

Skill Based Routing

Best Practices Guide

Overview

Evolve IP's call center solution includes a call routing methodology that is typically referred to as "skills-based routing". This routing methodology gives call centers granular control over which agents will receive specific call types. The intent of skills-based routing is to properly align the "right" agent to each call by defining each agent's skill levels (or proficiencies) with each call type. For instance, a call center may want to steer simpler calls to their newer agents while reserving more seasoned agents to handle more complex customer inquiries.

Benefits:

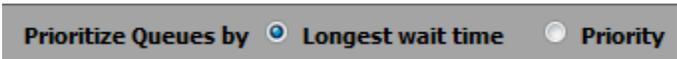
- Align the best agent to every call
- Improve Customer Service
- Fully leverage all your resources
- Improve Service Levels/Reduce Customer Wait Time

Deployment Considerations

Priority Routing decisions – Longest Wait Time vs Priority

Every call center queue must be configured for either "skills-based routing" or "priority routing".

With priority, each organization decides whether calls will be routed based upon one of the following approaches via the OSSmosis Account Level Call Center settings:



Prioritize Queues by Longest wait time Priority

- *Longest wait time.* In this approach, the longest waiting call across all queues to which that agent is "joined" will be delivered.
- *Priority.* Explicit priorities assigned to every queue (e.g. a Sales call is always more important than a Service call) that dictates which queue's call will be delivered to an available agent. In this approach, every call center queue is force ranked and the queue with the highest priority takes precedence over calls in other queues.

With skills-based routing, priority routing discussed above is used to determine which queue's call the agent will be offered when an agent has equal skills in more than 1 call center.

Mixing Priority and Skills-Based Routing

A company may have a mixture of skill-based and priority-based call centers. In this case, the agents who are staffing the priority-based call center(s) are implicitly assigned a skill level of 1 (that is, the highest skill).

It is recommended that a call center be comprised of either all skills-based routing or priority routing. The reason is that with skills-based routing you are able to granularly control which agents receive the calls first.

However, if agents are in both priority and skill-based call centers the agent will always get calls from the priority-based call centers if their skill level in the skill-based call centers are higher than a 1. So it is important to organize your call centers around your agents and which calls they should be receiving.

Queue Level Settings

To activate Skill Based Routing it must first be done at the Routing level on a queue by queue basis.

Call Center Name	Phone Number	Extension	Department	Type	Policy	Active	Action
Marketing		1111		Premium	Uniform	Active	Deactivate Call Fwd Adv Set Password Routing Agents

When changing from Priority to Skill Based Routing, the Hunting Type will default to the three available options. EvolveIP's best practice is to select the Uniform Hunting Type, as this will distribute calls to the agent with the greatest amount of time since their last queued call.

Queue Settings

Routing Type: Skill Based Priority Based

Hunting Type: Uniform ▼

Play ringing tone to agent

Reset call timer on entrance to queue

Agent Level Settings

After each queue has been set to Skill Based Routing, you must assign each agent their appropriate skill level for each queue.

Once you are in the Agents view there are two options:

1. Individually change each agent's skill level from the drop down next to the agents name.

Order in Group	Skill Level	Agents	Action
✘ 1	1 ▼	Aastra 55, Aastra 55 (6102302418)	Manage
✘ 2	1 ▼	Scott, Michael (4845886558)	Manage
✘ 3	2 ▼	Halpert, Jim (4845886559.1002)	Manage

2. Select Manage next to an agent's name and manually change the agent's skill levels for each queue they are assigned that is set up for Skill Based routing.

Call Center Id	Call Center Name	Assigned	Join	Skill
cc-1500000214-BasicCC	Marketing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1 ▼
cc-1500000214-DunderInfinityCC	QCB DEFAULT OPT IN	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	▼
PremiumCC2	Sales Call Center	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2 ▼

3. Save Changes in the Manage Agent window once all skill levels have been assigned.

Call Distribution

Whenever an agent becomes available and there are calls in queue, the following logic is applied based upon the call centers an agent is "joined" to:

1. If there are any Bounced calls, they are offered to the agent
 - a. If only one call center has a bounced call, this call is offered to the agent. This is true even if the agent is more skilled in another call center that has a call queued.
 - b. If more than one call center has a bounced call, the call with the oldest initial offer time is distributed to the agent.
 - c. If more than one bounced call has the same "oldest initial offer time", the skill levels of the agent in the call centers with those bounced calls are compared. The agent is offered the bounced call from the call center where the agent is most skilled.
 - d. If the agent has equally high skills in more than one of these call centers, priority-based routing is used to select
2. The agent is offered a call from the queue where they have the highest skill level
3. If the agent has equal skills in more than 1 call center, Priority Routing discussed above is used to determine which queue's call the agent will be offered
4. If multiple agents are available, the agent with the highest skill level is offered the call
5. If multiple agents are available and they are at the same skill level, the hunting type will determine which agent will be offered the call.