

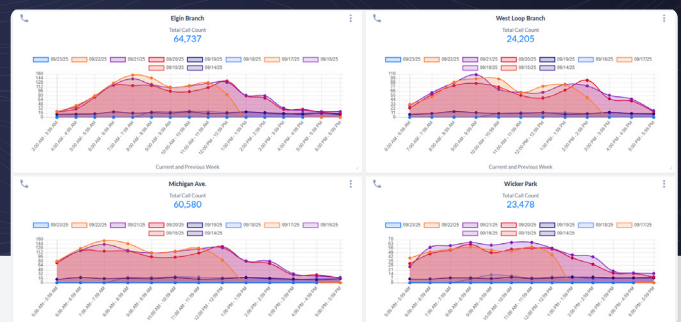


UC Budgeting Cheat Sheet for Financial Institutions

Control Calling and Contact Center Costs With Actual Utilization Data

Unreliable capacity planning can mean wasted spend or blocked calls during peak demand. Variphy equips IT teams with real usage data to balance performance and cost. Here are three steps to build a UC budget you can trust.

Step 1: Analyze Peak Utilization Trends



Why It Matters

Track concurrent call activity down to the second, giving you a clear view of when and where capacity is truly needed.



How to Do It

- In CUCM Call Analytics, create a **Capacity Utilization Report**.
- Use **Originating or Terminating Device Name** in your Search Set to include both inbound and outbound calls.
- Enable Concurrent Call Activity Summary, Charts, and Tables for detailed visibility.



What to Look For

- Devices that regularly hit **80% or higher** concurrent call capacity.
- Peak durations that last several minutes or more — even short spikes could disrupt service.



Actionable Insights

- Allocate trunk CapEx based on actual demand patterns, not assumptions.
- Reduce costs by consolidating or eliminating underutilized routes.

Step 2: Tier Your Locations by Utilization

Search Criteria Summary					
Search Set	Contact Count	Average Contact Queue Time	Handled Contact Count	Handled Contact %	Abandoned Contact Count
Total Call Queue Summary	45	00:00:04	21	46.67%	19
CSQ Name and Agent Name Summary					
CSQ Name and Agent Name			Agent Presented Count	Agent Handled Count	
Loans			10	10	
ALBRECHT, ANNIE (ANNIE ALBRECHT)			1	1	
YOUNG, JEFF (JEFF YOUNG)			9	9	
Disputes			11	11	
VRBA, VICTOR (VICTOR VRBA)			11	11	
Outbound CQ			0	0	
TOTALS			21	21	



Why It Matters

Tiering sites by trunk usage lets finance teams focus CapEX where it's needed and cut costs where capacity is wasted.



How to Do It

After running the Capacity Utilization Report, identify locations by peak utilization:

- **Tier 1: >80%** — plan capacity upgrades.
- **Tier 2: 50-80%** — monitor for growth.
- **Tier 3: <50%** — consider consolidation.



What to Look For

- High-utilization sites with call congestion.
- Underused branches where trunk capacity can be scaled back.



Actionable Insights

- Redirect CapEx to Tier 1 locations.
- Optimize OpEx by right-sizing Tier 3 sites.

Bonus Webinar: "Executive Dashboards for Microsoft Teams Phone": <https://www.variphy.com/webinars>

Step 3: Automate UC Forecasts

Schedule Settings

Search Time Window

Delivery

Schedule Enabled

Schedule Name
Quarterly Trending Analysis

Report
TEMPLATE - Call Queue Summary

Execution Schedule
Schedule Frequency
By Month

Months
JAN FEB MAR APR MAY JUN



Why It Matters

Automating UC usage reports ensures consistency and reveals patterns across departments or locations.



How to Do It

Using Variphy's contact center analytics solution, schedule **monthly usage reports**:

- Track agent states, calls, and time trends.
- View CSQs, call volume, service level, and queue times.



What to Look For

- Seasonal demand shifts across departments or branches.
- Long wait times or high abandonment that could impact service SLAs.



Actionable Insights

- Build accurate OpEx forecasts with consistent month-over-month data.
- Prepare audit-ready summaries with zero manual work.