Developing a successful scorecard for HR shared services utilising analytics
Introductions

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Deloitte

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HR Services & HRIS VP
The Coca-Cola Company

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Consultant, People and Workforce Analytics
Deloitte
Introduction - scorecards in a SSC / BPO environment
Service centres can play a broad set of roles in delivering scorecards & analytics

Potential Role of SSC / Outsource Provider
- Statistical expertise
- Insight services
- Data visualisation
- Analysis services
- Scorecard maintenance
- Information workflow
- Ad-hoc reports
- Standard reports
- Data management

Value adding insight
- Optimization algorithms
- Advanced forecasting
- Simulation modelling
- Quantitative analyses
- Role-based performance metrics
- Exceptions and alerts
- Slice and dice queries and drill downs
- Management reporting
- Enterprise data management

Sophistication of Scorecard

Predictive
Descriptive

Annual Shared Services & BPO Conference 2013
What makes a great scorecard?
What do you think is the difference between a good and a great scorecard?

- Data in one Place
- Accurate
- Configurable
- Improves Over Time
- Functional
- Shareable

Your scorecard

- User Friendly
- Relevant to Audience
- Timely & Up-to-date
- Trusted & Relied Upon
- Meaningful KPIs
- Enables Decision-Making
### What makes a great scorecard?

What do you think is the difference between a good and a great scorecard?

<table>
<thead>
<tr>
<th>‘Poor’</th>
<th>‘Good’</th>
<th>‘Great’</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Alignment to need</strong></td>
<td><strong>Alignment to need</strong></td>
<td><strong>Alignment to need</strong></td>
</tr>
<tr>
<td>• Audiences, and their requirements, are not defined</td>
<td>• Dashboard audiences are defined</td>
<td>• <strong>Adaptability</strong>: dashboard can be changed as business requirements change</td>
</tr>
<tr>
<td>• Dashboard is not aligned to strategy/business objectives</td>
<td>• Clear understanding of the business objectives and how each KPI measures against these objectives</td>
<td><strong>Structure</strong></td>
</tr>
<tr>
<td><strong>Structure</strong></td>
<td><strong>Structure</strong></td>
<td><strong>Structure</strong></td>
</tr>
<tr>
<td>• Insufficient breadth of metrics</td>
<td>• A mix of factual and strategic metrics</td>
<td>• <strong>Interactive</strong>: multiple views of the data are available; functionality to enable action</td>
</tr>
<tr>
<td>• Lack of supporting context for KPIs</td>
<td>• KPIs are organised in a logical way, and there are a suitable number</td>
<td>• <strong>Dynamic</strong>: can sort KPIs by priority/issue</td>
</tr>
<tr>
<td>• Unclear representation of metrics</td>
<td><strong>Data</strong></td>
<td><strong>Data</strong></td>
</tr>
<tr>
<td>• Lack of consistency in KPIs</td>
<td>• Consistent KPIs, which are seen as credible by stakeholders</td>
<td>• <strong>Granularity</strong>: data can be ‘drilled down’</td>
</tr>
<tr>
<td>• KPIs not seen as credible/accurate</td>
<td>• Metrics are supplemented by other relevant datasets (e.g. Finance)</td>
<td>• <strong>Weighting of metrics</strong>: KPIs can be reprioritised based on relevance to stakeholders, data quality, etc.</td>
</tr>
<tr>
<td>• Timeliness of data refresh is too slow to enable decision-making</td>
<td><strong>Outcomes</strong></td>
<td><strong>Outcomes</strong></td>
</tr>
<tr>
<td>• No ability to make decisions or take action from information presented</td>
<td>• Timely and accurate information allows users to make decisions based on the data, track progress, and identify issues</td>
<td>• <strong>Predictive capability</strong>: future issues can be identified and mitigated</td>
</tr>
<tr>
<td><strong>Outcomes</strong></td>
<td><strong>Outcomes</strong></td>
<td><strong>Outcomes</strong></td>
</tr>
</tbody>
</table>

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What makes a great scorecard?
Let’s explore three elements of a great scorecard…
What do organisations typically measure?
Surveys suggest most organisations measure some of the same things

What can you measure – are these descriptive measures only?

What's meaningful to track for certain outcomes?

Measures like these might provide your ‘solid foundations’


Source: Have you Got Talent? Leading the Boardroom Agenda – Deloitte
How do you know what measures matter most?
When we are measuring people – it is complicated!

An example of complex relationship between people and business outcomes:

- SSC manages training logistics
- HR personnel provide Coaching Programme
- 100 staff deliver coaching
- 100 staff receive coaching
- 500 staff receive coaching

- Coaches generate 15% more recruitment referrals
- Engagement ratings improve among coaches by 4%
- Absence reduced by 2%
- Error rates reduced by 15%
- Compliance improves by 6%
- Average productivity increases by 4%

- Quality of hire considered to have improved
- Time to productivity of new hires improves by 15%
- 16% increase in acceptance of job offers
- 7% increase in new joiners per month

Business outcome: Output increases by 3%

Other factors

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What measures matter most to other organisations?
Here are some examples of measures that made a meaningful impact on business performance…

Some examples of what other companies have measured:

- Annualised turnover per PM rating
- People management level by gender
- Operating expense per total employees
- Training participation
- Gaps linked to trainings
- Monthly FTE availability
- Contract revenue
- FTE cost
- Resource required by discipline
- FTE by business unit
- Customer handling targets
- Mystery shopper results
- % people under formal review/exited
- % of total reward attributed to improved performance
- % positive from Engagement Indices
- First call resolved rate
- Transfer to employee
- Average talk time
- Average hold time
- Abandon in queue
So how can Analytics help?
Let analytics do the hard work for you...

- **Identify connections within large, complex data sets**
- **Flag up values that break tolerances**
- **Identify patterns and trends**
- **Create predictive views of the future**

Add value for the end-user

- **Personalise - to individual role requirements**
- **Interactive – power of analysis and insight in the hands of end-users**
- **Dynamic - to show data that matters most ‘today’**
- **Live – able to drill down to find root causes**
Coca-Cola Case Study

Karla Younger – The Coca-Cola Company
A quick look at The Coca-Cola Company

World’s largest beverage company and World’s most valuable brand

- Founded in 1886
- 2012: Revenues of $48B with over 145K employees
- Over 500 brands consumed in over 200 countries
- ~200 Million customers every week
- ~1.8 Billion servings consumed daily

15 Billion dollar brands
Our value chain

Concentrate from The Coca-Cola Company

Ingredients & Packaging

Production of Finished Products

Warehouse & Transport

Vending Machines & Coolers

Customers

Consumers
Historical background of HR shared services

Initiated Payroll consolidation of 17 decentralized payroll shops (covering 27 business divisions) to one. Completed half of the lift and shift by 12/31/01

2001
- Initiated Payroll consolidation
- Completed remaining U.S. payroll lift and shift

2002
- Deployed HR benefits call center

2003
- Deployed SAP Payroll for U.S.
- Deployed SAP HR and Payroll for Canada

2004
- Completed U.S. payroll lift and shift
- Deployed SAP HR and Payroll for Canada

2005
- Deployed HR benefits call center
- Deployed SAP Payroll for U.S.

2006
- Completed half of the lift and shift by 12/31/01

2007
- Deployed SAP HR and Payroll for Canada
- Deployed SAP HR for U.S.
- Deployed SAP Payroll for U.S.
- Centralized HR master data and org mgmt.

2008
- HR completed Hackett best practice study / baseline
- Deployed 3 month wave approach for HR Service Delivery model

2009
- Deployed 3 month wave approach for HR Service Delivery model
- HR initiated Optimization project

2010
- CCE split with Europe, rewired processes for day 1 integration
- Deployed 3 month wave approach for HR Service Delivery model

2011
- Integrated bottler for HR and Payroll
- Integrated bottler for HR and Payroll

2012
- Integrated bottler for HR and Payroll

Today
- Payroll reporting line
- Finance
- HR
- HR completed Hackett best practice study / baseline
- Deployed 3 month wave approach for HR Service Delivery model
- CCE split with Europe, rewired processes for day 1 integration
- Integrated bottler for HR and Payroll
- Finance
- HR
- HR initiated Optimization project
- CCE split with Europe, rewired processes for day 1 integration

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# Key facts – 2012 highlights

## Direct Support

### Inquiry volume
- > 509k inquiries-12% PYR
  - 64% phone
  - 27% email
  - 9% mail/fax/web
- > 66% first call resolved
- > 75% favorable customer satisfaction

### Service center operations
- 8am – 8pm Eastern
- Multiple language support
- North America support

## Self Service Support

### Self Service
- > 87k ESS- 9% PYR
- > 26k MSS-11% PYR
- > 3.8M portal hits-18.6% PYR
- 92% electronic payslip
- 94% direct deposit
- 38% W-2’s, 24% T-4’s

### Interactive IVR
- >11.5k candidate/recruiting vendor inquiries resolved by tier 0
- >83k password reset inquiries directed to IT help desk

## Key Stats

- 70,000 employees
- > 500 summary plan descriptions
- 1.76M payroll checks produced
- 672 severance packages
- U.S. (48 states) and Canada
- 2012 hires: 20,636
  - Internal 5,901
  - External 14,735
Leverage a fact based approach to measure performance and accountability

We apply various measures …

- Customer satisfaction
- Aged cases
- Cycle time
- Speed to answer
- Abandon rate
- Quality assurance results
- Forecast accuracy
- Transactional accuracy
- Self service inquiries
- Portal hits

... and consistently track performance against them

Contact center performance

Customer satisfaction survey

Aged cases
## Monthly Metrics

<table>
<thead>
<tr>
<th></th>
<th>Goal</th>
<th>Current Month</th>
<th>Prior Yr Month</th>
<th>Status Month</th>
<th>YTD</th>
<th>Status YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HeRe! Team Calls</strong></td>
<td>85.0%</td>
<td>89.0%</td>
<td>75.0%</td>
<td>G</td>
<td>85.0%</td>
<td>G</td>
</tr>
<tr>
<td>- 85% of calls answered in 30 seconds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>First Call Resolved</strong></td>
<td>65.0%</td>
<td>66.0%</td>
<td>67.0%</td>
<td>G</td>
<td>61.0%</td>
<td>Y</td>
</tr>
<tr>
<td>- Considered resolved with respect to the call on the first contact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>HeRe! Team Benefit Calls</strong></td>
<td>85.0%</td>
<td>87.0%</td>
<td>82.0%</td>
<td>G</td>
<td>75.0%</td>
<td>Y</td>
</tr>
<tr>
<td>- 85% of calls answered in 30 seconds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>First Day Resolved</strong></td>
<td>75.0%</td>
<td>76.0%</td>
<td>74.0%</td>
<td>G</td>
<td>72.0%</td>
<td>Y</td>
</tr>
<tr>
<td><strong>Cycle Resolve Time</strong> (business days) – HR Services Only</td>
<td>2.0</td>
<td>1.3</td>
<td>1.5</td>
<td>G</td>
<td>1.9</td>
<td>G</td>
</tr>
<tr>
<td><strong>Customer Satisfaction</strong> – 5 point scale</td>
<td>4.0</td>
<td>3.8</td>
<td>N/A</td>
<td>Y</td>
<td>3.6</td>
<td>Y</td>
</tr>
</tbody>
</table>

## Self Service Transactions

<table>
<thead>
<tr>
<th></th>
<th>Current Month</th>
<th>Prior Yr Month</th>
<th>Status Month</th>
<th>YTD</th>
<th>Prior YTD</th>
<th>Status YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Employee</strong></td>
<td>7,126</td>
<td>7,745</td>
<td></td>
<td>60,717</td>
<td>55,209</td>
<td></td>
</tr>
<tr>
<td><strong>Manager</strong></td>
<td>2,334</td>
<td>2,465</td>
<td></td>
<td>16,767</td>
<td>15,842</td>
<td></td>
</tr>
<tr>
<td><strong>Portal Hits</strong></td>
<td>340,959</td>
<td>277,289</td>
<td></td>
<td>2,481,178</td>
<td>2,010,865</td>
<td></td>
</tr>
</tbody>
</table>
First day resolved – August 2012

**Goal**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Month</td>
<td>76.0%</td>
</tr>
<tr>
<td>Prior Year Month</td>
<td>73.7%</td>
</tr>
<tr>
<td><strong>Status</strong></td>
<td>G</td>
</tr>
<tr>
<td>YTD</td>
<td>72.4%</td>
</tr>
</tbody>
</table>

**Monthly Recap**

- First Day Resolved includes all items resolved within the day, which includes First Call Resolved and First Email Resolved.
- Email case creation is currently at the turnaround of 12 hours.
- Portal request volume continues to climb and email volume is declining.

**Aug-12**

<table>
<thead>
<tr>
<th>Assigned Group</th>
<th>Activities Resolved &lt; 1 day</th>
<th>Total Activities Resolved</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUSTOMER SERVICE</td>
<td>14,071</td>
<td>14,217</td>
<td>99.0%</td>
</tr>
<tr>
<td>PAYROLL (GARNISHMENTS)</td>
<td>393</td>
<td>401</td>
<td>98.0%</td>
</tr>
<tr>
<td>FILES MANAGEMENT (CAN-TORONTO)</td>
<td>379</td>
<td>406</td>
<td>93.3%</td>
</tr>
<tr>
<td>RETURN TO WORK</td>
<td>5,476</td>
<td>6,153</td>
<td>89.0%</td>
</tr>
<tr>
<td>PAYROLL (CANADA REGULAR PAY)</td>
<td>282</td>
<td>321</td>
<td>87.9%</td>
</tr>
<tr>
<td>AUTO ALLOWANCE ADMINISTRATOR</td>
<td>222</td>
<td>255</td>
<td>87.1%</td>
</tr>
<tr>
<td>PRODUCTION CENTER</td>
<td>897</td>
<td>1,062</td>
<td>84.5%</td>
</tr>
<tr>
<td>FULFILLMENT MASTER DATA</td>
<td>74</td>
<td>98</td>
<td>75.5%</td>
</tr>
<tr>
<td>FILES MANAGEMENT (US-HARAHAN)</td>
<td>919</td>
<td>1,257</td>
<td>73.1%</td>
</tr>
<tr>
<td>FILES MANAGEMENT (US-TEMPE)</td>
<td>799</td>
<td>1,125</td>
<td>71.0%</td>
</tr>
</tbody>
</table>
Cycle resolve time – August 2013

Volume down 8,000 cases YTD
• Changes to call routing is directing customers to correct group

Cycle Time reduced YTD from 1.9 days to 1.2 days
• Educating customer during calls
• Intranet improvement
• Change in HR Admin Management
• Measurement and goals established
• Empower associates
• Internal shift of work to improve cycle times and customer experience

<table>
<thead>
<tr>
<th>Month</th>
<th>2013 Activities Resolved</th>
<th>2013 Cycle Resolve Time</th>
<th>2012 Activities Resolved</th>
<th>2012 Cycle Resolve Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>30,073</td>
<td>1.33</td>
<td>29,772</td>
<td>1.62</td>
</tr>
<tr>
<td>February</td>
<td>27,248</td>
<td>1.69</td>
<td>28,734</td>
<td>2.27</td>
</tr>
<tr>
<td>March</td>
<td>26,466</td>
<td>1.28</td>
<td>29,086</td>
<td>2.19</td>
</tr>
<tr>
<td>April</td>
<td>26,090</td>
<td>1.17</td>
<td>29,013</td>
<td>2.44</td>
</tr>
<tr>
<td>May</td>
<td>29,117</td>
<td>1.16</td>
<td>29,779</td>
<td>2.16</td>
</tr>
<tr>
<td>June</td>
<td>26,015</td>
<td>1.33</td>
<td>26,971</td>
<td>1.78</td>
</tr>
<tr>
<td>July</td>
<td>26,797</td>
<td>0.88</td>
<td>25,850</td>
<td>1.33</td>
</tr>
<tr>
<td>August</td>
<td>26,653</td>
<td>0.82</td>
<td>27,084</td>
<td>1.33</td>
</tr>
<tr>
<td>Totals</td>
<td>218,459</td>
<td>1.21</td>
<td>226,289</td>
<td>1.90</td>
</tr>
</tbody>
</table>
Employee self service – August 2012

Type of Transactions Completed HeRe! Online

- Bank Details – direct deposit
- Taxes – federal and state
- Address – permanent and mailing
- Emergency contact information
- Preferred e-mail address
- Known as or nickname

<table>
<thead>
<tr>
<th>Tax Statement</th>
<th>Electronic Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>2010: 34% 2011: 38%</td>
</tr>
<tr>
<td>Canada</td>
<td>2010: 20% 2011: 24%</td>
</tr>
</tbody>
</table>

Monthly Recap /Improvements/Project Updates

- 8.1% increase in transactions from prior year month
- 10.3% increase in ESS transactions YTD from prior year

- ESS Enhancement - Contacting the HeRe Team via the intranet
  - Ability to open a case on behalf of yourself or another associate
  - Ability to auto-route cases to functional groups
  - Ability to add attachments to the request
  - Requestor will receive case number associated with the inquiry upon submission of case
  - Ability to track the status of your cases
  - Employees able to view cases that they initiate in the past 90 days online via the My Profile page

ESS Transactions

<table>
<thead>
<tr>
<th>ESS Transactions</th>
<th>Volume</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Month</td>
<td>7,126</td>
</tr>
<tr>
<td>Prior Year Month</td>
<td>7,745</td>
</tr>
<tr>
<td>Status</td>
<td></td>
</tr>
<tr>
<td>YTD</td>
<td>60,717</td>
</tr>
</tbody>
</table>
Currently reporting volumes and percent change over prior year

August 2013 EIC Activities

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
<th>Volume Inc/(Dec)</th>
<th>Percentage Inc/(Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td>EIC Activities Created</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MTD</td>
<td>30,756</td>
<td>35,531</td>
<td>(4,775)</td>
<td>-13.4%</td>
</tr>
<tr>
<td>YTD</td>
<td>255,813</td>
<td>287,689</td>
<td>(31,876)</td>
<td>-11.1%</td>
</tr>
<tr>
<td>YTD % of Volume</td>
<td>NA</td>
<td>NA</td>
<td>-13.4%</td>
<td>-11.1%</td>
</tr>
<tr>
<td>EIC Activities Resolved</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MTD</td>
<td>30,847</td>
<td>35,320</td>
<td>(4,473)</td>
<td>-12.7%</td>
</tr>
<tr>
<td>YTD</td>
<td>255,587</td>
<td>288,384</td>
<td>(32,797)</td>
<td>-11.4%</td>
</tr>
<tr>
<td>YTD % of Volume</td>
<td>NA</td>
<td>NA</td>
<td>-12.7%</td>
<td>-11.4%</td>
</tr>
</tbody>
</table>

By Channel

<table>
<thead>
<tr>
<th>Channel</th>
<th>2013</th>
<th>2012</th>
<th>Volume Inc/(Dec)</th>
<th>Percentage Inc/(Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Phone</td>
<td>15,621</td>
<td>19,258</td>
<td>(3,637)</td>
<td>-18.9%</td>
</tr>
<tr>
<td>E-mail</td>
<td>9,550</td>
<td>12,466</td>
<td>(2,916)</td>
<td>-23.4%</td>
</tr>
<tr>
<td>Web Request</td>
<td>4,411</td>
<td>3,038</td>
<td>1,373</td>
<td>45.2%</td>
</tr>
<tr>
<td>Fax</td>
<td>595</td>
<td>370</td>
<td>225</td>
<td>60.8%</td>
</tr>
<tr>
<td>Mail/Internal</td>
<td>579</td>
<td>399</td>
<td>180</td>
<td>45.1%</td>
</tr>
<tr>
<td>Totals</td>
<td>30,756</td>
<td>35,531</td>
<td>(4,775)</td>
<td>-13.4%</td>
</tr>
</tbody>
</table>

Self Service

<table>
<thead>
<tr>
<th>Service</th>
<th>2013</th>
<th>2012</th>
<th>Volume Inc/(Dec)</th>
<th>Percentage Inc/(Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee</td>
<td>7,980</td>
<td>7,126</td>
<td>854</td>
<td>12.0%</td>
</tr>
<tr>
<td>Manager</td>
<td>4,046</td>
<td>2,334</td>
<td>1,712</td>
<td>73.4%</td>
</tr>
<tr>
<td>Portal Usage</td>
<td>301,105</td>
<td>340,959</td>
<td>(39,854)</td>
<td>-11.7%</td>
</tr>
</tbody>
</table>

Total Usage

<table>
<thead>
<tr>
<th>2013</th>
<th>2012</th>
<th>Volume Inc/(Dec)</th>
<th>Percentage Inc/(Dec)</th>
</tr>
</thead>
<tbody>
<tr>
<td>301,105</td>
<td>340,959</td>
<td>(39,854)</td>
<td>-11.7%</td>
</tr>
</tbody>
</table>

Next step is to report tier contacts (0, 1, 2, 3) and set targets and action plans against shifts to the lowest tier
Driving tier optimization

Currently focusing improvements in lower tiers.

Focus Areas

- Portal Functionality/Effectiveness
  - Information Availability
  - Transaction Automation
  - Overall User Experience and Ease-of-Use
- Web Analytics/Customer Feedback for continuous improvement
- Proactive Outbound Customer Communications
- Effective Queuing and Selective Tier 1 Job Specialization
- Knowledge Base Effectiveness
- Knowledge Management
- Continuous Agent Training and Coaching
- Relentless focus on moving activities into the lowest satisfactory tier
## Future metrics

### Financial savings
- Cost per contact
- HR SSC cost/total HR cost
- Planning and budgeting accuracy
- Customer base/HR SSC FTE's
- HR SSC cost/customer base
- Capacity tracking

### Customer/Stakeholder Satisfaction
- Key stakeholder satisfaction
- By Customer Service Representative
- By population group: new hires, retirees, Canada
- Measure cases closed that were not resolved

### Process Management
- Rework reduction
- Process control points
- Knowledgebase effectiveness
- Cycle time trends
- Activity based costing
- Cases touched or raised multiple times

### People
- Engagement
- Retention
- Attrition
- Training hours
- Promotions
- Developmental opportunities
What’s next?

• Mobility
  • Demographic change
  • Expand access to portal and self service on mobile devices

• Analytics
  • Direct access for managers to business intelligence
  • Dashboards from multiple data sources
  • Predictive/patterns/heat maps

• Social networking
  • Collaboration
  • Customer feedback
  • Crowd sourcing
Final Thoughts
Typical obstacles … and common myths…
How to get it right in practice?

- Educate, educate, educate
- Get the best from the data you have
- Form a cross-functional team
- Address priority business issues
- Start small / pilot
- Demonstrate the ROI
- Learn lessons from others
Conclusion and recommendations

- Combining scorecards with analytics creates a powerful tool to generate insights and understand relationships.
- The relevant measurements are highly dependent on the organisation – what works for one might not be meaningful to others.
- Each company needs to reveal what metrics really count from the perspective of business outcomes.
- Analytics helps organisations ‘see through’ the complexity of relationships and shed light on intertwined impacts.
- The soft and hard measures can therefore be defined as distinctive yet their associated effects may be recognised.
Questions?
Thank you!

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Want to stay in touch?
• Contact us directly
• Come to Deloitte’s Workforce Planning and Analytics client networking group
• Join the BPO SSC LinkedIn group
Appendices
Making a difference through analytics
Top-performing companies are three times more likely than lower performers to be sophisticated users of analytics

The NHS can forward plan the people they need in every role across their 1m+ workforce, predict skills gaps and address pro-actively.

A major multinational knows the business impact of training spend across 20,000 staff and can make decisions accordingly.

A global beer company can identify the best recruits for each of their 10 business units before they hire them (and can do the same for every potential promotion, transfer, etc).

An international recruitment company uses semantic search to improve the matching of job-hunters to vacancies, measurably improving hire quality and acceptance rates while reducing cost per hire.

These businesses know the impact of each £ spent on people.

These organisations can quantify the contribution of HR.
Example of descriptive reporting
The traditional way of visualising HR SSC data delivers information required by different audiences to enable them to fulfil organisational responsibilities.

- **Past and present views**
- **No immediate sense of issues**
- **Less interactive**
- **Standard descriptive reporting – limited prioritisation**
- **Lack of granularity**
- **More static**
Example of effective scorecards

The analytical approach to presenting data allows for increased adaptability and more effective decision making.

- Immediate sense of issues and priorities: RAG, ability to set thresholds
- Interactive
- Drill down options for further information
- Clear view of lead indicators
- Predictive capability

Management dashboard:
- A collection of performance indicators
- The indicators are connected to SharePoint lists data from anywhere within the root website
- The indicators are dynamically updated when the list data is modified

- How to build the dashboard
- Design the dynamic charts
- Connect them to the lists

Read more.
Effort versus Value

Factors that will impact your ‘effort’ margin
- Complexity of the exam question
- The breadth of the data required
- The availability of the data
- Data mining/level of analysis required
- The technology required to support the initiative
- Stakeholder engagement required – within Professional Development and beyond
- Time and effort required from internal resources
- Capabilities and skills required to support the initiative (both in the team and across the business)
- External support/consultancy advice required

Factors that will impact your ‘value’ margin
- The tangible impact or influence on your Value Drivers or Improvement Levers – i.e. Increasing market share in emerging markets
- The ability for the intervention to reveal or elucidate something about your Improvement Levers
- The perceived value from your key senior stakeholder groups
- The potential cost savings that action as a result of the interventions could contribute to
- The potential to improve productivity or performance of the organisation
## Dashboard Performance Assessment (1/3)

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Value</th>
<th>Calculation</th>
<th>Deloitte Benchmark *</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voluntary Turnover Rate</td>
<td>Attrition rate of service centre employees (that is, % of all employees leaving voluntarily)</td>
<td>Turnover should be minimised as it is costly for the business and disrupts business continuity. A high or rising voluntary turnover rate may indicate people issues such as employee dissatisfaction or uncompetitive employment conditions.</td>
<td>Total voluntary leavers divided by the total number of service centre employees, expressed as a percentage</td>
<td>Europe: 0-4%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>USA: 6%</td>
<td>USA: 6%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Asia: 21%</td>
<td>Asia: 21%</td>
</tr>
<tr>
<td>Employee Satisfaction</td>
<td>Survey of Service Center team members' satisfaction within their work environment</td>
<td>Helps understand qualitative aspects of internal satisfaction, which is very often linked to performance. May identify training and technology / infrastructure enhancement needs</td>
<td>Average score of internal survey results – often collected as part of existing HR survey in the organisation</td>
<td>85% with an average score of 4.25 on a 5 point scale</td>
</tr>
<tr>
<td>Call Quality and Accuracy Monitoring</td>
<td>Accuracy of responses and customer service skills as assessed during random call sampling of the Service Center team members. Note: this includes both inbound and outbound calls.</td>
<td>Provides an ad-hoc qualitative score by Representative. Helps in ascertaining training score for the Service Center team members.</td>
<td>Score calculated as a percentage based on a list of criteria completed by a supervisor</td>
<td>95%</td>
</tr>
<tr>
<td>HR Customer Service Survey</td>
<td>Customer responses to a survey querying their satisfaction with HR services provided</td>
<td>Customer feedback provides insight into the qualitative aspects of customer satisfaction. May identify training and technology/infrastructure enhancement needs.</td>
<td>Ticket-based survey</td>
<td>85% with an average score of 4.25 on a 5 point scale</td>
</tr>
<tr>
<td>Call Abandonment Rate</td>
<td>Number of callers that hang up after 10 seconds (assumed due to long wait times)</td>
<td>Call abandonment rate may indicate a staffing or scheduling issue.</td>
<td>The number of calls that are abandoned (10 seconds) divided by the total number of calls logged on the phone system, expressed as a percentage</td>
<td>4%</td>
</tr>
<tr>
<td>Average Speed of Answer (ASA)</td>
<td>Time elapsed before customer call is answered - while a call is placed in queue for the next available Representative.</td>
<td>Provides average wait time of customers. Provides input to staffing strategies.</td>
<td>Average wait times for all calls received during a certain period. Calls will be timed from the moment they enter the queue (or are transferred) until they are answered.</td>
<td>80% in 45 seconds</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Value</td>
<td>Calculation</td>
<td>Deloitte Benchmark*</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td>---------------------</td>
</tr>
</tbody>
</table>
| Case Resolution Rate (or Ticket Resolution Rate) | Percentage of cases resolved compared to the total number of tickets reported for any given time period. | Measures the ability of the Service Center to resolve cases relative to the total amount of cases received. | Cases resolved divided by Tickets reported (for any given time period), expressed as a percentage | Min: 83%  
Average: 95%  
Max: 100% |
| Case Cycle Time (Or Ticket Resolution Time) | Percentage of cases resolved within the time limit that is agreed with the customer through a service level agreement or other document. This includes both query handling and transactional activities performed by the service centre | Measures the time from opening a ticket, escalating it, and resolving it. Helps in assessing process efficiency and staffing. Useful to assess alongside the Case Resolution Rate. | Number of cases resolved within the agreed time limit divided by the total number of cases, expressed as a percentage. | Min: 87%  
Average: 93%  
Max: 99.5 |
| First Call Resolution and First Contact Resolution | Percentage of queries received that are resolved without being escalated | Measures the ability of Service Center Representatives to resolve issues at Tier 1  
Helps in determining training and knowledge base needs. | The total number queries resolved during the first contact with a Service Center Representative divided by the total number of queries. | 70% |
| % Cases by Channel                          | The percentage of cases reported for any given time period, by channel (ESS, phone, email, etc.) | Measures adoption rate of self service within the workforce. May identify possible training areas and groups reluctant to change | Total number of transactions per channel divided by total number of transactions | 95% ESS |

* Benchmarks are from Deloitte experience of HR shared service centre operations, unless otherwise stated
### Dashboard Performance Assessment (3/3)

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
<th>Value</th>
<th>Calculation</th>
<th>Deloitte Benchmark*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Service Centre FTEs and labour cost</td>
<td>The total number of employees in the service centre and the total related labour cost for the reporting period</td>
<td>This figure allows the calculation of Service Centre staff per employee, cost per employee, etc.</td>
<td>Total individuals on payroll for a given period, and the total amount paid in that period</td>
<td>SSC FTE per FTE&lt;br&gt;Min: 65&lt;br&gt;Average: 805&lt;br&gt;Max: 3726&lt;br&gt;&lt;br&gt;Global Benchmarking centre (FSI only), in $ USD:&lt;br&gt;Cost by SSC HR FTE&lt;br&gt;Min: $27.125&lt;br&gt;Average: $84.703&lt;br&gt;Max: $131.071&lt;br&gt;&lt;br&gt;Global Benchmarking centre (FSI only), in $ USD:&lt;br&gt;SSC cost per employee&lt;br&gt;25th - $157&lt;br&gt;75th - $566&lt;br&gt;&lt;br&gt;NOTE - there are large differences in labour cost depending on the SSC location</td>
</tr>
<tr>
<td>Year on year cost reduction</td>
<td>The year on year reduction in costs by providing services utilizing greater efficiencies, eliminating unnecessary procedures or, in some tickets, discontinuing services.</td>
<td>Helps identify areas that drive cost reduction for the Solution Center organization and manage budget.</td>
<td>Sum of savings identified by the Continuous Improvement efforts divided by the budget.</td>
<td>Min : 4%&lt;br&gt;Average : 7.9%&lt;br&gt;Max : 17%&lt;br&gt;&lt;br&gt;One of the critical success factors for a longer term HR SSC strategy is the ongoing investment made to improve the effectiveness and efficiency of the HR SSC and even the wider HR administrative function.</td>
</tr>
<tr>
<td>Metric</td>
<td>Description</td>
<td>Value</td>
<td>Calculation</td>
<td></td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>------------------------------</td>
<td>----------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Number of transactions</td>
<td>Number of transactions that occur in the centre</td>
<td>Indicates the amount of processes the centre deals with</td>
<td>Number of transactions recorded in centre</td>
<td></td>
</tr>
<tr>
<td>Transaction errors</td>
<td>Percentage of transactions that contain errors</td>
<td>Measures the accuracy and efficiency of processes</td>
<td>(transactions with errors / all transactions) *100</td>
<td></td>
</tr>
<tr>
<td>Quality of notifications and hand-offs internally</td>
<td>Percentage of wrong notifications and hand-offs containing errors with HRBPs and CoEs</td>
<td>Measures the internal efficiency of interactions</td>
<td>(wrong notifications or hand-offs with errors / all interactions) *100</td>
<td></td>
</tr>
<tr>
<td>Local variances</td>
<td>Percentage of step-outs/local variances per global process</td>
<td>Measures the extent of global standardisation</td>
<td>(global processes with local variances / all global processes) *100</td>
<td></td>
</tr>
<tr>
<td>Deviations to documented processes</td>
<td>Percentage of deviations to documented processes per month compared to total cases processed</td>
<td>Measures whether processes on a day-to-day basis adhere to guidelines</td>
<td>(processes deviations / all cases processed) *100</td>
<td></td>
</tr>
<tr>
<td>Workflow in progress</td>
<td>Amount of workflow in progress at the end of each day</td>
<td>Measures the efficiency to close all workflow and hand-off work in a given day</td>
<td>Number of ongoing tasks or activities at the end of the workday</td>
<td></td>
</tr>
<tr>
<td>Change requests</td>
<td>Number of change requests raised per year per employee</td>
<td>Indicates if change management processes are being used and if the level of change taking place i.e. too much change could lead to increased complexity</td>
<td>Number of change requests raised per year per employee</td>
<td></td>
</tr>
<tr>
<td>Resolution time for change requests</td>
<td>Time taken to resolve change requests</td>
<td>Measures the effectiveness to implement change when needed</td>
<td>Number of days to resolve change requests</td>
<td></td>
</tr>
<tr>
<td>Acceptance rate of change requests</td>
<td>Percentage of change requests that are accepted to be signed off</td>
<td>Measures if the requested change requests are relevant or actionable</td>
<td>(Change requests accepted / all requests) *100</td>
<td></td>
</tr>
<tr>
<td>Manual errors</td>
<td>Number of manual errors in online forms</td>
<td>Measures accuracy of online forms and the need to make adjustments on a constant basis</td>
<td>(forms with manual errors / all forms) *100</td>
<td></td>
</tr>
<tr>
<td>Utilisation of technology by staff</td>
<td>Percentage of staff able to use full capacity of technology systems</td>
<td>Measures the efficiency of staff to utilise technology</td>
<td>(Staff able to use full capacity of technology / all staff) *100</td>
<td></td>
</tr>
<tr>
<td>Rate of technology availability</td>
<td>Rate at which staff case access and use technology to facilitate their work</td>
<td>Measures whether manual work is needed</td>
<td>(Working time when technology is available / all working time) *100</td>
<td></td>
</tr>
</tbody>
</table>