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TOP 20 BEST PRACTICES FOR CALL CENTER QUALITY ASSURANCE

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At VereQuest we have had the pleasure of conducting Contact Center QA for many of N.A.'s leading brands since 2002. Over this time, we have listened to or read well over a million customer interactions and we have come to understand what is important when crafting a successful QA program. This guide highlights the top 20 characteristics of a best practice QA program.

NOTE: We have written this from the perspective of conducting QA on calls – however, it is equally important to implement QA for emails, chat or social media interactions.

1. CURATE YOUR SCORECARD

The Standards, that collectively make up your unique QA Scorecard, are the expectations by which your customer interactions will be measured. This is by far the most important (and challenging) part of the QA process.

While some Standards focus on common courtesies or compliance requirements, your Standards should come together holistically to create a unique customer experience that is branded to your organization and what it is that you promise to your customers. To do this well, you may want to engage support from your Marketing team to better understand your company's brand attributes and what will make the experience uniquely yours.

#	%	Standard		Shortfalls	Description	Sounds Like (SL) and/or Best Practice (BP)
10	10%	**You treated me with genuine care + concern**	GENUINE	***On Standard***	• I felt I was having a dialogue with a real person who genuinely cared about me and my needs.	
				No timely empathy/ignored emotional clues.	• I had an obvious emotional response (positive or negative) but the Specialist did not empathize or reflect back any of the emotional content of my situation. • I expressed an emotion and/or "clue" and the Specialist did not acknowledge it and/or did not leverage this information to build rapport.	• *BP: "I understand this is frustrating for you."* • *BP: "Congratulations on your new house."* • *BP: "I can hear that you're upset. Let me do what I can to help you with this."* • *BP: "A trip to Europe? You must be very excited."* • *BP: "I'm so sorry to hear that" "That must have been difficult for you."* • *BP: "How frustrating for you!"* • *BP: "That's exciting!" "What does that mean for your position?"*
				Did not appear genuine	• The Specialist didn't sound authentic. He/she sounded fake and/or insincere. • I didn't feel that my personal interests were driving the conversation.	
				Specialist sounded scripted	• The Specialist was telling me about a product/service and it sounded like they were reading it from the brochure. • NOTE: OK if reading compliance info and informing caller in advance.	• *BP: "Let me read this to you just to be sure it is accurate…"* • *BP: "I need to read you some standard legal information right now… OK?"*
				Didn't apologize for error or complaint	• Regardless of who made the error or mistake, the Specialist did not offer an apology.	• *BP: "I apologize for that. What can I do now to help you?"* • *BP: "I am so sorry to hear that. Let me see what I can do to help you".*

It is important to come to an agreement on the Standards … and then stick with them. It may be okay to 'tweak' some of the words or explanations, but you don't want to change them in a material way more than once a year.

Once you have arrived at your Standards, document them well. Typically, we like to include: a description of what it sounds like when the Standard is followed and when it is not along with some best practice examples. The more specific and detailed the better. You want your frontline supervisors, trainers, QA analysts and the agents to be able to read the description and be absolutely clear about what is expected.

Having a detailed Standards document (also referred to as a QA Scorecard) will bode well for you when it comes time to conduct calibration sessions.

2. PRIORITIZE YOUR STANDARDS

Not all Standards are created equal. That's why Standards should be weighted based on their relative importance to the customer experience. You may also want to increase the weighting for those Standards where you see greater opportunity. For example, if you believe that 'expressing empathy' is core to your brand -AND- your team is having trouble remembering to offer empathy then you may wish to increase the weighting on this Standard. Whereas, using the customer's name (for your company) may not change the feel or outcome of the call and could be weighted lower.

3. PLAN TO CAPTURE VALUE-ADDED INSIGHT

When you are delivering QA results, it is always important to provide context. So, for example, it is important to know if low QA results were related to a particular type of call. Or if a specific skill was consistently missed under certain circumstances (e.g. irate and demanding callers). Capturing a level of detail with each evaluation will help with your analysis.

In addition, if your QA system allows for it, consider capturing other insight that may not be related to agent performance. For example, the reason the customer had to reach out, whether or not they had tried to resolve their issue previously, whether or not the customer was transferred or referred elsewhere and why, etc. This valuable information will be key to removing effort from the customer's experience and help to identify opportunities for self-serve as well as the root cause for escalations.

4. RECORD YOUR CALLS

If you aren't already doing so, you will want to record your calls. Conducting QA on live calls can be challenging and will not allow you to easily choose the right calls to evaluate (see Sample). There are a number of cost-effective options available, many of which come as part of your telephony solution.

5. SET YOUR GOALS

I am often asked "What should our target be? 80% 90%?" It is important to go back to your Standards and how you have weighted them. If your Standards collectively come together to create the best possible customer experience, then why would your standard be anything less than 100%? True, it may not be possible to get there right away and so you may want to introduce interim goals of 80%-90%. The important thing to reinforce is that every one of these Standards matter. If they don't, then remove it from your list of expectations.

6. ALIGN YOUR TRAINING

A key element of ensuring your QA efforts are successful is to make sure that your training aligns perfectly with the expectations you have outlined in your Standards. It will not bode well for you if your agents are being trained on one thing, and you are evaluating them on something different. Make sure that the language, models and approach included in your training aligns with what your Standards dictate.

You may also want to allow some time to conduct refresher training to ensure everyone understands and can demonstrate the Standards they will be measured against.

7. CHOOSE CALLS TO EVALUATE

Before you start the selection process consider why are you conducting QA. There are typically two main reasons:

(1) To create a measure/score of individual agent quality and performance; and

(2) To develop a greater understanding of how to improve the customer experience.

Random Sampling is good for evaluating individual agent or team performance and is best suited if agents are being rewarded based on QA results. The main benefit of this approach is that the interactions you are choosing for evaluation are not skewed in any way toward good, bad, complex or easy interactions. The sample chosen is representative of all the interactions. You may still encounter opportunities to improve the customer's experience and so make sure you are keeping track.

When you select interactions to evaluate, you will want to distribute them equally across a month (divide by 4 weeks) so you are incorporating any variances from time of day, day of the week, or time of the month. Once you have selected them, you will want to make sure that you are able to complete the evaluations in a timely manner. It will be difficult for an agent to remember a customer interaction from the 3rd of the month, when you present your QA evaluation to them on the 27th of the month. More importantly, if you have identified key behaviors that need to be corrected, you don't want to wait 3 weeks before letting the agent know about them. (Also see KPIs)

Spot Checking, which is typically done in addition to Random Sampling, focuses in on interactions that fall outside of the norm. They may include interactions which, for example, are longer in length, involved multiple transfers, had several holds or dead air or fall within an escalation queue. These types of interactions may direct you to a problem (agent or product/process/procedure) that can highlight opportunities to improve the customer experience. In addition to capturing key areas for performance improvement, dig deep and uncover the root cause (people, product or process).

NOTE: If you have speech analytics in place, it offers an excellent shortcut to identifying calls that are anomalies which warrant a listen.

8. UNDERSTAND THE TIME INVOLVED

The time required to conduct QA is driven by several factors:

(1) How long will it take to locate the interaction? This isn't as straightforward as it may seem given search parameters, vacation time, varying schedules, etc.

(2) What is the talk time you are targeting? If you are doing a Random Sample, then target something in the range of the Average Talk Time. For example, if your ATT is 6 minutes then target calls in the 5-7 minute range.

(3) How complex and/or long is your QA Scorecard? Does your QA Scorecard help minimize the time related to capturing details by way of dropdowns or pre-populated fields?

(4) How much coaching are you providing? Ideally, your QA evaluation should include free-form comments related to what was done well and areas for improvement. These should be written for the agent but may be used by their coach.

(Example) This is how a 15-minute QA evaluation may be broken down:

Time to Retrieve Call / Tracking	Call Length	Time to Complete Scorecard	Time to Complete Coaching Notes
2 minutes	5 minutes	3 minutes	5 minutes
Keeping track of who you are doing a QA evaluation for. Accessing a suitable call (e.g. weeding out internal calls, not finding calls for an agent who is away or skipping calls that are inappropriate to QA).	Listening to the call.	Typically, you would complete the Scorecard while listening to the call. This is the incremental time needed to complete the Scorecard.	This is the time needed to compose the key learning and coaching from the interaction.

NOTE: If you have designed your Scorecard correctly and your QA system is well designed, you should not have to go back and re-listen to every call to make sure you have captured things correctly.

9. DECIDE THE NUMBER OF CALLS TO EVALUATE

This is the most frequent question asked and the most challenging to answer in any other way than 'It depends'. We have worked with clients who do well with as few as 3 evaluations per month per agent (highly tenured agents) to as many as 12-20 evaluations per agent per month (new hires in a complex environment). The goal is to evaluate as many as you can within the limits of your financial and QA resources.

We suggest determining the maximum number of evaluations you can handle and then allocate them among agents on a monthly basis based on:

(1) An individual agent's performance. If an agent has been performing consistently well over a long period of time, they will require fewer evaluations to sustain that level of performance than a new hire who is struggling.

(2) The complexity of the work. If an agent is on a blended queue with a wide variety of products or service requests, then it would make sense that they would require more evaluations to cover all possible scenarios. Whereas an agent who may be on a specialized queue where most calls are of a similar nature and call flow, would not require as many evaluations.

Here is another way to think about it:

Criteria	Example 1	Example 2	Example 3	Example 4
Interactions handled per agent per day	20	30	40	50
Interactions handled per agent per month	400	600	800	1000
QA Evaluations per month	8	8	8	8
QA Evaluations as % of total interactions	2.0%	1.3%	1.0%	0.8%

Conducting 8 evaluations per month may be sufficient if an agent is handling lengthy calls that have a fair number of holds or transfers (Example 1) or in an environment where every interaction follows a consistent flow (Example 4). Eight evaluations may also be enough for a tenured agent who is performing consistently well in a complex environment (Example 3), but it would not be adequate for a new agent coming into that same environment.

NOTE: You may be convinced that you can conduct QA on 100% of your calls using speech analytics; however, for most organizations, speech analytics hasn't reached that level of sophistication (yet). Rather best practice organizations leverage speech analytics to help identify the sample calls for monitoring and/or use speech analytics to help identify why customers are calling.

10. ESTABLISH QA KEY PERFORMANCE INDICATORS

Just as most functions have KPIs, so too does a best practice QA function. These may include: (1) Timeliness and (2) # of Disputes.

NOTE: If you are reporting QA results on a monthly basis, plan to complete all the QA with 5 days to spare to allow disputes to be resolved before you tally results for the month.

11. BE SPECIFIC

If you have designed your Standards well and chosen your QA System judiciously, it will pay off in spades when it comes time to conduct your QA.

Although it may be tempting to only monitor certain components of the interaction, you should listen and/or read to the entire end-to-end interaction. The context of what is said and/or done is important to gauge the overall experience.

As you listen to the interaction, keep your best-practice Standards at the forefront. Then, as you hear the agent deviate from the Standard capture that behavior in the QA Scorecard. As you note any behaviors that are off the Standard, be sure to capture it in free-form notes in verbatim fashion for clarity and coaching support -or- if your QA System allows for it, select the specific off-standard behavior from the dropdown. The more specific you can be, the better able agents will be able to change their behavior. Providing a simple Yes or No response is not sufficient.

How robust your coaching direction needs to be is based solely on whether or not the QA evaluations will go directly to the agent or to their supervisor. NOTE: Most organizations do not provide QA evaluations directly to an agent unless they are tenured and performing consistently well.

Focus on the positive as well as the negative. If your QA process only highlights what agents are doing wrong, then you will be missing a key opportunity to reinforce what they are doing right. Best practice QA ensures that every evaluation includes coaching notes related to what was done well in the interaction as well as opportunities for improvement next time.

Be sure to save 'best practice' calls you encounter to use in coaching and training and make them available to everyone by way of a Best Practice Library.

12. CALIBRATE

Calibration is the act of coming together as a group to review interactions against the Standards to ensure everyone is consistently interpreting the Standards. This can be a session between an agent and their supervisor, a group of QA analysts or a multi-functional team. Regardless, calibration session should occur at least weekly until consistency has been achieved and then at least monthly thereafter. Calibration is particularly important if you have outsourced your QA function.

In addition to regular calibration, best practice QA teams take the time to conduct quality assurance on each other's QA. The more accurate and consistent the QA, the more likely your frontline teams will accept your feedback and act on it.

13. COMMUNICATE. A LOT.

For your QA program to be successful, getting buy-in from frontline agents and their supervisors is imperative. The best way to do this is to engage them early in the process. It makes sense to involve them when creating your Scorecard and to help develop best practice examples, sample scripting, etc. Remember that your Standards must be able to be reflected in the real world and so their experience will be invaluable.

Once you have developed your Scorecard, make sure that everyone is aware – well in advance – of how you will be approaching QA. We recommend providing them with a copy of your Standards document, organize workshops to practice any new Standards or skills you may have added or revised, and have teams listen to calls together and evaluate them against the new Standards. Welcome any questions or issues and discuss them with an open mind. If you can remove any doubt from the process early on, then the number of disputes you receive will be minimized.

And finally, it makes a lot of sense to have a trial month where you can compare past results with results using the new Scorecard and work out any issues with the QA process itself. Importantly, this trial month enables the QA team to become more familiar with the Scorecard and work on the quality of their evaluations.

14. ALIGN QA RESULTS WITH CUSTOMER SURVEY RESULTS

If you have access to company survey results, you may want to leverage this information to confirm that your QA results are aligned. As a word of caution – The survey results you have access to may be predominantly skewed to another channel (e.g. branch or retail) or for a different function (e.g. sales vs. service). Regardless, it will give you an indication as to whether or not you are in the same ballpark. If your contact center scores are consistently high but corporate survey results are very low, you may want to revisit what it is that you are measuring. The reverse is also true.

15. ESTABLISH A QA DISPUTE PROCESS

The goal of a best practice QA function is to ensure that every evaluation (1) adheres to and aligns with the Standards exactly and is (2) unbiased. That may not always be the case. There will be times when an agent or supervisor will receive an evaluation that they will disagree with. It is important, therefore, to have a dispute process in place.

The first step is for the agent's Supervisor to review their complaint and confirm (or not) that the dispute is legitimate. That's where having the Standards well documented will be helpful. If the Supervisors agrees with the agent, then it will be the job of the QA analyst to review the evaluation. If he/she agrees, then a simple correction will suffice. If not, then you will want to convene a calibration session to review the call. Make sure that, when warranted, you update and/or embellish the Standards to reflect any changes that may arise from the calibration session.

16. ACQUIRE SPECIALIZED QA TOOLS

If you are thinking about doing QA using a spreadsheet or basic survey-type tool that you can get for free on the internet, then think again! The time you spend doing basic reporting will more than offset the cost of a QA tool.

Want to get a sense of what a specialized Contact Center QA tool could offer? Go to https://www.verequest.com/contact-us to schedule a no-obligation demonstration of VQ Online™.

The telephony software you have may provide some basic quality assurance features, however, if you are thinking about doing QA on email, chat, or social media as well (today or in the future) you should consider acquiring software specifically designed for contact center QA.

Here are just a few things to consider when choosing QA software:

(1) Does it support a multi-channel experience?
(2) Is it easy to use and take into consideration how QA is conducted?
(3) Does it offer robust online reporting and easy-to-access offline, adhoc reporting?
(4) Can it easily scale and cost-effectively handle growth? Will you be hit with increased user fees as you grow?
(5) Given that most of your customer interactions will contain Personally Identifiable Information (PII), does the system offer the level of security your organization needs for compliance purposes?
(6) Does it have support tools to help manage the QA process and track the number of evaluations to be completed by individual agent?

NOTE: Specialized QA software is typically provided at no charge when you outsource your QA.

17. COACH. AND THEN COACH SOME MORE.

Having a robust QA function is only the first step to improved performance. Quality Assurance, combined with just-in-time Coaching, is all about building and reinforcing the right habits that enable agents to deliver the best possible customer experience consistently. Unfortunately, it can sometimes feel like a game of 'whack a mole' as some poor behaviors are corrected only to pop up again a few weeks or months later. With this in mind, agents require constant monitoring and coaching.

No matter the reason for doing QA, QA and Coaching should never be punitive. Rather best-practice coaching is self-directed -- allowing the agents to self-discover areas for improvement with your guidance and support. This ensures they take responsibility for their own development over time.

That's why it is important that your QA system provides you with insight into trends – both at the center, team and agent levels – that you can then put into action through coaching and/or training.

Unsure about the quality of your Coaching? Check out VereQuest's Self-Directed Coaching Program. https://www.verequest.com/contact-center-training

While compliance-related issues should be addressed immediately, it is the 'trends' in performance that will deliver the greatest payback. So, for example, if you are seeing a trend in a specific agent's behavior, then one-on-one coaching will likely be the best option. Whereas, if you are seeing a trend across a team or center, then consider classroom or eLearning refresher training for everyone.

18. REWARD PERFORMANCE

Leveraging the QA score for pay-for-performance is a great way to focus employees' attention on what matters most. However, the QA score should be only a component of the measures use to reward performance. Consider combining it with sales results, schedule adherence, customer satisfaction survey results and other key indicators that are critical to your business.

It's important to note that recognizing outstanding performance doesn't have to be monetary in nature. Recognizing top performers by sharing best-practice interactions, adding their achievement to a newsletter or calling them out in a monthly meeting can be equally gratifying.

19. IMPLEMENT QA ACROSS CHANNELS

You may be surprised to know the number of companies who do not conduct QA on channels other than voice. However, as customers embrace a wide variety of channel options, overseeing quality is equally important on all channels.

If you are working across channels (voice, email, chat, social media), then your Standards should be consistent – albeit tailored – to each channel. The same rigor you used to develop your Standards for call evaluations should be applied to Chat, Email or Social Media. So, for example, the Standards for Voice may be different in many ways from Email, Chat and Social Media but the same branded elements should be in place.

(Example)

Standard	Calls	Chat	Email	Social Media
Greeting	✓	✓	✓	N/A
Courtesy	✓	✓	✓	✓
Timeliness	Average Speed of Answer / Dead Air	Responsiveness	Turn-around	Turn-around
Questioning	Combination of open/closed	More closed	Must be efficient	Must be efficient
Empathy	✓	✓	✓	✓

It is also important that you consider the value of consolidating QA onto one QA system. This is particularly important if agents are working on more than one channel.

20. CONSIDER OUTSOURCING YOUR QA

If you are challenged by how you are going to commit to a robust coaching effort or if running a QA program seems daunting with everything else you have to do -- then you may want to do what many best-in-class organizations do and investigate outsourcing your QA function. In addition to freeing up valuable internal resources for coaching, outsourced QA can provide you with an external perspective (more closely aligned with a customer's point-of-view) that will help remove the bias you're your internal QA.

It makes sense that internal QA may be somewhat biased – internal QA analysts simply know too much about what is happening in the organization and the individual agents they are evaluating. Research suggests that internal QA can be as much as 30% higher than reality.

For detailed information about how to Outsource your QA and the benefits, download our Playbook at: https://www.verequest.com/verequest-resources

GET TO KNOW US!

VEREQUEST is a consulting firm specializing in driving and sustaining the quality of the customer experience in the contact center environment. We help our clients, each a leading organization in N.A., to strive to win the hearts and loyalty of customers through a wide range of proprietary tools and techniques.

Our outsourced Quality Monitoring solution pairs VereQuest's highly skilled Customer Insight Specialists with our proprietary quality monitoring technology VQ Online™ to capture the level of detail you need to understand the motivations and experiences customers have when interacting with your call center — across all of your channels (calls, email, chat, video, etc.). This same technology is available in a cloud-based, SaaS model for internal quality monitoring teams.

Our quality monitoring solutions not only informs coaching at the agent performance level but can also provide valuable insight needed to build innovative and differentiated solutions to improve your customer's experience.

Get in touch with us today for a no-obligation demonstration and test-run of our high-quality evaluations and coaching.
To register, go to:
https://www.verequest.com/quality-assurance-assessment