



## Introduction to Snapshotz Online



### What is Snapshotz Online?

North American Certified Partner



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## 1.0 What is Snapshotz Online?

Snapshotz is primarily a management tool for customer service / contact center / call centers. Primary uses are:

1. The tool serves as a dashboard for the health of the center
2. A reference for best practice guidelines - A management bible for customer service
3. A task Management tool specific to contact center management and not available with any other application or programme.
4. Team and location comparison tool
5. Planning tool to conduct SWOT analysis
6. Review an performance monitoring tool for comparison from period to period
7. Reporting tool for senior management and boards
8. The tool also has benchmarking capability

### ***The Snapshotz advantage - growing Customer Service as a Strategic Asset***

Easy to use Customer Service management tool at your fingertips	➔	Information and practices drawn from published customer service management frameworks the world over. ISO 9001, ITIL, contact center associations, Government regulations, research supplied by vendors in the applications and infrastructure space, Consultants and other bodies, management and HR organisations
Task Management tool specific to contact center management not available with any other application or programme	➔	The task assignment function enables the key tasks identified during the Snapshotz Online assessment to be made a living document with KPI's attached to it.
Team benchmarking, comparison and management tool specific to the contact center	➔	Any completed Snapshotz Online assessment can be used compare changes from period to period
When Snapshotz Online assessments are complete, Snapshotz reports identifies key focus areas and assists with prioritizing tasks with organizational objectives in mind	➔	A minimum of 4 valuable reports will be generated plus the report with suggested actions as specific to the requirements of the scope
Capture and grow management knowledge in relation to the organisation with Snapshotz Online	➔	The Snapshotz tool enables the IP to be retained within the organisation by capturing current status across the 29 sections and 620 plus variables that are managed within any contact centre or customer service environment
Provides benchmarks against 400 plus organisations	➔	Access to resources on a worldwide basis covering technology and every aspect and variable within the contact centre



Snapshotz is a checklist \*1 that has developed and evolved as a tool to conduct an assessment or audit \*2 of a contact centre or customer service environment.

The checklist has been developed over 8 years from Information and practices drawn from:

1. Contact centers / customer service centers cover all the major verticals\*3
2. Published or privately available customer service management frameworks across the world - ISO 9000 / 1, ITIL, contact center associations
3. Government regulations from The UK and EEC, North America, Australia and NZ.
4. Research supplied by vendors in the applications and infrastructure, cloud computing, unified communications, CRM technologies
5. Management consultants, academic institutions and HR organisations
6. Feeds from IDC, Gartner and Frost and Sullivan, Forester Research
7. Continuous feedback loop woven into the tool as organisations employ the tool.

\*1 To review a detail of the sections and content covered by the Snapshotz Online audit see Table 110 on page 7 of this document.

\*2 See Table 210 on page 9 of this document - Steps in a formal audit process and the benefits of the Snapshotz Online Audit tool in supporting the audit process.

\*3 Major verticals covered by Snapshotz follow the standard industrial classification and encompass the following:

A – Agriculture, forestry, fishing and hunting	B – Mining
C – Manufacturing	D – Electricity, gas and water supply
E – Construction	F – Wholesale trade
G – Retail trade	H – Accommodation, cafes and restaurants
I – Transport and storage	J – Communication services
K – Finance and insurance	L – Property and business services
M – Government administration	N – Education
O – Health and community services	P – Cultural and recreational services

Personal and religious services are currently industry sectors not amongst customer service centers contributing to the tool.

## 1.0 What is Snapshotz Online? Continued...

An important facet is that the checklist is constantly being reviewed and updated by managers who currently manage a contact center. This ensures that the checklists remain usable and not an academic exercise for practicing managers.

The distinction between Snapshotz and many other assessments or audits provided by management consultants and vendors is that Snapshotz provides a holistic approach to assessment.

The key philosophy is that all elements of the contact center combine to make a whole and must be understood and managed accordingly to achieve benefits for customers, the organization and customer service employees.

Focusing on specific areas i.e. operational metrics, service measures, budgets, technology may be adequate to drive efficiency but greater and sustainable effectiveness can only be achieved by combining and managing all 29 major areas within the contact center customer service environment.

Technically, Snapshotz Online is a 'Software as a Service' (SaaS) offering and only browser software, e.g. Internet Explorer is required to be installed on the customer's pc with a connection to the internet.

Snapshotz Online customers have no hardware or software to buy, install, maintain, or update. Access to the application is easy: All required is an Internet connection.

A secure audit engine accessed through a user friendly web interface sits at the hosted location. Further to ensure data is secure; customers' access their data through a secure connection.

## 2.0 How the Snapshotz ratings are developed

Beginning first with input of assessments from 20 organisations in 2003 and currently over 400, a rating and weighting system has been developed.

The organisations from which the Snapshotz Online tool derives the basis for weighting cover all of the following industries except for customer service centres in the personal service sector.

The industry verticals covered are Agriculture, Forestry, Fishing and Hunting & Mining, Manufacturing, Electricity, Gas and Water Supply, Construction, Wholesale Trade, Retail Trade, Accommodation, Restaurants, Transport and Storage, Communication Services, Finance and Insurance, Property and Business Services, Government Administration and Defence, Education, Health and Community Services, Cultural and Recreational Services.

Each variable is given a weighting based on

1. The importance of the variable to the functioning of the contact centre. Whilst calculations go into the deriving the score for each subsection and section, the rationale and weighting are easy to follow.
2. Legal requirements that are universal and adjustable based on Geographic region
3. Weightings and Ratings are constantly reviewed and adjusted when perceptible shifts occur and other indicators such as government regulations or emergence of new metrics such as monitoring customer complaints on social media

It must be noted that ratings or weighting are not applied to operational metrics, wage costs or other costs. Reports for benchmarking against such metrics can be requested separately. The

rationale being metrics used across the different industries / verticals vary, including metrics used in the different geographic regions of the world.

### 3.0 Scoring - How the Snapshotz Score or benchmark is derived

The Snapshotz Score is the average of the score achieved by the top 25% of those organisations employing Snapshotz.

It must be noted that the Snapshotz score is only a guideline. A more accurate benchmark is comparison against the same vertical in a similar geographic region. These reports can be requested if required.

### 4.0 Design and functionality

1. [Snapshotz Online...](#) is an online customer service self audit / assessment tool which is a checklist divided into 8 sections and 29 subsections containing over 620 variables. (See **Areas covered by the Snapshotz Online audit** [https://www.customerservicesaudit.com/Section/content covered in the AuditList.aspx](https://www.customerservicesaudit.com/Section/content%20covered%20in%20the%20AuditList.aspx))
2. Snapshotz Online is modular i.e. divided into the 29 subsections. Once the subsections are complete the reports generated enable a detailed review of the center and identify specific areas to address. [See sample reports generated](#) Areas for attention is prioritised using appropriate benchmarks as well as providing reports such as the top 50 low scoring variables as well as a report containing details of the audit. Reports have the ability to compare teams against different variables giving management an overarching as well as an in-depth view of each team.
3. The assessment path is modular, easy to follow and is supported with notes to assist understanding requiring no need for any external input unless an independent assessment is required.
4. The ease of navigation and the ability to move through the subsections at a pace the assessor wishes gives further flexibility to the tool. Again any notes or follow up is easily achieved as these can be made within the tool and tasks assigned to individuals with a level of priority as required. A report lists activities, tasks and completion dates assigned enabling follow up easy.
5. Snapshotz Online has [multiple applications](#) - audit, planning, training, comparison of teams and performance, review and reporting. A unique approach and tool not available anywhere in the world.

Technically, Snapshotz Online is a 'Software as a Service' (SaaS) offering and only browser software, e.g. Internet Explorer is required to be installed on the customer's pc with a connection to the internet.

Snapshotz Online customers have no hardware or software to buy, install, maintain, or update. Access to the application is easy: All required is an Internet connection.

Due to cloud based delivery there is completely no requirement for hardware, software or any provisioning or maintenance. System administration is very simple and after the initial registration and assignment to required staff and or teams the only interaction required is to complete the review and download the reports. There is no lead time except when purchasing license and all other content is available on demand enabling increased productivity.





**Table 110 - Areas covered by the Snapshotz Online audit**

[https://www.customerservicesaudit.com/Section/content covered in the AuditList.aspx](https://www.customerservicesaudit.com/Section/content%20covered%20in%20the%20AuditList.aspx)

## Assessment Section Index

### 1.0 Corporate Objectives / Business Processes

- 1.1.0 Corporate Objectives and Strategy Fit (compulsory)
- 1.2.0 Call / Contact Centre Objectives and Strategy (compulsory)
- 1.3.0 Business process alignment and change management (compulsory)
- 1.4.0 Disaster Recovery Plan, Data Security and Compliance (compulsory)

### 2.0 Customer Relationship Management

- 2.1.0 Customer contact (compulsory)
- 2.2.0 Customer Complaint Management (compulsory)
- 2.3.0 Customer satisfaction (compulsory)

### 3.0 Health & Safety and Staff Wellbeing

- 3.1.0 Health & Safety - Health, Safety and Environment (compulsory)
- 3.2.0 Health & Safety - Display Screen Equipment (DSE) and the working environment (compulsory)
- 3.3.0 Health & Safety - Environmental controls and practices in place or what needs to be in place. (compulsory)
- 3.4.0 Health & Safety - Eyes and eyesight, voice, hearing / noise, and musculoskeletal disorders (MSD) are covered in this section. (compulsory)
- 3.5.0 Staff Wellbeing - Covers abusive contacts and work related stress and approaches centres take to reduce stress. (compulsory)
- 3.6.0 Staff Wellbeing - Cover daily work routine and work practices within the centre. (compulsory)

### 4.0 Contact Centre Structure (compulsory)

### 5.0 Recruitment / Career Development / Remuneration

- 5.1.0 Recruitment
- 5.2.0 Career development
- 5.3.0 Remuneration

### 6.0 Training

## Assessment Section Index

### 7.0 Internal Communications

### 8.0 Operational Metrics

- 8.1.0 Scheduling and resource planning
- 8.2.0 Service Measures
- 8.3.0 Reporting – Contact Centre Metrics
- 8.4.0 Contact volumes and costs
- 8.5.0 Call and contact flow monitoring and management. (compulsory)
- 8.6.0 Call and contact quality management (compulsory)
- 8.7.0 Quality of voice messages, automatic response and other customer contact (compulsory)
- 8.8.0 Technology
- 8.9.0 Quality and process analysis
- 8.10.0 Planning and Objective Setting



Table 210 - Steps in a formal audit process and the benefits of the Snapshotz Online Audit tool in supporting the audit process

As an audit tool, Snapshotz Online covers all auditing processes ranging from definition, scheduling, preparation, execution, documenting of audits and tracking of actions.

	Standard audit approach in financial or other functions	Benefits delivered by the Snapshotz Online Tool
Step 1	Definition of what's required to be audited.	Snapshotz Online details the 8 main sections and the 29 subsections that are required to be audited <a href="#">Details of sections required to be audited</a> making the task for management and assessors easy. It's all there for you!
Step 2	Scheduling - when, who is to carry out the audit and what locations geographic or internal departments are to be assessed.	Assessors have complete control over who when where and what. Snapshotz Online will let you assign the license for up to 5 members of the team, whilst giving you control over the completion of the assessment. Snapshotz Online also lets you audit and compare different locations, internal departments and teams within a department. Few other tools have this capability.
Step 3	Preparation - Once it is known what the audit agenda is, preparations need to be made in terms of collection, data, process documentation and lists of what to look for and an interview list.	The structure of Snapshotz Online tool checklists acts as a guideline for preparation. Assessors and auditors will find preparation easy using Snapshotz Online. <u>Very difficult when you don't know what to look for especially for those new to the task.</u> The detail within the subsections as well as the corresponding notes within the Snapshotz Online tool will enable the assessor / auditors to identify what's required and other preparatory work required.
Step 4	Execution - conducting the audit	The structure of the sections, the ability to move easily in and out of the through the sections make execution less tedious and quick. The Snapshotz Online tool allows flexibility yet structure that is required to achieve a consistent process that's valid and can be used time after time.
Step 5	Documenting of audits and tracking of actions	The structure of Snapshotz Online tool checklists means documentation needs are taken care of as you audit. Tracking of actions is made easy as Snapshotz Online enable assessors to make notes and create a task list under every question / variable that is being assessed. The reports generated once the audit is complete enable the



prioritization and follow up of actions.






## 5.0 Company information and contacts

*CustomerServicesAudit the developers of the Snapshotz program, has licensed the Snapshotz product to The Taylor Reach Group, Inc. a Call and Contact Center consultancy.*

*The philosophy that we work to is to provide support to centre management and anyone who has an interest in bettering the customer service environment through Snapshotz Online the self assessment and audit tool and other products and services we develop and deliver.*

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