



# Nor Cal Contact Center Association Meeting

December 8, 2010



FRANKLIN TEMPLETON  
INVESTMENTS

Franklin • Templeton • Mutual Series

# FTI Agenda

- Company and Transfer Agent Overview
- Customer Service Overview
- Key Performance Indicators
- Tour



# Metrics and Key Performance Indicators



# Key Performance Indicators

## Customer Experience

Metric	Goal
Average Speed of Answer (ASA)	20-45 seconds
Abandon Rate	Tracked for trends
Transaction Turnaround Time	0-5 days
NQR Call Quality	Meet/Exceed Industry Average
NQR Transaction Quality	Meet/Exceed Industry Average
NQR Correspondence Quality	Meet/Exceed Industry Average



# Key Performance Indicators

## Agent Performance

Metric	Goal
Average Handle Time for Calls	Approx. 6:00 min
Call Wrap Up %	22%-23%
Schedule Adherence	96%
Productivity Utilization	95%



# Key Performance Indicators

## Budget

Metric	Goal
Cost per Call	Varies each year
Cost per Transaction	Varies each year



