live transfers) - Exceptions - Payment Processing	Service	2.4/4.3	On Time – Must track percentage of transactions processed within the targeted cycle time On time is the percent of transactions processed within the targeted cycle time.	Target Cycle Time is the target time for processing a transaction end-to-end from the customer's point of view. Where it is not appropriate or possible to measure On Time or Backlog at the site level for a program, such as in a shared queue operation, then the CSP must measure Schedule Attainment for each location participating in the Shared Queue.	95% for any Cycle time requirement	Measured and Analyzed Monthly
		2.7/4.3	Customer Critical Error Accuracy – e.g., accuracy rate of customer affecting critical errors of transactions monitored $\frac{\text{Transactions with no CC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Customer Critical Error. Measured by Unit – where a unit = a transaction	When measuring satisfiers and dissatisfiers 95% (By Unit) When measuring satisfiers only 98% (By Unit)	Measured and Analyzed Monthly
	Quality	2.7/4.3	Business Critical Error Accuracy – e.g., accuracy rate of business affecting critical errors of transactions monitored $\frac{\text{Transactions with no BC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Business Critical Error. Measured by Unit – where a unit = a transaction	90%	Measured and Analyzed Monthly
		2.7/4.3	Compliance Critical Error Accuracy – e.g., accuracy rate of compliance affecting critical errors of transactions monitored $\frac{\text{Transactions with no CompC Errors}}{\text{Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Compliance Critical Error. Measured by Unit – where a unit = a transaction	99.5% However, this will vary with whatever are the regulatory bodies' requirements	Measured and Analyzed Monthly

KCRPs	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
- Most Back Office Functions - Processing Orders Note: For deferred channels (e.g., Social Media, SMS, WhatsApp) where a single transaction spans a number of individual interactions, quality metrics must be evaluated for the complete transaction and not for individual interactions.							
		4.3	Contact Resolution – Must track Issue Resolution or First Contact Resolution.	Number of transactions that were resolved as a percentage of the total number of transactions handled. Or Number of transactions that were resolved during the first contact as a percentage of the total number of transactions handled	There is no consistent industry standard way of measuring Contact Resolution. Approaches include measuring in a customer survey by analysis of repeat transactions in CRM data or during transaction monitoring	There is no benchmark or best practice for Contact Resolution. Targets and results should be consistent with Customer Satisfaction Targets and Results.	Measured and Analyzed Monthly
	Sales	4.3	Sales – If appropriate - Must track conversion rate (e.g., percent of transactions with a sale) or conversion volume (e.g., dollars sold)	Number of transactions where the sales/revenue objective is achieved (e.g., a sale or appointment is made) as a percentage of total transactions answered. Or Total value or volume of sales/revenue objective achieved in a given period.	Services that have a revenue-related objective (e.g., making appointments, completing surveys, saving customers, generating leads) must use this metric.	Targets for sales/revenue will be Program dependent.	Measured and Analyzed Monthly
			Volume – e.g., number of transactions received per period			Volume metrics do not require a target.	Measured Monthly

KCRPs	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	Efficiency	4.3	Efficiency – e.g., average processing time per transaction, transactions processed per CSS hour, cost per transaction	No specific metric is required if it is: - comparing units of input to units of output and - relevant to the KCRP that it is measuring	A common metric used to manage deferred transaction efficiency is the number of transactions processed per given time period (usually a CSS hour or day) instead of measuring handle time since it may be difficult to track this without a specialist transaction tracking tool.	Targets for efficiency are better set with a goal of continual improvement and can be based, initially, on budget assumptions or similar financial indicators.	Measured and Analyzed Monthly

KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Front Stage Conversational Digital Assisted Transactions: Handling of customer-facing interactions where there is a dialogue between the digital system and the customer without CSS involvement. Typical Front Stage Conversational Digital Assisted KCRPs: – Voice Bots – Chat Bots – Digital Humans – Smart IVR Solutions	Service	4.4 Service Rate – e.g., Completion rate of customers using the service	Total interactions completed using service functionality divided by the total number of transactions eligible for the service	The number of transactions eligible for service are those transactions where the customer has had a meaningful interaction with the system to try to obtain specific information or a resolution	There is no benchmark or best practice target for Service Rate	Measured and Analyzed Monthly
		4.4 System Uptime – e.g., % of time system is fully functional; System Latency	The basis for these measurements must be full functionality of the system from a customer perspective and not simply hardware availability.	Metrics should be measured on total time. Digital assisted channel systems are expected to be available 24/7	>99.6% System Uptime	Measured and Analyzed Monthly
		4.4 Autonomous Handle Rate – e.g., % of interactions handled by a digital assisted system, end-to-end, without human involvement	The percentage of interactions in which the digital assisted system (e.g., bot or RPA) handled the transaction, end-to-end, autonomously without choosing to transfer, escalate, or seek any other form of human involvement, compared to the total number of interactions initiated with the digital assisted system $\frac{\% \text{ digital assisted interactions handled without human involvement}}{\text{number of initiated digital assisted interactions}}$	Also referred to as Containment Rate or Automation Score	There is no benchmark or best practice target for Autonomous Handle Rate	Measured and Analyzed Monthly
		Volume	The total number of customer-facing digital transactions eligible for service from all digital systems		Volume does not require a target	Measured Monthly
		Number of Conversations	The total number of customer-facing digital assisted conversations (specific to bots)	A conversation is a complete transaction between a bot and a human. The individual interactions within the conversation are considered messages	Number of Conversations does not require a target	Measured Monthly



KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	Quality	4.4 Recognition Accuracy– e.g., % of correctly recognized customer inputs or the confidence achieved by the system while handling customer interactions <i>This is a recommended metric not currently required by the COPC Standard.</i>	The number of customer inputs or intents correctly recognized and actioned by the digital assisted channel OR The level of confidence achieved by the digital assisted channel while handling the customers interaction	This metric indicates the accurate processing of input and identification of intents by the customer-facing digital system as well provides insight in the efficiency and effectiveness of the interaction. To be measured on all transactions by for example the confidence level or confirmation rate in the flow, or to be defined by quality management sampling with a specific attribute.	There is no benchmark or best practice target for Recognition Accuracy	Measured and Analyzed Monthly
		2.7 / 4.4 Customer Critical Error Accuracy – e.g., accuracy rate of customer affecting critical errors of transactions monitored	Errors that are critical from the customer's perspective (e.g., wrong information, mistreating the customer [e.g., rudeness], not resolving the customer's issue, etc.) $\frac{\text{\# Transactions with no CC Errors}}{\text{\# Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Customer Critical Error Measured by Unit – where a unit = a transaction	Varies by industry and transaction type, however the target needs to be equal or higher than the human assisted channel benchmark	Measured and Analyzed Monthly
		2.7 / 4.4 Business Critical Error Accuracy – e.g., accuracy rate of business affecting critical errors of transactions monitored	Errors that are critical from a CSP or Client perspective but do not negatively impact the customers. $\frac{\text{\# Transactions with no BC Errors}}{\text{\# Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Business Critical Error Measured by Unit – where a unit = a transaction	Varies by industry and transaction type, however the target needs to be equal or higher than the human assisted channel benchmark	Measured and Analyzed Monthly
		2.7 / 4.4 Compliance Critical Error Accuracy – e.g., accuracy rate of compliance affecting critical errors of transactions monitored	Errors associated with National, State, or Federal compliance or compliance to any industry regulatory body. $\frac{\text{\# Transactions with no CompC Errors}}{\text{\# Transactions Monitored}}$	Percent of transactions monitored that <u>do not</u> have a Compliance Critical Error Measured by Unit – where a unit = a transaction	Varies by industry and transaction type, however the target needs to be equal or higher than the human assisted channel benchmark	Measured and Analyzed Monthly

KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	4.4	Contact Resolution – Must track Issue Resolution or First Contact Resolution	Number of transactions that were resolved as a percentage of the total number of transactions handled Or Number of transactions that were resolved during the first contact as a percentage of the total number of transactions handled	There is no consistent industry standard way of measuring Contact Resolution. Approaches include measuring in a customer survey, by analysis of repeat transactions in the CRM data, or during transaction monitoring	There is no benchmark or best practice target for Contact Resolution Targets and results should be consistent with Customer Satisfaction targets and results	Measured and Analyzed Monthly
	4.4	Sales – If appropriate, e.g., Success Rate; monetary value per contact	Number of contacts where the sales/ revenue objective is achieved as a percentage of total contacts received Or Total value or volume of sales /revenue objective achieved in each period	Services that have a revenue-related objective (e.g., booking appointments; completing surveys) must use this metric	Targets for sales/revenue will be program dependent	Measured and Analyzed Monthly
	4.4	Cost or Efficiency – e.g., Cost per Conversation; Average Conversation Time; Deflection Rate - % of transactions deflected from human assisted channels	Cost per conversation is measured as the cost of running the service divided by the total number of conversations eligible for service. Average Conversation Time is the avg duration of the total conversation between the digital system and the customer, also called Session Occupation Time. Deflection rate is the number of contacts that were deflected from reaching a human assisted channel.		There is no benchmark or best practice target for Cost per Conversation, Average Conversation Time, or Deflection Rate	Measured and Analyzed Monthly



KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	4.4	Messages per Conversation	The average number of messages generated by the digital assisted system (e.g., bot) during a customer-facing conversation, based on all handled conversations and the total number of messages generated by the digital assisted system		There is no benchmark or best practice target for Messages per Conversation	Measured and Analyzed Monthly

KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Front Stage Non- Conversational Digital Assisted Transactions: Handling customer-facing interactions where the customers only provide inputs and there is no dialogue between the digital system and the customer, without CSS involvement. Typical Front Stage Non-Conversational Digital Assisted KCRPs: - USSD - Mobile App - Website - MyDomain Environment	Service	4.4 Service Rate – e.g., Completion Rate of customers using the service	Total interactions completed using service functionality divided by the total number of transactions eligible for the service	The number of transactions eligible for service are those transactions where the customer has had a meaningful interaction with the system to try to obtain specific information or a resolution	There is no benchmark or best practice target for Service Rate	Measured and Analyzed Monthly
		4.4 System Uptime – e.g., % of time system is fully functional; System Latency	The basis for these measurements must be full functionality of the system from a customer perspective and not simply hardware availability.	Metrics should be measured on total time. Digital assisted channel systems are expected to be available 24/7	>99.6% System Uptime	Measured and Analyzed Monthly
		Volume	The total number of customer-facing digital transactions eligible for service from all digital systems	To indicate the adaption of customers to a channel and to identify the effectiveness of a channel it is recommended to report Number of Unique Users, in addition to the Volume	Volume does not require a target	Measured Monthly
	Quality	2.7 / 4.4 Defect Rate – e.g., number of defects detected by quality analysts or automated system checks	Examples but not limited to: • # users who zeroed out of self service • # defects detected during system checks • # defects determined during checks of completed transactions	Defects identified during system checks must be material and likely to cause impact to the customer or business	There is no Benchmark or best practice target for Defect Rate	Measured and Analyzed Monthly
		4.4 Contact Resolution – Must track Issue Resolution or First Contact Resolution	Number of transactions that were resolved as a percentage of the total number of transactions handled Or Number of transactions that were resolved during the first contact as a percentage of the total number of transactions handled	There is no consistent industry standard way of measuring Contact Resolution. Approaches include measuring in a customer survey, by analysis of repeat transactions in CRM data, or during transaction monitoring	There is no benchmark or best practice target for Contact Resolution Targets and results should be consistent with Customer Satisfaction targets and results	Measured and Analyzed Monthly



KCRPs	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
	Sales	4.4 Sales – If appropriate, e.g., Success Rate; monetary value per contact	Number of contacts where the sales/revenue objective is achieved as a percentage of total contacts received Or Total value or volume of sales /revenue objective achieved in each period	Services that have a revenue-related objective (e.g., booking appointments; completing surveys) must use this metric	Targets for sales/revenue will be program dependent	Measured and Analyzed Monthly
	Efficiency	4.4 Cost or Efficiency – e.g., Cost per Transaction; Deflection Rate - % of transactions deflected from human assisted channels	Cost per transaction is measured as the cost of running the service divided by the total number of transactions eligible for service. Deflection rate is the number of contacts that were deflected from reaching a human assisted channel.		There is no benchmark or best practice target for Cost per Transaction or Deflection Rate	Measured and Analyzed Monthly

KCRPs	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Back Stage Digital Assisted Transactions: Processing customer contacts or tasks by a system-based service without CSS involvement. Typical Back Stage Digital Assisted KCRPs: – RPAs	Service	4.4	System Uptime – e.g., % of time system is fully functional; System Latency	The basis for these measurements must be full functionality of the system from a customer perspective and not simply hardware availability.	Metrics should be measured on total time. Digital assisted channel systems are expected to be available 24/7	>99.6% System Uptime	Measured and Analyzed Monthly
			Volume	The total number of customer-facing digital transactions eligible for service from all digital systems		Volume does not require a target	Measured Monthly
	Quality	2.7 / 4.4	Defect Rate – e.g., number of defects detected by quality analysts or automated system checks	Examples but not limited to: # defects detected during system checks # defects determined during checks of completed transactions	Defects identified during system checks must be material and likely to cause impact to the customer or business	There is no benchmark or best practice target for Defect Rate	Measured and Analyzed Monthly
		4.4	Cost or Efficiency – e.g., Cost per Task, Average Processing Time	Cost per task is measured as the cost of running the task divided by the total number of tasks eligible for processing		There is no benchmark or best practice target for Cost per Task or Average Processing Time	Measured and Analyzed Monthly
	Efficiency	4.4	Messages per Conversation –	The average number of messages generated by the digital assisted system (e.g., bot) during a customer-facing conversation, based on all handled conversations and the total number of messages generated by the digital assisted system		There is no benchmark or best practice target for messages per conversation	Measured and Analyzed Monthly



Exhibit 2: Key Support Processes (KSPs)

KSP	Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Telecommunications Providing and maintaining telecommunications hardware, software, and services (e.g., long distance service, local line service, telecommunication switch, CSS phones, and call management software)	Service	4.5 Uptime/Accessibility – e.g., % of time the system is fully functional, % of timelines are fully available	The number of minutes of uptime of the switch as a percentage of the total minutes that the service is open.	This should be calculated as a percentage of the opening hours.	99.6%	Measured and Analyzed Monthly
Managing Production Systems Providing and maintaining hardware and software that support the systems that are used by CSP/ OSP staff to carry out a KCRP		4.5 Uptime/Accessibility – e.g., % of time the system is fully functional	The number of minutes of uptime of the information systems as a percentage of the total minutes that the service is open.	This should be calculated as a percentage of the opening hours. It is acceptable to report on each system separately. However, these should be combined to create a single metric for the levels calculation.	99.6%	Measured and Analyzed Monthly
Managing Content Keeping the knowledgebase up to date and accurate		4.5 On Time – e.g., On Time processing of information updates within targeted cycle times	The number of updates that were processed in the targeted time as a percentage of total updates		There are no specific benchmarks or best practice targets for Knowledgebase metrics.	Measured and Analyzed Monthly
	Quality	4.5 Content Accuracy – e.g., Percentage of searches where information was correct	The number of content checks that were complete and accurate as a percentage of the number of checks completed	This data may be sampled. This metric must consider both incomplete information (completeness) and inaccurate information (accuracy) as defects.		Measured and Analyzed Monthly

KSP	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Forecasting Accuracy Projecting the required resources in order to ensure sufficient capacity exists to meet service requirements at optimal efficiency.	Quality	2.4/ 4.5	Staffing Forecast Accuracy – e.g., actual required vs. forecasted staffing levels to identify required staffing levels to recruit/hire and train staff	The average of the absolute values of the weekly or daily percentage variance between the forecasted staffing levels and the required staffing levels.	Forecasting must be done at least at the weekly level accounting for the operational lag time for both hiring and training.	Various targets depending upon the volatility of the number of transactions, transaction handle time, and shrinkage percentage	Measured and Analyzed Monthly
		2.4/ 4.5	Scheduling Forecast Accuracy – e.g., actual required vs. forecasted staffing levels for scheduling resources to meet demand requirements.	The variance between the forecast and actual required staffing levels. This is calculated as the % of intervals that are within the +x% and -y% of the forecast staffing requirements.	Must account for the operational lag time for scheduling. Must be calculated at the interval level.	Various targets depend on the volatility of the transaction arrival rates.	Measured and Analyzed Monthly
Recruiting/Hiring Acquiring the necessary human resources to meet the staffing needs of the operation	Service	3.2/ 4.5	On Time – e.g., % of CSS staffing requests filled by the targeted date	Percentage of CSS staff requests filled by the targeted date	Recruiting more than the requested CSS staff does not result in an on-time greater than 100%. The maximum is 100%. Other KCR jobs are not included in this metric	Typically, 90% or above	Measured and Analyzed Monthly
Implementing New Programs The timeliness of meeting implementation milestones		2.12/ 4.5	On Time – e.g., % of program components delivered on time	The percentage of milestones that are completed on or before the planned date	It is not best practice, but it is compliant, to track only On Time to the agreed-to “go live” date.	Typically, 90% or above	Measured and Analyzed Monthly
Real Time Management Ensuring that the schedule or roster is implemented correctly		2.5/ 4.5	Adherence – e.g., Schedule Adherence, Conformance, Schedule Attainment	No specific metric is required. Examples could be: measuring schedule attainment (Were the right number of CSSs present in each interval compared to the schedule?); Schedule Adherence (Did each CSS adhere to the schedule as planned?); Schedule Conformance (Were the total available hours scheduled met?).			Measured and Analyzed Monthly



KSP		Item	Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Attrition Assessing the rate of staff departures for CSS	People	3.8/ 4.5	CSS Attrition – Annualized attrition of CSSs calculated at both the program and entity level	Number of leavers who were backfilled as a % of total heads.	Must be measured as heads, not FTE. Staff who leave during training are not included in this calculation. Annualization can be based upon 1 month or more of data. At entity level, the calculation is based upon the number of people who left the entity. At program level, it is based upon the number of people who left the role in the program (this includes promotions to another role in the same program).	Targets must be set based on an understanding of the cost of attrition and the impact on Service, Quality and Cost.	Measured Monthly and Analyzed Quarterly
		3.8/ 4.5	CSS Absenteeism – e.g., % of hours lost through absenteeism.	This is calculated as the number of hours lost through short term absenteeism as a percentage of scheduled hours.	CSS absenteeism includes only short-term absence. Short-term absence is an absence, for whatever reason, of those staff that were scheduled to work.	There is no best practice target for absenteeism.	Measured Monthly and Analyzed Quarterly
Service Management Metrics Controlling the performance of digital assisted systems	Service	2.6/ 4.5	Digital Assisted Systems Tickets On Time – e.g., on time by severity level	The percentage of digital assisted system trouble tickets that are resolved within the targeted time.	It is acceptable to set a target resolution time for each ticket based upon its severity.	Typically, 90% or above	Measured and Analyzed Monthly
		2.6/ 4.5	Forecast Accuracy – Peak e.g., % of days with an accurate peak forecast	The percentage of days that the actual peak demand was within a tolerance of the forecast peak in the day		Various targets depending upon the volatility of the transaction arrival rate.	Measured and Analyzed Monthly
	Quality	2.6/ 4.5	Forecast Accuracy – Run Rate e.g., % of days with an accurate forecast of the daily transaction rate	The percentage of days that the actual transaction arrival rate was within a tolerance of the forecast transaction arrival rate		Various targets depending upon the volatility of the transaction arrival rate.	Measured and Analyzed Monthly

Exhibit 3: Customer Experience and Overall Cost Metrics

Customer Experience and Cost Metrics	Item		Required Metrics	How the Metric is Measured	Special Considerations	Benchmark or Best Practice Target	Frequency
Service Journey Customer Experience Assessing the customer experience with the entire Service Journey	Customer Experience	4.1	Service Journey Customer Experience – e.g., Customer Effort Score	No specific metric is required as long as the organization is tracking the experience of the customer concerning the way that the resolution of a customer issue or request has been dealt with	This would apply to the service journeys identified in 2.1.1 <i>Defining and Managing Service Journeys</i> .	There are no specific benchmarks or best practice targets	Measured Monthly and Analyzed Quarterly
Customer Satisfaction and Dissatisfaction The Customer Experience with a channel is assessed by measuring how satisfied/dissatisfied customers are with the service(s) provided by the CSP.		4.1	Overall Customer Satisfaction – Must track overall customer satisfaction for each channel at the individual transaction and program level	Number of responses to surveys that score the overall satisfaction in the top two box as a percentage of the total completed surveys received	COPC Inc. uses a 5-point scale with a neutral mid-point. It is compliant to use other scales. If another scale is used the CSP must define the appropriate metric based upon a number of boxes. It is also the responsibility of the CSP to demonstrate that their target is high performing.	85% Top Two Box on a 5-point scale with neutral mid-point	Measured and Analyzed Monthly
		4.1	Overall Customer Dissatisfaction – Must track overall customer dissatisfaction for each channel at the individual transaction and program level	Number of responses to surveys that score the overall satisfaction in the bottom box as a percentage of the total completed surveys received		Typically, 5% or below	Measured and Analyzed Monthly
Overall Cost Performance The CSP must measure the overall cost of handling customers across all the channels they employ	Cost	4.2	Cost per X – e.g., Cost per Customer Served, Cost per Resolution, Cost per Contact, Cost per Unit Sold, Cost per Customer in the customer base	No specific metric is required. (Costs are based on total costs of service delivery)	The CSP must ensure the costs for human assisted and digital assisted channels are blended to allow the tracking of changes to overall cost from moving transactions from one channel to another		Measured and Analyzed Monthly

Glossary

Abandoned Calls	Calls answered by the ACD system and placed in a live agent or voice response queue but are disconnected by the caller or incorrectly dropped by the queue management system before being answered.
Absenteeism	A measure of the percentage of staff that are not present during their scheduled shifts (see Item 3.8 <i>Staff Attrition and Absenteeism</i>).
Absenteeism Costs	Typically include most or all the following: - Cost of overtime – additional hours needed to compensate for absent staff - Cost of increased staffing – additional staff needed to compensate for absence - Cost of lost productivity – hours away from work (e.g., for doctor appointments) - Associated costs from absenteeism – poor Service Level, reduced revenue, increased delinquency, or other performance indicators
Accuracy	The quality of the transaction. This measurement is usually separated into Customer Critical, Business Critical and Compliance Error Accuracy. Accuracy may be measured as “percent correct”, “percent defective”, or “defective parts per million (dppm)”.
After Call Work (ACW)	A component of Average Handle Time (AHT). An ACD work-state that tracks how long each CSS is unavailable to take another call because of additional activities necessary to complete the previous call. This includes online entries that could not be completed during the call such as call wrap-up codes, free text comments, and research. On some ACD systems, this is also called Wrap.
Aging	Categorization of the age of Items in backlog that have not been processed. It must be calculated as “Average Time Late” (ATL).

- Applied** A designation from COPC Inc. identifying entities that have formally committed to pursue certification to the COPC CX Standard.
- Approach** The processes, practices, and procedures CSPs must develop and implement to meet the requirements of the COPC CX Standard.
- Attrition** Voluntary and involuntary staff separations (see Item 3.8 *Reducing Attrition and Absenteeism*).
- Attrition Costs** Typically include most or all the following:
- Compensation of new hires for non-productive period (training time)
 - Agency fees
 - Cost of “lost” production opportunity (pay per call x number of calls/day)
 - Period new hire is not “on the job”
 - Cost of recruitment – internal and external (newspaper ads, job fairs, and CSP personnel time)
 - Cost of training – the allocated costs per student for the training program
 - Ramp up costs – efficiency of new hires vs. experienced agents commonly referred to as “learning curve” costs. Typically, these costs include reduced production, accuracy (fixing errors made by new staff), and the resulting adverse impact on Client and Customer satisfaction.
 - Overtime incurred due to reduced staff size
- Automatic Call Distributor (ACD)** The system used by inbound call centers to answer and distribute calls on a first-come/first-served basis amongst the available CSS. These systems can be standalone or part of larger telecommunications systems. They usually have the capability to hold callers in queue, play announcements, and location data about the calls for report purposes.



Auxiliary Time (Aux)	Non-telephone time in the CSS scheduled day. This often includes time spent on training, breaks, meetings, special projects, restroom visits or getting coffee. Most customer contact telephone systems have a feature called 'Aux Time' or 'Aux State' that is tracked through the use of one or more telephone buttons. Larger than expected segments of auxiliary time should be noted by Supervisors to identify and analyze possible performance metric deviations.
Available Time	The time between transactions in which CSSs are ready to accept the next transaction.
Average Time Late (ATL)	A weighted average calculation used to monitor late backlog.
Average Handle Time (AHT)	The average amount of time CSSs spend processing a transaction. This includes time spent communicating with customers, putting customers on hold (hold time), and wrapping up the transaction after the customer has ended his/her participation in the transaction.
Average Speed of Answer (ASA)	The average amount of time all customers wait in queue before their calls or chat requests are answered by CSSs. Because abandoned calls can distort the value of this metric, it is important to clarify if and how abandoned calls are used in this calculation.
Average Talk Time (ATT)	The average length of time CSSs are on the telephone with a caller. (Ideally, the time the caller spends on hold is not included in this metric. If hold time cannot be separated, consider this in the utilization formula). ATT is typically calculated as the total amount of time on the phone divided by the total number of calls taken. This is also called ACD time in some telephone systems.
Backlog	Transactions that have been received but not processed within the defined cycle time. The appropriate measure for backlog is Average Time Late (ATL).
Back Stage Digital Assisted Transactions	Processing customer contacts or tasks by a system-based service without CSS involvement. These are typically RPAs.

- COPC Baseline Assessment** An audit conducted by one or more COPC Registered Auditors and designed to provide a gap analysis of where the entity stands on all Items of the COPC CX Standard. It is used to identify the non-compliant Items so the entity can take appropriate action prior to the COPC® Certification Audit.
- Benchmark Data** COPC Inc.'s first-hand experience from audits and reviews conducted around the world and across industry and/or business sectors. These are the best examples of performance and practices observed by COPC Inc. to address *Category 4.0 Performance* of the COPC CX Standard.
- Best Practice** COPC Inc.'s first-hand experience from audits and reviews conducted around the world and across industry and/or business sectors. This is the best approach, process, or method witnessed by COPC Inc. to address either a particular requirement of the COPC CX Standard or a process that is performed in a customer contact operation.
- Blocked Transactions** The number of calls not received due to network, trunk, or PBX limitations and/or settings. Blocked transactions may be measured as the amount of time the network(s), trunk(s), or PBX are at capacity and must be tracked at least quarterly. This frequency must be increased if customer satisfaction and dissatisfaction data indicates an issue with customer access.
- Bot** Bot -- short for "robot" and called a chatbot or an internet bot -- is a computer program that operates as an agent for a user or other program, or to simulate a human activity. Bots are normally used to automate certain tasks, meaning they can run without specific instructions from humans.
- BPO** BPO covers a spectrum of activities that involve the outsourcing of Back Office work to be handled by an Outsource Service Provider (OSP) or a CSP.



Business Critical Errors Anything from the business perspective that causes the transaction to be defective, such as:

- Unnecessary cost to the business
- Unnecessary loss of revenue to the business

“Business” could mean “Client” for an OSP or “company” for a CSP or VMO.

Business Plan A document used by the CSP containing actions to meet the specific objectives established by (or for) the CSP that identifies the individuals responsible for meeting the objectives, for taking the actions and the milestones/target dates that should be met.

Calibration Sessions Meetings during which individuals responsible for the monitoring of transactions compare scoring results for selected transactions and discuss the scoring of these transactions to ensure consistency of scoring. These sessions include quantitative evaluation of the consistency of the scores via comparison to a gauge or reference at the attribute level and their correlation with measures of the customer experiences and scores provided by clients.

Capacity Plan This is typically the model used to determine the number of CSSs that will be required to be employed by the CSP at a future date. The capacity plan (also referred to as a “staffing plan”) is normally created well in advance of the period planned for to allow for the length of time that is required to recruit and train additional staff or create additional workspace. This is distinct from the schedule which determines when existing staff will work.

Case Management Case Management is concerned with the management of complex transactions that require multiple interactions to resolve. Cases will include Complaint Handling, Warranty Claims, Technical Support, On-site repair, Return to base repair, Application processing.

COPC Certification Audit	A comprehensive review of all Items of the COPC CX Standard to determine the extent to which an entity has implemented the COPC CX Standard. It typically requires two to three COPC Registered Auditors on site for three to five days. The output from this audit is a certification decision and written report. See the COPC CX Standard Certification Guide or VMO Certification Process for further details (separate documents).
Chat	A real time electronic interaction between a CSS and customer utilizing an application on the company's website.
Chatbot	A digital assisted system that conducts a "chat" with a customer using either pre-programmed potential responses or responses based on a self-learning autonomous decision algorithm.
Client	Clients are the companies that hire OSPs to provide products and services to their customers.
Client Complaint	Any negative comment from a client received in person or by phone, mail, fax etc. about any aspect of the CSP/OSP/VMO's products, services, staff, or CSSs.
Compliance Critical Error	An inaccuracy that causes an entire transaction to be deemed defective because it is against prevailing regulations or laws and could cause personal or company liability.
Compliant	Meeting the detailed, individual Item requirements of the COPC CX Standard.
Concurrency	The measure of the rate at which chat transactions are processed concurrently
Concurrent Sessions	Chat transactions being processed simultaneously by a CSS.
Confidence Interval (Precision)	Based on a given set of sample data, a confidence interval gives an estimated range of values that is likely to include an unknown population parameter (e.g., mean). Confidence intervals are expressed as a +/- percentage. For example, the results of a customer satisfaction survey may indicate the average score is 87% with a confidence interval of +/-3%. This indicates the actual average satisfaction of the population is between 84% (87%-3%) and 90% (87%+3%).



Contact Channel A method by which a customer contacts a company to resolve an issue or make a request and/or the company contacts a customer in response to a previous customer inquiry. Contact channels may include but are not limited to:

1. Inbound phone, including the IVR
2. Social media
3. Discussion boards
4. Email
5. Chat
6. Digital applications
7. Stores, branches, kiosks, and other physical locations
8. Call-backs
9. Text or SMS (short messaging service)

Contact channels do not include marketing communications.

Content Content is the information either contained in customer-facing systems (digital assisted channels) or for CSSs to reference when supporting customers (human assisted channels).

Conversation In the Standard, this refers to the entire interaction between a customer and a bot/chatbot. The individual interactions that make up the conversation between the customer and bot are called messages.

Cost Typically focuses on efficiency and the cost per unit incurred by an entity to provide a product or service. Cost is different from price. Price represents what an entity might charge for its services or the cost burden transferred to the parent corporation.

Critical Error An inaccuracy that causes an entire transaction to be deemed defective. Typically, these are errors that will cause the customer to contact the CSP/OSP/VMO again or will result in unnecessary expense for either the customer (Customer Critical Errors) or the CSP, VMO, or Client (Business Critical Errors) (see also Compliance Accuracy).

CSS (Customer Service/ Support Staff) Staff that processes customer transactions in a customer contact operation (e.g., calls, emails, web inquiries, fax, mail, etc.), locations, offices, and field service dispatch. Alternative terminology often used in the industry includes agents, CSRs, technical service representatives, collectors, retail staff, technicians, and associates.

CUIKA COPC Inc. acronym used to describe the collection, analysis, and use of performance data to enable the entity to achieve its service, quality, cost, and customer experience targets (as appropriate). All performance data in *Category 4.0 Performance* must be “CUIKA”. The elements of CUIKA are contained in Items 1.3, 1.4, and 2.14 of the COPC CX Standard.

Customers The end users of an organization’s products or services. Customers may be consumers, businesses, field organizations, or the retailers, distributors, and specialists that encompass a distribution channel.

Customer Critical Errors Anything from the customer’s perspective that causes the transaction to be defective, such as:

- Not solving the query (whether or not this necessitates a repeat transaction)
- Mistreating the customer
- Failure to communicate clearly

Customer Experience Performance Leader (CXPL) Someone who has successfully completed COPC Best Practices for CX Operations Training. The person from the entity responsible for coordinating all activities to reach compliance with the COPC CX Standard. This person is usually the primary interface between the entity and COPC Inc.

Customer Experience The cumulative impact of multiple touchpoints over the course of a customer's interaction with an organization.

Customer-Facing Systems Systems with which customers directly interact. These include IVR systems and websites but also cover any self-service provisions which the CSP/OSP/VMO provides to the customer. (Examples: IVR call routing, IVR self-service, digital applications, chatbots).



- Customer Service Provider (CSP)** CSPs provide services to customers on behalf of internal Clients who are part of the same organization. CSPs encompass most, if not all, types of service environments.
- Customer Support Systems** Digital assisted systems used by CSSs and other staff to support customers.
- Cycle Time** The elapsed time for the end-to-end handling of a transaction from the customer's point of view. This is used to determine the speed of answer for deferred transactions.
- Defect** An error or an undesired result that is different from the planned or expected outcome.

Deferred Transactions Deferred transactions are typified by:

- The customer is not actively engaged during the queue time
- The center determines when to process the transaction
- The cycle time is usually measured in hours or days
- Transactions waiting to be processed are termed backlog

Types of KCRPs which are deferred transactions include:

- Emails
- Web Mails
- Letters and Fax
- Call Backs
- Voice Mail Message Processing
- Internal Escalations (except live transfers)
- Exceptions
- Payment Processing
- Most Back Office Functions
- Processing Orders
- Assembling Product
- Pick, Pack, Ship
- Processing Returns
- Material Receipt & Put away
- Service Dispatch
- Case Management
- Processing Lit Requests
- Processing Do Not Call List
- Processing Client Files
- Activating Accounts
- Processing Letters
- Receiving & Preparing Transactions

Demand (Demand Requirement) A calculation that identifies the expected CSS resources needed, based on the targeted Service Level (Cycle Time), forecasted transaction volume and forecasted AHT (“Unloaded Demand”) or based on the targeted Service Level (Cycle Time), forecasted transaction volume, forecasted AHT, and forecasted shrinkage (“Loaded Demand”).



Department	Within an entity, a distinct group or segment of the operation most often defined by the entity's organization structure. The department may be comprised of the operation's service delivery customer contact component or a support service (e.g., human resources, information technology).
Department Business Plan	The annual plan, prepared at the departmental level, which must contain quantified financial targets (e.g., improving productivity and efficiency, increasing revenue, reducing costs, or achieving budget) and non-financial targets for those Category 4.0 Performance metrics that relate to the statement of direction and annual entity business plan.
Deployment	The extent to which approaches are used throughout the organization.
Digital Assisted Channel	A method of support in which the service is provided by an electronic system and a CSS is not involved. Examples include service provided by digital applications, IVRs and automated teller machines.
Downstream	Steps in a process or journey that take place later than at a given point.
Efficiency Metrics	Units of input (typically labor hours or costs) divided by units of output (typically number of transactions, time, or revenue). Also referred to as productivity metrics.
Email	Electronic memos and letters sent over an internal or external network. These can be free-form messages or information provided by filling in an electronic form.
Employee Lifecycle	The different stages an employee experiences within a specific job and through the employee's progression within the organization.
End-to-End Evaluation	Analysis of processes from start to finish with start defined as the time the transaction is delivered to the entity (e.g., day and time an email is received, day and time a fax is received) and finish defined as the time the transaction is completed from the customer's perspective (e.g., when the product ships, when an email response is sent to the customer).

Enterprise The organization within which the CSP is situated.

Entity The company, organization, or service operation applying, or seeking certification to a COPC CX Standard. As an example, any of the following could be considered an entity for the purposes of certification to the COPC CX Standard:

- Valu-Write Service Corporation.
- The San Jose Customer Service Center of Valu-Write Service Corporation.
- The Technical Support Operation of the San Jose Customer Service Center of Valu-Write Service Corporation.
- The Megasoft PowerNotes Unit of the Technical Support Operation of the San Jose Customer Service Center of Valu-Write Service Corporation.

Entity Business Plan The annual plan, prepared at the entity level, which must contain quantified financial targets (e.g., improving productivity and efficiency, increasing revenue, reducing costs, or achieving budget) and non-financial targets for those Category 4.0 Performance metrics that relate to the statement of direction.

Exceptions Non-compliant transactions (e.g., incomplete applications, checks that are over or short paid, incomplete orders).

Exemption (or Waiver) Required when the CSP/OSP is not able to demonstrate a competence in one or more Items.

This may be due to:

- Client policy (e.g., forbidding contact with customers to conduct customer satisfaction surveys)
- Deficiencies in Client systems or processes
- Conflict with Client contractual or commercial terms (e.g., low target requirements)
- Client not responding

These are mainly applicable to the COPC CX Standard for Contact Centers.



Exit Rate	For Face-to-Face operations, Exit Rate is measured as the delta between footfall and customers that register for a queue.
Failure	Failure in the COPC CX Standard is defined as an unsuccessful outcome that did not achieve the intent of the process (thereby negatively affecting the customer experience), e.g., not being directed to the right location by a digital assisted system; not providing the programmed response; product not functioning as intended.
First Call Resolution	The percentage of calls successfully processed during the first call made by the customer and not resulting in a repeat call on the same issue. Sometimes referred to as 'FCR'.
First Contact Resolution	The percentage of transactions successfully processed during the first contact made by the customer and not resulting in a transfer or repeat contact on the same issue. Sometimes referred to as 'FCR'.
Forecast Accuracy	The quantified difference between a forecasted number (e.g., volume, AHT, required staff) and the actual results as a percentage of the forecast.
Forecasting	Analysis of historical transaction volume and AHT, arrival patterns, and shrinkage to determine future patterns and demand requirements.
Front Stage Conversational Digital Assisted Transactions	The handling of customer-facing interactions where there is a dialogue between the digital system and the customer without CSS involvement. These are typically voice bots, chat bots, digital humans, or smart IVR solutions.
Front Stage Non-Conversational Digital Assisted Transactions	The handling of customer-facing interactions where the customers only provide inputs and there is no dialogue between the digital system and the customer, without CSS involvement. These are typically USSD, mobile app, website, or mydomain environment.
Full Time Equivalent (FTE)	Usually defined by the entity. It requires standardizing full-time and part-time employees to a full-time equivalent. For example, two part-time employees who each work half time are typically considered one FTE.

High-Performing Organizations	Companies and entities that are generally recognized as having achieved high levels of service, quality, revenue, cost, and customer satisfaction.
Human Assisted Channel	A method of support in which the service is provided by a CSS who helps the customer. This typically includes service provided by phone, email, chat, social media, or in-location staff.
Incident	An incident is a customer issue or problem, and all the associated work that is involved in handling it until it is resolved.
Indefinite Staff	Staff occupying positions with no known end date.
Intelligent Voice Response/ Interactive Voice Response (IVR)/Voice Response Units (VRU)	There are several interpretations for the acronym IVR: Intelligent Voice Response, Interactive Voice Response, and Voice Response Units (VRU). It is an electronic (e.g., touchtone, voicemail or speech recognition) decision tree used to route a customer to automated information or the appropriate queue.
Interval	A term used in forecasting, staffing, and scheduling to define the appropriate time interval for creating forecasts and schedules. It applies to both real time and deferred transactions. Intervals for inbound phone transactions are usually 15 or 30 minutes. For deferred transactions such as email, the interval used is normally related to the target cycle time and is usually measured in hours.
Issue Resolution	The percentage of processed transactions in which the customers' requests were successfully resolved.
Key Business Processes (KBPs)	KBPs are those processes that are critical to a VMO's ability to deliver high levels of performance to customers and clients for the products and services it offers.



Key Customer Related Jobs (KCR Jobs) Those positions that either perform or directly manage staff performing KCRPs (see examples below).

- For customer-contact operations, KCR jobs include phone, email or web agents, collectors, telemarketers, and mail/fax processors, as well as the staff who direct, manage, and evaluate their performance (often referred to in the industry as leads or supervisors).
- For fulfillment operations, KCR jobs include assemblers, pick-pack-shippers, and material handlers, as well as the staff who direct, manage, and evaluate their performance.
- For field service operations, KCR jobs include staff who are dispatched to the customer site, as well as the staff who direct manage, and evaluate their performance.
- For stores, branches, etc., KCR jobs include staff who interface directly with customers (e.g., cashiers, associates, tellers, etc.) as well as the staff who direct, manage, and evaluate their performance.
- For the COPC CX Standard for Contact Centers, KCR jobs include those that deliver CSS or digital system training, update or manage content, perform CSS or digital system transaction monitoring, workforce planning, scheduling, and real time management, those who recruit CSSs, staff responsible for functional configuration of customer-facing digital assisted systems, and client relationship managers.

Key Customer Related Processes (KCRP) Those processes that are critical to the CSP/OSP's ability to deliver high levels of performance to customers and clients for the products and services it offers. These processes are identified in Exhibit 1 of the COPC CX Standards.

Key Suppliers Key suppliers are those organizations, external to the entity, that perform a KSP. These suppliers need not be external to the *company*; other parts of the company that are not part of the entity may also be considered key suppliers. Corporate departments that provide information systems and telecommunications represent key suppliers. Key suppliers may also include Clients and Client-designated companies.

Key Support Processes (KSPs) Key support processes are those processes necessary to enable a CSP/OSP to perform KCRPs or a VMO to perform KBPs to meet targeted levels. These almost always include information systems, forecasting, hiring, and recruiting, training, and telecom (for customer contact operations). KSPs are identified in Exhibit 2 of the COPC CX Standards.

Knowledge Knowledge is information and skills that are gained through education or experience.

Lag Time The time between when a forecast is prepared and when the resulting action will be completed (often called the operational lag time). For example, if six weeks are required to successfully recruit, train, and assign new CSSs to handle an expected future transaction volume, then the forecast must be prepared at least six weeks earlier (i.e., it has a lag time of six weeks).

Levels The performance required for each metric to meet the requirements of Category 4.0 and as defined in Exhibits 1,2 and 3. Fifty percent [50%] of metrics for each Category 4.0 Item must consistently meet or exceed target $\frac{3}{4}$ of the time periods.

Licensee Companies that are licensed by COPC Inc. to determine compliance with the COPC CX Standard and nominate entities for certification to the COPC CX Standard. They perform audits and reviews using the COPC CX Standard. Licensees must follow specific guidelines to ensure the integrity of the COPC CX Standard and the COPC Inc. Certification Process.

Location In the COPC CX Standard, refers to a place where face-to-face transactions take place, e.g., retail stores, bank branches, customer's home, etc.

Major Changes	Major changes typically involve the coordination of multiple functions or departments and take significant time and/or substantial investment to implement. The appointment of a member of staff as a project manager is a clear indicator a change is seen by the organization as a major change.
Messages	In the Standard, this means the individual interactions between a customer and a bot/chatbot that together make up a conversation of the complete transaction.
Minimum Hiring Requirements	A list of the criteria that a candidate for a KCR job must fulfill if he or she is to be eligible for that role. The list is typically a set of personal attributes that are a combination of prior experience, personality, literacy, numeracy, computer familiarity and ability to be flexible to work the shift pattern required. The list includes skills required to do the job for which training will not be offered by the company (e.g., language capability or ability to type).
Minimum Skills and Knowledge	What an employee who occupies a KCR job must know and be able to do before he or she becomes operational in his or her job. These skills and knowledge must be verifiable and will be dependent upon the job. NOTE: In common usage, this is often shortened to “Minimum Skills”.
Monitoring	See Transaction Monitoring.
Net Promoter Score	The difference between the percentage of customers who are promoters and the percentage of customers who are detractors.
Non-Critical Errors	Inaccuracies that do not cause an entire transaction to be deemed defective. These may include errors in professionalism, soft skills, and some data input errors.
Objective	A specific result that a person or system aims to achieve within a time frame and with available resources. In general, objectives are more specific and easier to measure than goals. Objectives are basic tools that underlie all planning and strategic activities.

Occupancy	An efficiency metric calculated as: $\frac{\text{(transaction handle time)}}{\text{(transaction handle time + available time)}}$ Occupancy is commonly used to show how effectively CSSs are scheduled to work to meet the arrival of transactions.
OJT	On-the-job training.
Outsource Service Provider (OSP)	Third parties that are contracted by Clients to provide services to customers on their behalf. Like CSPs, OSPs encompass most, if not all, types of service environments.
On Time	The percentage of transactions processed within the targeted cycle time.
Paid Time	Paid working time. This typically refers to the hours for which CSSs are paid during their workday. (This excludes paid time off and lunch breaks.)
Performance Management System	The organizational structure, procedures, processes, and resources needed to ensure overall service, quality, revenue, and cost performance, particularly with regards to consistently meeting customer requirements.
Performance Metrics	Measures used by the entity to track performance, particularly of KCRPs (CSP/OSP) and KBPs (VMO). Examples and requirements are presented in <i>Category 4.0 Performance</i> and the exhibits.
Performance Summary Table (PST)	A table summarizing the performance of key output metrics used to calculate the number of metrics consistently meeting target and/or showing sustained improvement (also referred to as the 50/75 rule) required by Item 4.6 <i>Achieving Results</i> .
Precision	See Confidence Interval.
Previous Performance Level	The average of the previous three data points (or the average of the previous data points if fewer than three data points are available).
Proactive Chat	A chat session initiated by the CSP sending an invitation to the customer.



Process Audits, End-to-End	Audits of KCRPs that follow the process from the first process step through the output of the process. These audits often cross multiple departments within the CSP, including those outside the entity, as well as key suppliers.
Productive Time	Time spent by a CSS processing transactions. For blended agents handling both real time and deferred transactions, it will include talk time, hold time, and after call work as well as any time spent handling deferred transactions such as processing emails or making callbacks.
Productivity	An efficiency metric calculated as: (productive time) / (paid time).
Production System	Systems that are used by CSP/ OSP staff to carry out a KCRP. Typically, these include the phone system, CRM systems, knowledgebase, email handling system or any workflow systems. Production systems are fundamental to delivering services to customers but are used by the CSP/ OSP staff rather than the customer.
Program	A program is support provided for a specific product or service for a specific Client. Individual Clients often have multiple programs. These might be services provided to different divisions or departments within the Client organization, a similar service provided for different products, different services provided for the same product, or individual campaigns. Programs should be defined based primarily (although not exclusively) on the Client's and the CSP/OSP/VMO's organization structures. The more distinct the organization structure, the more the entity is likely to have different programs. Thus, an OSP that uses two different teams for one Client probably has two programs for that Client.
Quality	Doing things accurately on the first attempt (e.g., giving the correct answer to an inquiry, inputting an order correctly, and shipping the correct product to the correct address).
Reactive Chat	A chat session initiated by the customer.

Real Time Transactions Real time transactions are typified by:

- There is a live engagement with the customer, and the customer is present throughout the queue time.
- The customer determines when to initiate contact, and the service operation is reacting to this demand.
- The center has a limited time to pick up the transaction before the customer abandons.
- Backlogs are not experienced as the customer abandons if the transaction is not answered in reasonable time frame.

Real time transactions include:

- Inbound customer calls
- Web chat
- Escalations (live transfer of phone calls)
- Person to person customer services

COPC® Recertification Audit Entities certified to the COPC CX Standard must be re-certified on an annual basis. The COPC® Recertification Audit is an abbreviated version of a COPC Certification Audit. See the COPC CX Standard Certification Guidelines and the COPC CX Standard Certification Process for VMOs for more detailed requirements (separate documents).

COPC Registered Auditor An individual who has successfully completed COPC Best Practices for CX Operations Training, successfully completed COPC Auditor Training, and has formally demonstrated his/her ability to apply the COPC CX Standard in the field. Annual testing and skills demonstration are required to maintain *COPC Registered Auditor* status.

Request for... (RFX) A term created by COPC Inc. for any requests made by VMOs to potential OSPs for Information (RFI), Proposal (RFP), or Quote (RFQ).

Request for Proposal (RFP) A document normally prepared by a VMO and sent to OSPs asking them to present a proposal detailing the methods and price to perform the services to be outsourced as described in the RFP.



Requirement There are two definitions of this term as it is used in the COPC CX Standard:

1. Any need that the CSP/OSP/VMO has to fulfill (e.g., respond to emails). Reference is made throughout all the COPC CX Standard to client and customer requirements.
2. An element of the COPC CX Standard that is a subset of an Item. For example, 1.1.1 is a requirement in *1.1 Setting Direction*.

Resolution Resolution is when the customer's problem or issue has been satisfactorily (to the customer) dealt with

Right Party Right Party for Collections is defined as the person who can cure the debt. For Outbound Right Party is the person to be reached.

Sales/ Revenue Income for the Client (or CSP) generated during a customer transaction (e.g., making a product sale or collecting past due amounts).

Schedule Adherence There are multiple definitions of schedule adherence. The numerator and denominator will vary, depending on the definition. For example, comparing actual and scheduled work by time of day and type of work (handling transactions, attending meetings, coaching, on break, etc.).

To illustrate this calculation, assume a CSS's break of 15 minutes is scheduled to begin at 10:00am, but is actually taken between 10:05 am and 10:20 am. The calculation of Schedule Adherence is:

$$[15 \text{ (actual break)} - 5 \text{ (late start)} - 5 \text{ (late return)}] / [15 \text{ (scheduled break)}] = 33\%.$$

Schedule Attainment Schedule attainment is the percentage of FTEs in the Client-required staffing plan that are actually available during a time period. This can be measured in two ways:

1. The percentage of intervals in which the CSP has staffed within the staffing band that has been agreed with the Client. These bands could allow a degree of over and understaffing, and the CSP/OSP does not have to have equal emphasis both above and below the target to reflect a different emphasis on cost or customer experience (e.g., 85% of the intervals must be between 95% and 115% of the requirement).

Or

2. The absolute value of the difference of the number of FTEs in the Client-required staffing plan and the actual number of FTEs available.

On a daily, weekly, and monthly basis, this measurement must include the weighted average (based on the number of Client-required FTE) of schedule attainment for the relevant 30-minute intervals.

To illustrate this calculation, assume the Client-required staffing plan calls for 15 FTE to be available from 10:00 am to 10:30 am.

If 14.5 FTE are available during this interval, Schedule Attainment is calculated as follows:

$$1 - (\text{ABS} (\text{Actual FTE} - \text{Required FTE}) / \text{Required FTE})$$

$$\text{Actual FTE} = 14.5, \text{ Required FTE} = 15$$

$$1 - (\text{ABS} (14.5 - 15) / 15) = 1 - (\text{ABS} (-.5) / 15) = 1 - (.5/15) = 1 - .033 = 96.7\%$$

Scheduling Assigning CSS resources (planned 'roster') by period to meet the estimated loaded demand.

See Demand/Demand Requirement.

Scope of Work (SOW) A definition of requirements created by a VMO and an OSP that clearly describes the work product to be delivered by the OSP.

Service	There are two definitions of this term as it is used in the COPC CX Standard: 1. The speed in which things are done from the customer's perspective. This might be how long it takes to talk to a live agent or how long it takes to receive a response to an email. 2. A specific function that the CSP or VMO has to provide (e.g., Inbound Customer Service, Technical Support, Collections, etc.).
Service Dispatch	Service dispatch is that part of the organization that is responsible for arranging for technicians to visit customers to provide on-site support
Service Journey	The path taken by a customer end to end, interacting with any combination of company contact channels and resources required to resolve a customer request or need.
Service Level	A measurement expressing the percentage of transactions that are responded to in a specified timeframe. For example, 80/30 for a call center means that 80% of the offered calls are or will be answered within 30 seconds. Service level can be a target or a measurement of actual performance.
Service Level Agreements (SLA)	Written contracts or agreements with suppliers of products or services. These usually consist of agreed-upon performance levels and targets.
Service Rate	Total interactions completed using service functionality divided by the total number of transactions eligible for the service. The number of transactions eligible for service is those transactions in which the customer has had a meaningful interaction with the system in an attempt to obtain specific information or a resolution.
Service Request	A service request is another name for an incident or customer issue.
Session Abandonment Rate	The Session Abandonment Rate is a measure of the number of transactions that abandon after a chat dialogue has been established

Shrinkage (Lost Time)	There are multiple definitions of shrinkage. The definition COPC Inc. finds most useful is the estimated amount of scheduled time that will not be realized because of absenteeism, sick/late time (and FMLA), training, coaching, team meetings, etc. that are not included in the work schedule.
Skill-based Routing	A software-controlled ACD function that routes the caller to specific CSSs based upon predetermined parameters and calling conditions (e.g., language capability, call priority, etc.).
Social Media	Tools and applications that are created with the intent to allow an individual to create profiles; to create, develop and share content; and to communicate and connect with one another.
Social Media Networks	Specific sites that are created to facilitate social media activities include sites like Facebook, Twitter, YouTube, and Pinterest.
Specific Attribute	An individual element or component is used to break down overall satisfaction into the elements that create or contribute to satisfaction (e.g., accuracy, timeliness).
Specification Limit	Used where a process is to be managed to a band around target rather than a single target value. The upper specification limit (USL) will determine the highest permitted result, and the lower specification limit (LSL) will determine the lowest permitted result from a process.
Staff Classification	Two distinct staff classifications describe positions (as opposed to the person occupying those positions) from the customer's perspective. • Indefinite staff occupy positions with no known end date. They are employed either by the CSP/OSP/VMO or a staffing or recruiting firm (in which case they are often called "temps"). A position that is occupied during the course of a year by four three-month "temps" is de facto an indefinite position for the purposes of the COPC CX Standard. • Temporary staff occupy positions for which there is a known end date, such as for a holiday rush.



Staff, Contract	Full- and part-time staff on the payroll of a staffing/recruiting agency.
Staffing	Calculating the estimated number of CSS resources by period (regardless of who will actually be assigned) that are required to handle the forecast transaction load (loaded demand). See Demand/Demand Requirement.
Statement of Work (SOW)	See Scope of Work above
Supervisor	The managerial position within a CSP/OSP to which CSS's report (also referred to as first-line management).
Support Staff	The personnel responsible for supporting staff in KCR jobs. This usually includes information systems, information technology, telecom, human resources, schedulers/forecasters, and management.
Support System	Systems that are required to help manage the center. They typically automate a KSP. Examples include forecasting systems, scheduling applications, transaction monitoring databases, reporting software, human resources systems, etc.
Sustained Improvement	Three consecutive data points are better than the previous performance level. The three points do not have to demonstrate successive improvement (i.e., each point does not have to demonstrate higher performance than the previous data point, but all three data points have to be better than the previous performance level). Data points that are better than target will be treated as being better than the previous performance level. The previous performance level is the average of the previous three data points (or the average of the previous data points if fewer than three data points are available).
Systems Functionality	Operation of the system from a customer perspective and not simply hardware availability.
Target	A quantified level of performance for a requirement (e.g., respond to 95% of emails within 24 hours of receipt).
Temporary Staff	Staff occupying positions for which there is a known end date.

Third (3rd) Party Maintainer	A maintenance supplier which is utilized to provide on-site or return to base repair or engineering.
Time on Phone	The actual length of time CSSs are talking on the phone with a customer including hold time (commonly referred to as average talk time). See Utilization and Occupancy.
Transaction Arrival Patterns	The transaction volume arriving in specific time intervals.
Transaction Handle Time	The total time spent handling transactions including talk time (inbound and outbound calls), non-phone time (email, correspondence), and any after call work.
Transaction Monitoring	Reviewing the style, format, professionalism, knowledge, and accuracy of information as it is provided by CSSs to customers (see Item 2.7 <i>Managing Quality</i>). For calls, this is usually performed by remote or side-by-side observation of actual calls. For emails or correspondence, this is usually performed by reviewing the CSSs' written responses to customer inquiries. For field service operations, this is usually performed by reviewing work performed by the CSS or accompanying and observing the CSS. For stores, branches, etc., this is typically performed through direct observation.
Trends	Evaluation of how performance has changed over time.
Unscheduled Time	The number of hours CSSs (or a group of CSSs) are scheduled to work but do not because of unplanned absences - such as illness, tardiness, and last-minute personal days - in a given timeframe. Example: a CSS is absent one workday, takes an unplanned personal day, and is tardy by an hour twice during a 21-day month, totaling 18 hours. This information is used in the absenteeism calculation.
Upstream	Steps in a process or journey that take place earlier than at a given point.
Uptime	The percentage of time systems are available to be used as intended (computer systems, telephone lines, ACDs, and desktop terminals).



Utilization An efficiency metric that represents the time CSSs are engaged in customer interactions or waiting for incoming customer interaction as a percent of the time CSSs are paid (this excludes paid time off and any non-paid breaks). This is calculated as:

$$(\text{transaction handle time} + \text{available time}) / (\text{paid onsite time})$$

Utilization is commonly used to show how effectively CSSs are being managed and how much of their time is truly available to handle customer transactions.

Vendor Vendors are those organizations, external to the entity, that perform a KCRP. These vendors need not be external to the company; other parts of the company that are not part of the entity may also be considered vendors if they perform a KCRP for the entity.

Vendor Management Organization (VMO) VMOs are organizational units or groups of individuals within a company, typically within the Client company, responsible for managing at least a portion of the company's customer experience programs. Typically, VMOs manage OSPs but may also manage CSPs.

Waiver (or Exemption) Required when the OSP is not able to demonstrate competence in one or more Items.

This may be due to:

- Client policy (e.g., forbidding contact with customers to conduct customer satisfaction surveys)
- Deficiencies in Client systems or processes
- Conflict with Client contractual or commercial terms (e.g., low target requirements)
- Client not responding

They are only applicable to the COPC CX Standard for Contact Centers.

Web Chat On a network, real-time exchange of written communication between customers and CSSs. Usually used for technical support, product queries, idea generation or customer satisfaction discussions. Typically, CSSs chat concurrently with two or more customers.