

Chapter 7 – Reporting

It is not enough to implement standards, protocols, and quality assurance procedures. The results of these functions must be captured and reported to staff and management so that actions to address any issues and effect improvements can be initiated. The reporting function must also cover how the information is communicated to customers by partner organizations to ensure that the customer receives information in a consistent manner regardless of which organization provides the information.

Reporting Key Information

Routine reporting is an important function of One-Call/One-Click Centers, and the complexity of the center will determine the reporting format. For example, a simple center may track calls manually and utilize a spread sheet as the reporting format. Conversely, a complex center may have electronic reports generated from the call center software and produce separate quality assurance and performance analysis reports. Some reports will be run daily, some monthly, and some annually. It is important to maintain consistency in when the reports are run for comparative purposes.

The major functions that should be included in reports can be divided into three categories – information that is internal to the call center, information that can be termed inquirer or customer data, and quality assurance information.

Internal Data

- Telephone Service Reports (Generally available within the call center software application if applicable)
 - Number of calls
 - Average speed of answer
 - Service level
 - Handle time (time for calls)
 - Abandon call rate (How many callers hang up before reaching an agent)
 - Categorization of calls (Call Type)
 - Phone
 - Voice Mail
 - Email
 - Call Back

Basics – Reporting

- Number of calls
- Caller Information (depending upon center functions)
- Demographics
- Call Type
- Purpose of call
- Disposition of call
- Quality assurance
- How learned about service

- Web Chat
- Social Media

Customer Data (Some or all of this information may be available within the call center software application)

- Demographics (voluntary)
 - Veterans (Check with regional Veterans organization for guidance in requesting any other information on Veterans) - <http://www.benefits.va.gov/benefits/offices.asp>
 - Service Members and their families
 - Geographic location for service being sought/geographic location for caller if different
 - Male/female
 - Age categories
- Purpose of call
 - Information and Referral (May break-down further to specific type of information requested, e.g., transportation, caregiving, medical, etc.)
 - Ride Scheduling
 - Employment
 - Crisis/Emergency
- How learned about the center (Include the types of outreach and marketing center uses)



If scheduling rides, should track time to return call to customer with information on scheduled ride

- Another organization
- Educational briefing
- Brochure/Poster
- Ad or article
- Word of mouth
- Resource Directory

- Caller specific information (Contact information for customer if ride is being scheduled or counseling is being provided – ensuring compliance with Privacy and HIPAA requirements as applicable)
- Disposition of call
 - Transfer directly to provider
 - Transfer to language line or bilingual staff
 - Provided information on resources
 - Service not available (service gap)
 - Abandoned call – hang up by customer

Quality Assurance Data

-
- Call Monitoring Reports
 - Call center staff (May also include anonymous calls from partner or staff management to center staff presenting hypothetical inquiries)
 - Partner staff (May monitor partner staff to ensure consistency in how information is communicated to customers)
 - Satisfaction Survey Reports
 - Independent review reports
 - Reports on actions taken as result of quality assurance functions
 - Actions taken on service gaps
 - Actions taken as result of Complaints

Analyzing Reports

The Call Center Supervisor is responsible for monitoring the reports that describe the call center daily activities. Reports should be reviewed and analyzed on a daily, monthly and/or annual basis. The center reports provide an opportunity to initiate both short-term and long-term training and improvement activities. Along with management of partner organizations, as appropriate, senior management within the primary organization should review the quality assurance reports.

Analyzing Gaps in Service

Gaps in service will be identified through the daily calls, and it is important to ensure that the protocols for steps that should be taken when these calls are received are followed by monitoring the reports on these calls with staff and with partner organizations. Staff should endeavor to provide additional options for customers, and partner organizations should work together to discuss and implement solutions. It is also a good idea to include customers in the design of the solution. The solutions may take some time to take effect, so regular meetings with partners may be necessary to ensure that the solution is implemented.