The essential guide to
Call Centre Quality Monitoring

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Preface

What is The Essential Guide to Quality Monitoring?

This guide is for any contact centre professional who wants to transform how they manage agent behaviour and overall business performance.

Quality Assurance (QA) offers invaluable insights into how effectively your contact centre handles interactions with customers, but only if you approach it correctly.

We will start by running through what quality means to the modern contact centre, discuss how it is typically being used to manage processes and the customer experience, and then explore some of the specific ways you can make the most out of quality.

> At Puzzel, we believe that for contact centres to deliver a truly outstanding customer service, quality monitoring needs to become much more than a simple box-ticking exercise.

Quality monitoring has the potential to completely transform agent performance, unlock actionable insight, and supercharge the level of service delivered to every one of your customers - but it requires the right perspective and a considered approach.

By reading this guide, you will be equipped with everything you need to truly understand quality monitoring, and maximise its potential to empower your staff, improve business efficiency, and deliver a consistently great customer experience.

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Introduction

Why is Quality Assurance Mission Critical?

The contact centre should be the home to great customer service, and the agents at the frontline of this effort are tasked with the responsibility of managing an array of customer issues day-in, day-out.

Contact centre management and leaders have to ensure their workforce is engaged and empowered to provide the best possible level of service to customers.

This means equipping the business with the right tools to monitor and evaluate the quality of customer interactions across every channel.

QA is a way to observe contact centre interactions and measure the standard of service agents deliver. If you commit to doing it well, and take advantage of smart, datadriven insights from up-to-date monitoring tools, QA creates an accurate picture of the customer experience your contact centre currently provides.

From here, you can evaluate agent performance and take action to improve it, so that agents are able to have better conversations and make less mistakes. The overall performance of your contact centre increases as a result.

The quality of customer interactions is assessed according to how closely they meet a certain set of criteria defined by the contact centre, which usually involve:

✓ Ability to adhere to processes and other guidelines

✓ Ability to control the interaction with the customer

✓ Ability to share relevant information and fulfill customer needs or resolve an enquiry

✓ Ability to build a relationship with the customer

> The real value from QA comes from being able to use the data collected during the criteria scoring process to create impactful feedback that drives improvements across the entire business.

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The issue? Quality Assurance is broken

Most contact centres have some kind of quality assurance in place, but the methodologies surrounding them often limit how useful they are.

Typical QA processes are fraught with selection bias. The wrong calls are selected, evaluation forms measure the wrong things, duplicate effort limits coverage and reporting offers little in the way of actionable insight. As a result, all efforts are ignored by frontline teams, who feel like QA is an unwanted, ineffective intrusion on their time imposed from above. In some extremes, senior managers start to question the value of QA too.

The bad news is that there are several significant challenges we face when creating a quality process that delivers value. The good news is, with the right guidance and support, you can change this.

Contact centre leaders have the opportunity to rejuvenate their business by creating a quality model that drives measurable, significant improvement. Over the years, we've been part of teams that have used QA to drive a 6% increase in CSAT scores and a 10% reduction in AHT by following many of the tips we've outlined below.

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Developing an effective QA scorecard

The QA scorecard is one of the most important elements to the QA process. It therefore needs to be designed and calibrated in the right way to ensure that evaluators are evaluating agents on what's important to the customer, to the business and to the industry regulator.

The scorecard allows evaluators to define whether or not agent and customer interactions are meeting the contact centre's standards for compliance, efficiency and customer satisfaction.

The challenge QA leaders face is producing a form that allows evaluators to judge customer interactions accurately and consistently, whilst balancing the needs of the business with the needs of the customer. The idea is to generate as much valuable data as possible to reveal deep insights about the business as a whole, as well as assessing individual agent performance.

This can seem tricky to achieve - it's not easy to apply quantitative metrics to human interactions with their own uniqueness and nuances.

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What should a good QA scorecard look like?

The first step in defining what to include on a QA scorecard is figuring out exactly what you want to measure - this is often a mix of compliance, process and customerfocused questions.

For example, an agent might be able to resolve a customer's issue quickly and effectively, but if they fail to adhere to certain script requirements outlined by the scorecard, (for example, not saying 'good morning'), this can often constitute a 'fail' for that interaction.

Traditional quality forms tend to be weighted, which means failing to meet criteria for particular outcomes can produce a lower quality score. The reduction in score is dependent on the severity or importance of the outcome decided by management.

This results in circumstances where agents are 'failing' quality evaluations because of not meeting criteria that have no real effect on customer experience. In many cases the label of failure is enough to create unhappy agents who are under the impression that a near-perfect performance still isn't good enough.

> The trick here is getting the balance right between the three. Contact centres often place too much of an emphasis on scorecard criteria that are closely tied to internal processes deemed important by the business, rather than criteria that make a tangible difference to customer experience.

In the eyes of the agent and the customer, however, there might have been little about that interaction that seemed like a failure.

Most evaluation forms are developed using a top-down approach that is centred around customer service from the perspective of the business, rather than from the perspective of the customer. It's essential to make sure the form is put together with the customer at heart, rather than what the business assumes the customer wants.

It's important to think about which elements of an interaction are the most critical, and ensure their value is reflected in your QA scorecard criteria.

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A Matter of Time

Many quality teams and team leaders spend a considerable amount of time conducting audits and observing customer interactions. It's important to think about the process an evaluator will go through when filling out a QA scorecard.

Map out which criteria will relate to which part of a customer interaction, and structure the form accordingly. This often doubles the efficiency of quality teams if done correctly.

A common problem is expectations for evaluators and team leaders to meet a monthly target of evaluations per month. Whilst it's understandable to develop a consistent level of work, monthly targets don't necessarily achieve this. In these cases, a number of evaluations can be crammed in as the month comes to a close in order to meet targets.

The problem with cramming is that the results the evaluations produce do not paint an accurate or insightful picture into levels of quality throughout the month. As a result, evaluators, and especially team leaders run the risk of ignoring many other responsibilities whilst cramming evaluations.

The target then becomes nothing more than another box to tick as team leaders struggle to cram evaluations in at the end of the month. The emphasis shifts to meeting the target rather than paying attention to the patterns and insights available in the evaluations.

> It's essential to be able to track evaluator performance on a weekly basis and use automation to remove any selection bias or gamification from the process.

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Language Matters

To ensure evaluators are all on the same page, the language used in evaluation forms has to be considered and objective.

Loose terms like 'good' and 'bad' when scoring performance lead to inaccurate and useless data as most individuals have inconsistent definitions of these terms.

Try using language that allows the evaluator to quantify interactions more easily, and use calibration and training sessions to ensure everyone has a common understanding of language used in the quality process.

Adherence Fatigue

Compliance is almost always part of the quality process, and needs to be measured stringently to ensure compliance with industry legislation.

Process adherence is also an important part of the evaluation process, but compared to compliance, these processes are often defined by the business and far too rigid. This gives the agent very little room to tailor their approach to the customer when necessary.

Process adherence guidelines often insist that the agent uses specific language that doesn't always fit the context or flow of the conversation, creating an uncomfortable or unnatural tone for the customer and agent alike.

To create the best customer experience possible, give your agents some autonomy over how they interact with customers.

Conduct a Field Test

Once you have created your evaluation form, test and calibrate so you know it captures data that's accurate enough to govern the rest of the QA process.

Ensure that all relevant parties in the organisation have a say in whether the form is valid and fit for purpose - at this stage it is important to involve agents as they can often deliver frontline insight that management may miss.

Agents who are involved with the design process are invested and engaged with QA.

Tips For Developing an Effective QA Scorecard

✓ Define what's most important for you to evaluate:

✓ Compliance

✓ Process adherence

✓ Customer satisfaction

✓ All of the above

✓ Create your scorecard so it distinguishes 'failure' fairly - throwing this term about can have a negative impact on agents.

✓ Structure your scorecard so that the criteria refer to the narrative of a typical customer interaction - this can drastically reduce the time to complete an evaluation and increase efficiency.

✓ Make sure the language on the form is as clear, objective and prescriptive as possible - avoid words like 'good' and 'bad'.

✓ Seek input from agents, the QA team and team leaders alike - test the form and get buy-in from your staff for optimum engagement.

✓ Test the scorecard and review after two months

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Optimising the QA Process

The evaluation process is the actual activity that evaluators undertake when scoring interactions against your QA scorecard. This generates the data that determine the next steps in the QA process, allowing you to answer important questions like:

- Is the business meeting compliance standards?

- What kind of training do agents need?

- How can we improve our customer interactions?

- What are my agents particularly good at?

- Are we measuring the right things?

Contact centre managers often believe that investing in the latest automation technology is the key. Whilst employing the latest auto-transcription, automated scoring and workload assignment tools can give you a significant advantage, however, it's the human element in the evaluation process that generates the most value for your agents.

Improving the evaluation process means continual evolution through regular reviews that consider customer feedback, business changes, and input from your QA team.

Some contact centres leave their QA scorecard unchanged and unchallenged for years. Others try to replicate the structure of a scorecard for one department into another, rather than spending time creating a tailored, analytical form that serves the unique needs of that particular business function.

Your QA team needs to be open, fair-minded, objective and consistent.

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What Does an Effective Evaluator Look like?

A lot of contact centres often choose their QA team from successful agents with a consistent track record. Good performance as an agent, however, is just one factor in determining what makes an effective evaluator.

When selecting your quality team, look for individuals who are:

✓ Calm

✓ Detail orientated

✓ Able to concentrate

✓ Impartial

✓ Consistent

✓ Customer focused

✓ Organised

✓ Methodical

It might seem like relying solely on humans to make objective decisions regarding colleagues' performance is counter-intuitive, but there are several ways to ensure your QA team evaluate consistently and fairly.

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Us and Them

Calibration serves as a key element in making sure all evaluators have a unified understanding of quality measurement, but one of the biggest issues can often be a social divide across contact centres.

We often see a 'us and them' attitude between the evaluators and the evaluated which leads to resentment, a lack of understanding, and ineffective feedback conversations after the evaluation process.

To prevent this, it's essential to get agents involved in the quality process - ask for their opinion, give them insight into exactly what they're being assessed against.

Agents, team leaders and quality team evaluators should all be able to comfortably challenge the evaluation process where appropriate. This encourages interaction between evaluators and the evaluated, breaking down barriers and supports greater understanding of the evaluation process.

With a clear and common understanding of the evaluation process, everyone can be held accountable for their own performance.

Tips for Optimising the Evaluation Process

✅ Define exactly what kind of elements of interactions you'd like your quality process to address and answer. Finding out what you want to achieve will help you tweak and perfect your evaluation process to deliver deep insight.

✅ Keep in mind that technology and optimisation isn't the key to improvement, leverage the human qualities like perception, intuition and fair judgement from your quality team.

✅ Select a quality team that's full of open, fair-minded, objective and consistent individuals. Remember; successful agents with a consistent track record won't always make an effective evaluator.

✅ Avoid the typical and dangerous divide between the quality team and the rest of the organisation - get team leaders and agents involved in the QA process wherever possible.

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Maximising the impact of feedback

Evaluating quality the right way creates a wealth of data you can transform into feedback that improves performance. By gauging current agent performance and business-wide standards, you can guide staff towards delivering the best service possible.

Without feedback that is effective, clear and structured, you can't communicate to agents exactly what you want from them - and more importantly, what they can do to improve.

The first step in maximising the impact of feedback is to ensure all those who are delivering it are equipped with the skills to do so in an effective way.

Delivering feedback shouldn't be something that only happens once a year during an annual performance review. Instead, see it as a continual process that relies on a mixture of course correction and advice for those struggling, and praise for high-performing agents.

Many contact centre leaders assume their managers have an innate ability to deliver feedback with impact, but this is rarely the case - especially when trying to communicate something negative. It's the responsibility of contact centre managers to know what they want agents to achieve and exactly what they can do to empower them.
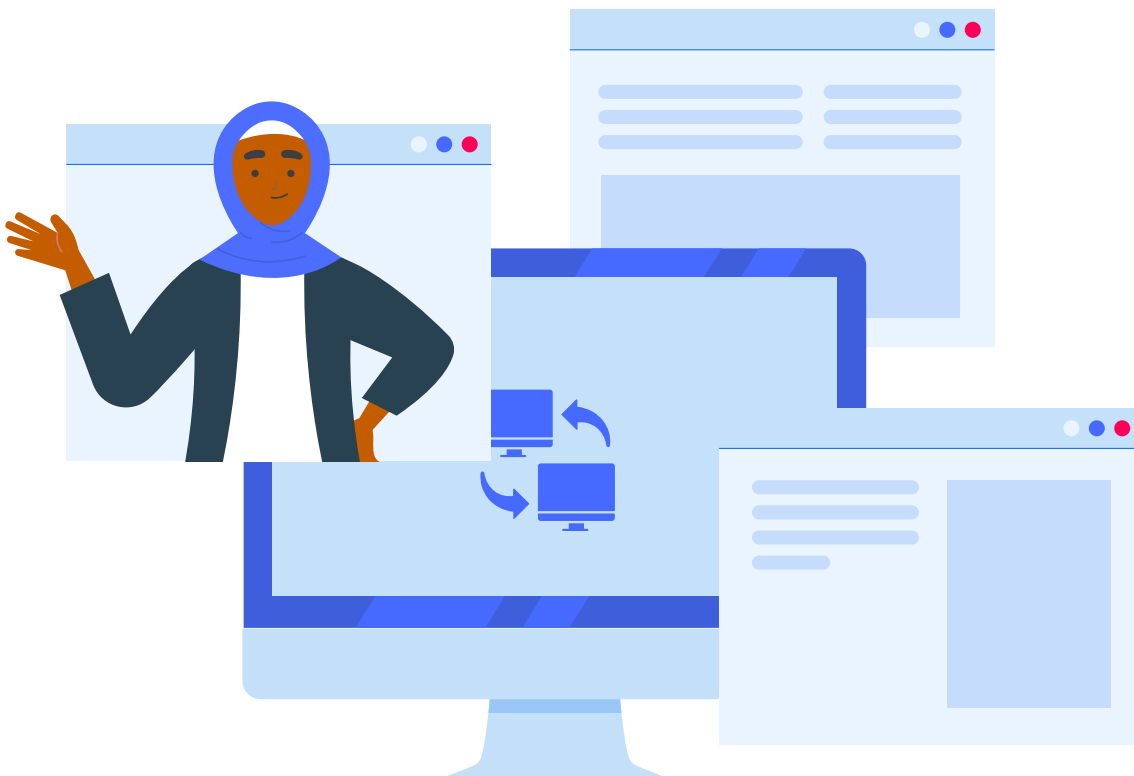
Customer Insight

You should always gather feedback from your customers. For example, customer satisfaction surveys are an excellent way of effectively gauging interactions between customer and agent. Customers tend to be very specific in their comments if an interaction has been positive or negative, and can deliver additional useful insight.

A Positive Attitude

Delivering feedback on improvement areas is often one of the trickier parts of the process. Using affirming and positive language in these conversations, however, exponentially increases the chance they will result in mutual understanding and growth.

The key to achieving this is by using QA software that offers agents immediate access to quality guidelines and results of previous evaluations, all in one place.

Giving everyone real-time access to their individual performance data creates a collaborative approach where agents know exactly what's expected of them. They're therefore more open to receiving and acting on feedback to improve performance.

Efficient Grouping

Delivering feedback and coaching on an individual case-by-case basis is one thing. In an environment where time is precious and quality issues can be far reaching, however, it is hugely important to use QA software that identifies common patterns in agent performance across the business.

This makes it possible to group individuals together for coaching sessions based on their needs, even if they belong to different teams. It's also a great way to mix things up, allowing high performers to help those who need to improve. Peer power should not be underestimated.

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Tips For Delivering Effective Feedback

✅ Make sure your managers have the right skills to deliver effective feedback. Do they need training?

✅ Keep in mind that the only opportunity to give feedback isn't during an annual performance review, treat it as a continual process that occurs regularly.

✅ Ask your team leaders to understand exactly what the business expects from agents, and what they can do to empower them to achieve that.

✅ Remember that negative feedback doesn't have to mean a negative conversation - centre discussions and feedback sessions around opportunities to learn rather than failures.

✅ Focus on the things that went well and provide consistent, positive reinforcement

✅ Use a system where agents have access to both quality guidelines and the actual evaluations - real-time access into their performance creates collaboration and transparency.

✅ Find a solution that can assess which individuals need coaching in which area, and where possible group them together for crossteam sessions in order to maximise efficiency and effectiveness.

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Calibrating for a common understanding

In the contact centre, calibration is the most effective method in achieving a common understanding about which elements constitute a successful interaction. This usually involves the QA team and team leaders discussing specific customer interactions to come to a consensus regarding quality.

Calibration sessions are absolutely essential as they ensure all evaluators are aligned and can apply a consistent definition of quality across all interactions.

Collaboration is Key

Calibration is often a top-down approach that involves a senior member of the contact centre imposing their personal standards, opinions and perceptions on the rest of the team to follow.

The key here is to adopt a much more collaborative approach that draws on the experience of individuals from every position in the contact centre, including agents.

Enthusiasm and engagement from participants in calibration is essential to its effectiveness, so allow staff to select interactions to evaluate. This way they'll have ownership over the process and will buy into calibration from the start - and you avoid the perceived selection bias for negative interactions by doing so. It's a great opportunity to identify what agents are doing to go above and beyond, and exceed the customer's expectations.

Involving team members from all parts of the business ensures calibration conversations are not just focused around internal expectations and process adherence, but rather which elements of an interaction really add value to the customer experience.

Tips for Optimising the Evaluation Process

✅ Keep in mind that calibration sessions are always about finding the most effective common understanding of quality between all parties - not just the QA team.

✅ Ensure senior members of staff don't impose a top-down definition of quality on the rest of the organisation. By all means, draw from experience, but encourage a collaborative approach where everyone's input is valued.

✅ Allow staff ownership over the calibration process to encourage buy-in and engagement from the start.

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Conclusion

As the contact centre industry becomes increasingly competitive and customer expectations continue to rise, service and the customer experience will grow to become the key differentiator between businesses.

There is currently little to differentiate the customer experience that businesses in sectors like banking and energy offer. The opportunity to create a brand that stands out lies almost solely with customer service.

Instead of being a simple necessity to handle incoming customer inquiries, contact centres will transform their roles to become central to the experience your organisation offers its customers.

The only way leading contact centres will be able to assume this vital position is not through simple workforce optimisation, but workforce engagement.

Getting Everyone on the Same Page

This means stepping away from quality monitoring as a box-ticking exercise, and making sure the entire process is developed and calibrated to deliver actionable feedback to agents, and reveal meaningful insights to the rest of the business.

Inclusivity is the key - contact centre leaders are now tasked with defining exactly what quality means to them, developing a way to capture and measure that effectively, and ensure staff at every level in the organisation are included in defining and improving the QA process.

Through achieving buy-in and securing engagement from management, the quality team, team leaders and agents alike - customer satisfaction will soar, costs will start to decline, and internal processes will be met.

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Transform your contact centre using smart quality

Traditional quality management often seems like a tick box exercise to contact centre leaders. This makes them dismiss its value to their operation.

To offer a standout CX to customers, however, your contact centre needs to take a smarter approach to QA - one that blends the latest in AI and automation with the engagement and empathy only the human touch can bring.

That's why Puzzel has created a new 'Smart Quality' approach to QA. This combines the speed and performance benefits of the latest automated technologies with an empathetic, human-led approach to QA evaluation processes that agents respond well to.

It's how hundreds of Contact Centres across the globe are increasing their quality scores

It's how Atos ran over 10,000 coaching and feedback sessions in just six months.

It's how NS&I improved customer satisfaction 3% in just three months, with a 10% reduction in average call time.

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About Puzzel

Puzzel is the leading European provider of cloud contact centre solutions. Every day, more than 1,100 organisations across 40 countries use our software to deliver smart customer experiences, blending the powers of people and technology to serve customers efficiently, effectively and with empathy. The Puzzel Platform enables organisations to create rich journeys for their customers, with a mix of live and self-service experiences that give people the freedom to choose when, where and how they get help. Artificial intelligence is harnessed at every touchpoint to automate tasks, provide insight, and personalise service and support. Puzzel also includes a suite productivity and planning tools to empower managers and agents to reach their goals and continuously improve performance. With 20+ years of experience in the industry, Puzzel is the CCaaS (Contact Centre as a Service) provider organisations trust when every moment matters.

For more information, please visit **www.puzzel.com**.