

Quality Management with Actionable Results

Gaining visibility, discipline and control at every customer touch point

Contact centers are changing rapidly, and traditional quality management is going to have to change quickly as well to keep pace. It should be no surprise to anyone in the industry that the customer experience is becoming the most important contact center objective.

To make matters even more challenging, the traditional voice channel is now joined by email, chat/IM, social and SMS as popular channels for customer service, with most Millennials preferring the non-voice channels. The quality management process will increasingly be the focus of contact centers worldwide. This whitepaper examines the fundamentals of quality management and how you can improve the process in your contact center.

What is Quality Management?

Quality management is a continuous process of agent interaction monitoring and analysis that allows you to continuously improve the quality of interactions with your customers. You can distill it down to the following five major functions:



You need to capture the interactions between the agent and customer, whether voice or text, by recording those interactions in easily indexed and retrievable form. Selected interactions are reviewed by trained quality experts who evaluate the quality

of interactions based on an objective scoring process. Since people are required for scoring, there is inherently human subjectivity in the results. We try to normalize each evaluator's scores through a calibration process, driving consistency throughout the organization for scoring and coaching. Analytics tools will help quickly identify poor performers, best practices, recurring problems and key customer experience details. Incorporating the voice of the customer through customer surveys and analytics will arm businesses with valuable information about individual and team quality performance, which will initiate coaching of agents to improve quality, and then return to recording new interactions to ensure that the quality has in fact improved.

With a good quality management process in place, you should be able to reduce callbacks, identify process improvement opportunities, facilitate actionable employee development, focus employee training efforts, and improve the overall performance of your contact center. No wonder most contact centers consider quality management to be the most fundamental and important of all workforce optimization components.

Unfortunately, there are often organizational barriers standing in the way of implementing a successful quality management process. Even experienced quality analysts have difficulty designing truly

objective quality evaluation criteria, and the process is manual at its heart, so there are sometimes inconsistent results. That creates an opening for doubters to challenge its credibility, so the contact center organization does not always fully “buy in” to the process. Also, without more extensive investigation, it's often difficult to know whether an apparent quality problem is an individual agent issue, a team issue, a scoring issue, an evaluator issue, or no issue, and that creates additional organizational skepticism. When senior management does not fully support the process, resources are underfunded especially training for coaches/supervisors.

Best Practices for Quality Management

Quality management has been used for years in contact centers all over the world, but most organizations have not paused to develop a set of best practices for the overall process. Below are five simple best practices that have proven to be effective for contact centers of all sizes:

1. Identify the Proper Sampling Size

The chart below from the Acent Group shows the number of agent calls per month being monitored across a wide cross-section of contact centers. The number of calls that should be monitored will vary by industry and by type of call, for example, financial services typically requires more monitoring because of the many regulations in this vertical market. On average, about 6.3 calls per agent per month are monitored for quality. Contact centers monitoring less than one call per agent per month are definitely on the border-line of insufficient monitoring, but you will have to look at the statistics of your own call center to determine what is sufficient.

2. Establish a Well-defined Monitoring Process

As with most things in quality management, the process can vary widely by contact center, but the important thing is that you clearly document the monitoring process, since this will force critical thinking as well as consistency within and across contact centers. For example, you may decide to use dedicated analysts, or supervisors or coaches for evaluation, and if you have multiple contact centers,

you may want to centralize the function to do all monitoring, calibration and compliance recording. At a minimum, you should document answers to the following questions:

- What quality management tools do we need?
- How will we sample?
- How will we access interactions?
- How will we balance evaluations across channels?
- How will we assign evaluators to interactions?
- How will we score interactions?

Not surprisingly, powerful but easy-to-use quality management software such as Alvaria™ Quality Advanced is an essential part of the process.

3. Design a Concise, but Thorough Evaluation Form

The form used by evaluators is critically important to ensuring a successful quality management process. Each evaluation form should include shared evaluation questions that are used in all of your evaluation forms as well as questions that are tailored to specific call types. Shared evaluation questions might include core KPIs and behaviors, compliance procedures and behaviors, active listening skills and soft skills. These shared questions help with the analysis of overall quality management and progress being made. Tailored questions might include more granular measures for specific channels, product or vertical market customizations as well as specific behaviors expected in certain communication channels. Advanced quality management tools such as Alvaria Quality make it easy to create forms on the fly. One note here: be sure to measure behaviors rather than attitudes. Attitudes are dispositions, feelings or positions toward a person or thing and are typically hard to quantify. Behaviors are observable responses to external or internal stimuli and are less subjective.

4. Create a Scoring Guide

In order to ensure that everyone on your evaluation team is aligned, and to create an atmosphere of fairness for the quality management process, you really need to create a written Scoring Guide. Typically, you would assemble a cross-functional

team to create the Guide that documents clearly what makes “good” good and what makes “bad” bad. It would include specific descriptors, causes and behaviors as well as many examples, so that any reader can understand what your contact center is trying to achieve. You should also dedicate training time for agents and management to fully understand the Scoring Guide. After training, agents should know what is expected of them and how to perform. Dedicated training on the Guide contents will also give the quality team and management clear references for agent evaluation.

“Quality is not an act. It’s a habit.”

- Aristotle

5. Implement a System for Coaching

Coaching is not an optional function, even though it often is one of the first areas to get sacrificed when interaction volumes spike. Effective coaching is the culmination of all the work done throughout the quality management process, so it should not be perceived as a secondary priority. You can’t hold agents to metrics and goals when there is no mechanism to help reach them. Generally, coaching to achieve quality goals works best when you use the SMART System:

- **S**pecific – Agents need to understand exactly what is expected of them
- **M**easurable – It should be clear when progress is being made toward a quality goal
- **A**ttainable – Goals should be realistic in order for agents to take them seriously
- **R**elevant – Coaching should relate to their day-to-day activities and what is important to the business
- **T**ime-bound – Achievement of a goal via coaching needs to have a clear deadline

Advanced Best Practices for Quality Management

The best practices above are basic “blocking and tackling” activities that ensure your quality management process is achieving its primary purpose. When you have mastered these, consider implementing the following to really get your quality process operating like a well-oiled machine:

1. Calibrate Your Evaluators

Calibration is an effective way to keep your quality management team, operations team and coaching team fully aligned, and a well-considered calibration process can help take some of the subjectivity out of the inherently subjective nature of evaluations. Calibration sessions should be held a minimum of once every two weeks, but once per week will give you much better results. Include all of your evaluators, supervisors, coaches and even customers where possible in the session and rotate in a sub-set of agents to better engage agents and get buy-in. Have the participants individually score selected calls and submit these scores in advance. Then as a group, listen to the calls and discuss the divergence of scores in this open forum. Use the Scoring Guide as the ultimate arbiter of disputes, and if the Scoring Guide is found lacking, update it accordingly. This process should make clear to all how the calls should be scored and feedback delivered.

2. Audit Your QM Process

This is a great way to hold the quality team accountable and build credibility for your quality process, because the quality team is being held to high standards just like the agents. Objectives for the quality process should be established typically including accuracy, productivity, and consistency. These objectives should become part of the balanced scorecard of the quality team and directly affect their incentives or bonuses. Accuracy can be measured by comparing customer measured quality scores with internal scores, or by using an appeal percentage to identify how often agents are disagreeing with scoring and the agent made a mistake. Productivity can be measured with a metric such as how many calls the team can evaluate per

hour. Consistency can be measured by examining the variance percentage in the quality scores that are seen during calibration. If the process is working, this variance should decrease over time.

3. Ensure Your Agents are Engaged

A recent poll by Gallup shows that 13% of workers worldwide are not engaged in their jobs and 29% of American workers are not engaged. It's a sad commentary, but the facts speak for themselves. How can you improve this situation in your business? Gamification, or some variant of it, can dramatically affect attitudes of workers in general and contact center agents specifically. Creating healthy competition brings out strong performance in all of us, and conspicuously displaying quality scores will make a marked difference in the attitudes of your agents. Using team quality scores is especially effective in building a sense of teamwork toward a common goal, since it is the collective score that is being judged against other teams. If you can create an environment of healthy competition, you will see increased employee focus, higher productivity, and reduced attrition.

Actively disengaged employees continue to outnumber engaged employees by nearly 2-to-1.

4. Use Analytics to Hear the Voice of the Customer

We talked about monitoring at least one call per agent per week above as a minimum standard, but random monitoring and surveys typically account for less than 1% of all calls. You will undoubtedly miss most of the good quality calls and most of the poor quality calls for any given agent. That's where analytics becomes important. Speech and text analytics programs such as Alvaria™ Speech Analytics and Alvaria™ Desktop Analytics give you the capability to search through 100% of your customer interactions and uncover agent best practices as well as issues with individual agents or teams and operational issues that may span the entire contact center.

With the power of Big Data and analytics at your fingertips you can search for positive outcomes such as high customer satisfaction, high quality, high efficiency or completion of sale, and from these interactions determine what agent technique was used to make the interaction a success. Likewise, you can search for negative outcomes such as low customer satisfaction, disconnects, high average hold time (AHT), holds or transfers, silence or dead air, repeat calls or anger to determine what agent actions created noticeable problems. Further, analytics can categorize the most important calls for evaluation providing quantifiable data to drive your quality focus.



The voice of the customer should be the loudest voice when it comes to measuring quality, because customers have the purchasing power that makes your enterprise successful. Actually, customers are giving you feedback during every interaction, but how do you extract that feedback from a torrent of unstructured data? Customer survey software such as Alvaria™ Surveys is often used to understand what the customer is really thinking. The other primary source of feedback is analytics of your wealth of voice and screen recordings. Speech and text analytics, although not perfect, are very effective tools for collecting unfiltered customer feedback, i.e., feedback without structured survey questions.

5. Look for Process Improvements

We started out by saying that quality management is a process of continuous improvement, and if you properly implement quality management, your contact center should be continuously getting closer to quality goals. Along the way, there are many opportunities for improving processes that are outside of the quality management process itself. For example, your quality management efforts should allow you to understand what agent skills are necessary for agents to be successful, and this should inform your recruitment process so you hire people with the right skills and attributes. It should also significantly affect the type of new-hire training

you do and the type of continuing education you recommend for agents. Quality management will also uncover existing bottlenecks in call flow on agent screens and need for additional support on-floor. You will also find which supervisor tools are needed to make coaching as effective as possible.

Putting It All Together

Contact centers are changing quickly, with the quality of the customer experience increasingly becoming the primary focus of many contact centers. The quality management process will need to become more effective than it has ever been before to reach these higher standards for the customer experience, despite the proliferation and challenges of new customer interaction channels. This whitepaper suggests some actionable best practices in quality management that will allow you to achieve world-class quality even in the changing contact center environment.

About Alvaria™

Alvaria helps organizations efficiently manage and engage the modern workforce and connect compliantly with customers and prospects. Our open, innovative multi-platform is purpose built for two core competencies; a feature-rich, intuitive, and intelligent workforce engagement management platform, and a multichannel proactive compliant outreach platform. Alvaria, the product of the merger of world leaders - Aspect Software and Noble Systems - is proudly celebrating 50 years in business reshaping customer and employee experience. ALVARIA. Reshaping Customer Experience™.