



Cut your **costs** not your **CX**

Our Contact centre cost optimisation checklist

As customer expectations continue to evolve, CX leaders are under increasing pressure to deliver exceptional service while managing rising operational costs. For contact centres, this balancing act can be particularly challenging, with limited capacity to identify inefficiencies or implement cost-saving strategies.

That's why we've created this practical checklist, designed specifically for CX Directors who want to streamline operations without compromising service quality. From performance reviews to automation audits, each section offers clear, actionable prompts to help you uncover hidden savings, drive efficiency, and build a more scalable, customer-centric operation.

1. Performance & process review

	YES	NO
Have you reviewed agent performance in the last 6 months?	<input type="checkbox"/>	<input type="checkbox"/>
Is there a documented process for handling common customer issues?	<input type="checkbox"/>	<input type="checkbox"/>
Are call escalations tracked and analysed for root cause patterns?	<input type="checkbox"/>	<input type="checkbox"/>
Have you conducted a recent gap analysis across roles and workflows?	<input type="checkbox"/>	<input type="checkbox"/>

2. Call deflection strategies

	YES	NO
Do you have an effective IVR system that routes calls accurately?	<input type="checkbox"/>	<input type="checkbox"/>
Are you using ACD (Automatic Call Distribution) for load balancing?	<input type="checkbox"/>	<input type="checkbox"/>
Have you deployed a chatbot or live chat to handle basic queries?	<input type="checkbox"/>	<input type="checkbox"/>
Are your digital channels (email, social, webchat) actively managed?	<input type="checkbox"/>	<input type="checkbox"/>

3. Self-service enablement

	YES	NO
Is your knowledge base up to date and easily accessible?	<input type="checkbox"/>	<input type="checkbox"/>
Do you offer a virtual assistant or FAQ-style automation?	<input type="checkbox"/>	<input type="checkbox"/>
Can customers onboard themselves or resolve issues themselves?	<input type="checkbox"/>	<input type="checkbox"/>
Have you tracked self-service success rates and drop-off points?	<input type="checkbox"/>	<input type="checkbox"/>

4. Workforce Optimisation

	YES	NO
Are you using a workforce management (WFM) tool to forecast demand?	<input type="checkbox"/>	<input type="checkbox"/>
Is agent scheduling flexible and aligned with peak times?	<input type="checkbox"/>	<input type="checkbox"/>
Have you integrated AI for predictive staffing or shrinkage planning?	<input type="checkbox"/>	<input type="checkbox"/>
Are you tracking schedule adherence and productivity in real time?	<input type="checkbox"/>	<input type="checkbox"/>

5. Tech & automation audit

	YES	NO
Have you identified manual tasks that could be automated?	<input type="checkbox"/>	<input type="checkbox"/>
Are you leveraging AI to monitor performance or suggest improvements?	<input type="checkbox"/>	<input type="checkbox"/>
Is your reporting automated and available in real time?	<input type="checkbox"/>	<input type="checkbox"/>
Have you reviewed your tech stack to remove unused or duplicate tools?	<input type="checkbox"/>	<input type="checkbox"/>

6. Cost visibility & governance

	YES	NO
Do you have a clear breakdown of monthly contact centre costs?	<input type="checkbox"/>	<input type="checkbox"/>
Are there cost-saving targets aligned with CX goals?	<input type="checkbox"/>	<input type="checkbox"/>
Is someone responsible for monitoring and reporting cost metrics?	<input type="checkbox"/>	<input type="checkbox"/>
Do you benchmark costs and efficiency against industry standards?	<input type="checkbox"/>	<input type="checkbox"/>

Quick wins

	YES	NO
Introduce chatbots for out-of-hours support	<input type="checkbox"/>	<input type="checkbox"/>
Reduce average handle time via scripting or AI assist	<input type="checkbox"/>	<input type="checkbox"/>
Encourage digital channel usage over voice for simple queries	<input type="checkbox"/>	<input type="checkbox"/>
Train agents on first-contact resolution best practices	<input type="checkbox"/>	<input type="checkbox"/>



Our contact centre consultants would like the opportunity to share what we have delivered for our other clients. Please get in touch to speak directly with them.

Call us 080 0047 3970

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