

What has Your Quality Monitoring Program Done for You Lately?

Best Practices in Quality Monitoring

Most contact centers today have a well embedded quality management process in place, but many of these quality programs are falling short and failing to deliver real business value.

While many companies can check the box to say they have a quality program, too often it is a process that records and scores five calls per agent per month. Such a program may see performance spikes at implementation but it will quickly flat line over time and before very long the objective becomes to service a process that is adding little to no value.

There are many reasons why quality programs fail to deliver benefits but most contact centers could vastly improve not only their quality programs, but the customer and the agent experience as well by adopting a few easy-to-implement tactics and processes.

This paper offers some practical best practice tips for assessing and increasing the value that your quality process is delivering.

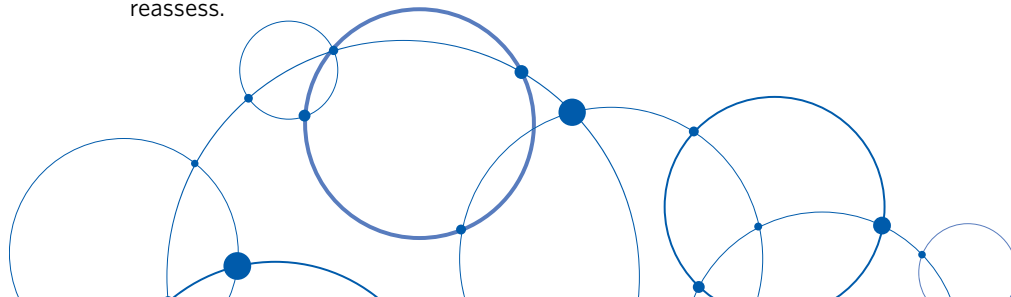
Understand the Purpose of your Quality Monitoring Program

Many contact centers have never changed their quality process since it was first implemented, perhaps many years ago. At the time it was implemented it likely had an important strategic focus and its objective and purpose was clearly defined. But is the process you implemented years ago, still aligned with the current corporate objectives?

An effective quality monitoring program should be an iterative multi-step process designed to:

- Measure agent adherence to internal policies and procedures.
- Improve consistency and quality of customer interactions across all channels, not just the telephone channel.
- Assess business execution - detect and fix broken or inefficient processes or operational issues throughout the company.
- Improve agent performance.
- Identify agent training needs.
- Pinpoint policies or processes that frustrate and alienate customers.
- Maximize every customer interaction.
- Identify business trends.
- Improve the customer experience.

If your current quality program is not delivering value in all of these areas today, then it's time to step back and reassess.



Understand the Results of your Quality Monitoring Program

Once you have agreed on the objectives and desired value outcomes from your quality monitoring program, you need to be able to measure and articulate the results of the process you have in place against all the areas described above.

Publishing a weekly quality score on a performance dashboard seems to be a common method of assessing and articulating the results of the quality program, but quality scores do flat line over time and this methodology does not show the true value the process is delivering.

Many call center professionals admit that their quality assurance personnel don't always receive the time and resources they need to lead an effective quality program. This often stems from the fact that they aren't sharing enough of the key data uncovered during monitoring with the enterprise as a whole, and are not expressing the value of the quality monitoring process in real terms.

Results of the quality process should be measured in real terms and shared across the enterprise including:

- Improvements in advisor productivity.
- Enhancements in customer loyalty, satisfaction and customer experience.
- Improvements in inefficient and broken operating procedures.
- Increased sales and service performance.
- Reduced operating costs.
- Improved employee satisfaction.
- Reduced attrition.

Ensure your quality monitoring program has a process for capturing, measuring and reporting the results in each of these areas on an ongoing basis.

Consider Who is Responsible for Monitoring Calls and Why

Once you've decided why you are listening to calls, you need to think about who is the appropriate person or group to evaluate the calls. If the quality program is going to be effective in all the desired value areas, then different groups should be responsible for evaluating.

Quality and customer experience is often measured from an internal perspective. Can a team leader really judge whether a particular call delivered a great customer experience? Does your quality process and technology enable you to have customers evaluate calls?

Often, evaluating calls is the sole responsibility of the team leader. The team leader should be responsible for agent performance and development, but consider having a separate quality assurance (QA) team that is responsible for monitoring strategic initiatives on an enterprise wide basis. QA teams should also monitor the final transaction disposition in the back office, back office trends and root cause analysis to get to the bottom of problems and process improvements.

The training and education team should also be part of the call evaluation process to measure the impact of the training courses they are developing and delivering and to identify opportunities for improvements in their area.

Bring advisors into the process and have them evaluate their own calls, as well as their peers. Engaging advisors in the process will foster motivation and empowerment in addition to enhancing their perception of the credibility of the program.

Determine the Optimum Frequency and Number of Evaluations

In order to have confidence in the results of the program, you will need to ensure that the results are based on a statistically significant analysis of service delivery and quality. What do the number and type of calls you are evaluating per month represent as a percentage of the total call volume and does that percentage represent a statistically relevant sample?

Most contact centers do not have resources to conduct a statistically valid sample because listening to calls and evaluating them is a labour intensive and time consuming process and therefore the most common criteria is to evaluate three to five calls per agent per month. Unfortunately this criteria yields the least value to the business.

Consider moving away from the one size fits all low value approach to a more strategic approach to the challenge, such as performance-based monitoring. Heavily monitor your best performers to understand what it is that they are doing that makes them the top performers and identify ways to start driving this best practice through the organization.

Advisor-led monitoring enables advisors to flag calls where they feel they need more training, when they did a great job or to bring a potential customer or process issue to management's attention. This also engages them in the process and can impact employee satisfaction and attrition.

In addition, you may want to consider automating call evaluation through speech analytics technology. Speech analytics allows you to automatically listen to 100 percent of your call recordings and automatically analyze them for content and context to reveal why customers are calling you, what the real customer experience is, how you are handling the calls and how efficient your operational procedures and policies are. Plus, speech analytics can deliver automated call scoring whereby every recorded interaction is systematically scored. This enables contact centers to focus their limited quality resources on high impact calls. Additionally, speech analytics can automatically categorize every recorded call so that quality efforts can incorporate all types of calls received and also designate calls for review by different departments, such as training or a cross functional business team, if a process improvement opportunity is identified.

Review Your Scorecards on a Regular Basis

Many contact centers spend a lot of time developing scorecards when the quality monitoring program is first implemented, but while the business focus and the contact center objectives may change over the years, the scorecards tend to remain untouched and therefore are often no longer aligned to the corporate objectives. Scorecards should be reviewed and assessed as to their appropriateness at least every 9 - 12 months.

As more and more companies are embracing customer-focused quality, the scorecard should become less about metrics and more about improving the value from the customer's perspective. Moving the external quality metrics and numbers to a customer-driven and focused approach frees the contact center from managing to a number and servicing a process. A numerical, results-oriented scorecard with potential agent disciplinary actions based on low scores creates a distraction for everyone and has little impact on the customer. Quality programs that focus on behaviors and use scorecards as a mechanism for identifying opportunities for developing critical skills and knowledge provide agents with the tools and feedback needed to truly improve the customer interaction. In turn this allows your team leaders to become coaches rather than scorekeepers.

Many organizations evaluate and score calls in isolation from other performance data. Scorecards that do not provide a holistic view of performance and trends over time, result in a focus being on the score rather than the performance opportunity. Consider incorporating the quality scoring into a performance management solution to provide a holistic view of performance. A performance management solution will enable you to recreate scorecards and also embed additional performance data, graphs and trends to ensure that the process remains performance focused, rather than score focused.

When developing scorecards, contact centers have a tendency to favor a one size fits all approach. This approach certainly makes it easier to compare and analyze scores over time and across each call category and the whole agent population. However, developing an approach based on ease of measurement rather than focusing on the value results in a process that is focused on metrics and scores rather than performance and value. Best practice contact centers create a variety of evaluation forms that are tied to agent skill levels and development requirements.

It's important that you do not just review the questions and sections on the scorecard, but ensure that you also review the scoring ranges on a regular basis too. The ranges should be high enough so that an excellent transaction is clearly identifiable, but not so high that few agents can attain an excellent rating. Plus, be sure to tighten the ranges over time to ensure that the scores do not flat line. When a quality monitoring program is first implemented for example, excellence might be represented by any score over 85 percent. Most customers are unlikely to think that 85 percent is excellent and so over time the range needs to be narrowed to 90 percent and above.

Ensure Your Coaching Process is Effective and is Taking Place

Lack of coaching is the primary reason why most quality monitoring programs fail. Most organizations have a process whereby quality coaching sessions should be conducted on the back of calls being evaluated and scored, to provide feedback and mentoring to improve performance. However, too often these sessions don't take place as often as they ought to because of team leader time constraints. Listening to calls without providing the feedback not only does not provide any value, but the quality process then becomes a waste process.

Coaching is the most important part of the QA process and is the delivery mechanism for improving performance and providing value. Advisors and team leaders should both be as prepared as possible for such sessions. Advisors should have had the opportunity to listen to the call and consider what was good and what could be improved so that coaching sessions are as effective as possible.

All too often, coaching sessions take place with no output / actions. Feedback alone may be enough for some advisors to up their game, but for most people some additional actions, such as setting incremental goals, attending additional training, etc is required if performance improvements and value is to be derived from the process.

Most companies have no visibility into this part of the QA process and they assume that because the procedure says five coaching sessions per week, then these sessions will be conducted and that they will be conducted well.

Consider how you can track the number of coaching sessions that need to take place, time to action, time spent in coaching and the effectiveness of that coaching session. You may be surprised at the results and certainly would then be able to identify opportunities to improve this process and deliver more value out of the quality process. Integrating a performance management solution into your quality process would allow you to track these coaching sessions in terms of timeliness and value and then report on how effectively this part of the process is being managed. This will help the transition from coaching to numbers to coaching to behaviors. Furthermore, incorporating the quality process into the performance management solution would enable you to capture, understand and then incorporate best practice into all coaching sessions.

Ensure You Have a Closed Loop Training Process

Developing a closed loop training process is an important part of any quality monitoring program. Use knowledge gleaned from the quality process to identify trends and training opportunities and also to measure the effectiveness of your training department. Include a process for funneling recommendations to the training department, or ideally have them be part of the evaluation process itself, and ensure all training, reference materials, policies and procedures are accurate and up-to-date. The training department and quality team should hold monthly meetings to assess the effectiveness of training and identify new opportunities.

An integrated eLearning solution can ensure advisors receive consistent and timely training based on opportunities identified in the quality process. Great calls can be transformed into best practice training clips and sent via eLearning for the whole team / contact center to listen to. This can prove a great way to show people what a good call sounds like and a great motivational tool for those advisors whose calls are turned into training sessions.

A well constructed quality program that conducts call and screen recordings and identifies opportunities for process and procedure improvement can identify opportunities to improve policy, procedure, systems, etc., and deliver updates to advisors in a timely manner without impacting service levels to ensure they have the most up-to-date knowledge and skills to deliver great quality.

An eLearning solution that is integrated to the automatic call distributor (ACD) and the workforce management system will ensure that advisors can receive more personalized reinforcement training, as well as regular communication updates regarding improvements to process and procedures and new system and policy requirements without increasing costs and impacting service levels.

Results of training and communication content delivered to advisors through this method can be reported upon to ensure agents have experienced the training and understood it. A closed loop process can then be implemented to drive business rules on your recording platform around who, when and how often to record advisors based on results of their training sessions and overall performance.

Don't Forget Reward and Recognition

Some contact centers use the quality monitoring process simply to identify opportunities for performance improvement. It can also be a powerful tool for motivating advisors and as such, a rewards and recognition element of the process is a must. Recognition can be as simple as sharing a great call amongst peers or inviting top performers to take part in department activities, such as coaching new hires, becoming a subject matter expert or delivering an up-skilling session.

However, recognition must be done in a way that ensures it is not always the top performers being recognized – remember the most improved advisors and the ones that add value by flagging calls that identify broken processes. This helps to drive empowerment and adoption by everyone.

It is never too late to evaluate your quality process and it's important to recognise whether your organization is servicing a process or adding value. Your quality process needs to be assessed regularly to ensure it is delivering results – if it's not adding value then make changes now. Implementing best practice and evaluating the entire customer experience will deliver business benefits that go well beyond agent productivity and will ensure that you make significant steps in advancing the perception of the contact center's value within the organization.

Corporate Headquarters

300 Apollo Drive
Chelmsford, MA 01824

978 250 7900 office
978 244 7410 fax

Europe & Africa Headquarters

2 The Square, Stockley Park
Uxbridge
Middlesex UB11 1AD

+(44) 20 8589 1000 office
+(44) 20 8589 1001 fax

Asia Pacific & Middle East Headquarters

138 Robinson Road
#13-00 The Corporate Office
Singapore 068906

+(65) 6590 0388 office
+(65) 6324 1003 fax

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