

UpTake Performance Management



The Upstream Works Difference

Knowledge • Automation • Guidance

Performance Management for All Needs

- Contact Center Performance Management
- First Call Resolution
- Contact Center Analytics
- Customer Experience Analytics
- Customer Care Data Mart
- Interaction Profiling

Tools For All Users

- Executive Dashboards
- Interactive “What If” Dashboards
- Multidimensional Analytic Reports
- Ad Hoc Analysis Tools
- Contact Center Operational Tools



Performance Management Guided by Customer Experience

Contact Centers must deal with the day to day reality of customer care. UpTake brings the same level of agent manageability to customer care and resolution as traditional call center metrics bring to call efficiency.

UpTake Performance Management adds KPIs measuring call outcome, effectiveness, and call avoidance to the traditional range of efficiency KPIs, to permit balanced coaching. FCR and Conversion are weighed against traditional AHT and Quality scores to give a 360 degree view of the agent performance.

TeamUp - Coach for Success

The goal of performance management is to have your agents and teams work to the best of their ability. Today, this means managing and coaching agents to resolve every call, efficiently.

But, all calls are not the same. Each call type requires different knowledge, skills and process. TeamUp lets you measure agent performance *by call reason* and by skills, in order to identify training and compliance gaps that lead to repeat calls and long handle times.

TeamUp integrates with virtually any call recording solution, so you select calls for quality monitoring based on a combination of agent performance criteria (FCR, AHT, transfer/conference/etc) and by call reason. Additional KPIs important to your business are easily added to TeamUp.

Gain Performance Insight Determine the customer issues where an agent needs targeted training and coaching. Correlate to PBX skills, to move agents off of queues where they are not resolving calls while they get the help they need.

Select the Right Calls For Quality Monitoring Traditional call selection lets you coach for general behaviors (“saying the right things”) only. With TeamUp, coach by comparing calls where the agent is struggling to successful calls, and add agent call resolution to quality scores.

Balance FCR and AHT Set handle time targets appropriate for each type of call, to ensure that calls are resolved without neglecting efficiency.

Get New Agents Productive Faster – TeamUp shows how successful agents are at resolving calls during those critical first days on the floor. Since TeamUp provides measurements by call type as well as skill, you can take action by adjusting the agent’s skill profile or providing remedial training.

Match Evaluations to Agent Perceptions Your agents know who in the team are doing a good job. UpTake correlates strongly with this agent view, as it tracks how good an agent is at solving calls, who needs help and who is helping, and who is deflecting work. Measurement of all interactions ensures that strong performers are acknowledged, and weak performers are fairly identified.





The UpTake Family

- UpTake Customer Care Mart
- UpTake Interactive Analytic Reports
- UpTake Analyst
- TeamUp Performance Management
- LookUp Interaction Forensics
- UpTake Dashboards
- UpTake Business Consulting

Analyze by Multiple Dimensions

- Actual vs. Target
- Agent
- Assisted service vs. self service
- Call Outcome
- Call Reason
- Custom to your Business
- Customer
- Customer Satisfaction
- Efficiency
- Geographic Regions
- Line of Business
- Location
- Net Promoter Score
- Process Compliance
- Product
- Success (FCR, Conversion)
- Team
- Time
- Time Slice
- Voice of the Customer

LookUp - The Power to Find Out

What happened? When a customer is escalated to you, or more critically, directly to top management, answering what happened – *quickly* – is crucial. And, in cases where there is a customer dispute, having the facts related to call recordings and documentation will let you resolve the issue fairly, while protecting the company against fraud.

LookUp lets you hone in on any interaction, not only by customer ID, time, and agent, but also by over 30 other criteria. Call/screen recordings, emails, and other associated data are available with a single click. And, every other contact the customer made related to this issue are linked. Even customer abandons are captured and linked.

LookUp also adds interactive analytic capability to uncover process and performance issues. Its ITunes™ “smart playlist”-like interface pinpoints interactions based on a wide range of conditions, to answer questions such as:

- How transfer, hold, and handle time affect FCR
- The relationship between survey results, FCR and conversion.
- Why different call reasons have different performance outcomes.

These can be viewed from the agent perspective, to analyze the effects of personal performance, and from the call reason perspective, to analyze how the customer experience is affected by process.

Find Out, Fast Powerful search tools lets you find the interaction and support data, along with all related interactions across all channels for that customer. UpTake captures a complete view of 100% of the interactions, whether assisted or self serve.



Arbitrate Fairly Having all interaction information gives you the complete picture you need to arbitrate a customer dispute fairly. Cases where the customer is attempting to game the system become clear.

Customer Care Business Insight You Can Actually Use LookUp delivers business insight in an incredibly easy to use interface.

Customize To Your Business LookUp is designed to incorporate your performance criteria, so you can discover performance patterns based on product line, conversion rate, sales channel, or any other KPI relevant to your business.



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