



VEREQUEST

Helping companies keep the promises they make®

A Guide to Outsourcing Your Contact Center's Quality Monitoring

Introduction 4

Is Outsourced QM right for my business?..... 6

- When is outsourcing not a good fit?
- Top 10 Outsourced QM benefits
- Determining which part of the QM process to outsource
- Evaluating the performance of your outsourced contact center
- Aligning agent behavior with a great customer experience

Choosing an Outsourced QM Partner 12

- Onshore or Offshore?
- Privacy and Security
- Outsourced QM Partner Checklist
- Leveraging your QM Partner's technology

ROI – What to expect..... 17

- Determine what you want your QM Partner to do
- Calculating the cost of an internal QM Specialist
- Calculating the QM time required
- Other costs to consider when outsourcing
- Calculating ROI

Getting Started..... 24

- Things to do before you launch
- The Scorecard
- Determine who will have access
- Should agents have direct access?
- Communicating with Stakeholders

After the Launch: What comes next?..... 30

- The First 30 Days
- 60 – 90 Days
- 1 Year

Why Consider VereQuest?..... 33

- What's different about VereQuest?
- What some of our customers say about VereQuest QM
- Free trial



www.verequst.com

info@verequst.com

1 866 920 2011 x222

Why read this eBook now?

In today's business environment there is no question of the value of quality monitoring and its role in driving an improved customer experience. The challenge remains how to 'do more with less' – less resources, less budget, less time. It is critical to look at the value of quality monitoring – not just from a check-the-box agent performance effort – as a vital tool for tapping into what is happening and where the opportunities lie within your organization.

In this eBook, we'll examine the benefits and ROI for outsourcing your quality monitoring efforts as well as things to consider should you choose to outsource. It is our hope that, in the end, you'll have all the information you need to make an informed decision about whether to outsource or keep your quality monitoring in-house.



Why re-evaluate your QM now?

- ✓ Customers are evaluating their experience with YOU and comparing it with their own personal experiences with companies across all sectors. It's no longer good enough to be best-in-your-own-class. Having a third party perspective will help close the gap.
- ✓ Customer expectations have been changing ... rapidly. Not only do you need to raise the bar to meet their expectations, you need to be tapped into their changing expectations so that you can meet them tomorrow. It's time to think outside-of-the-box and re-evaluate how you are engaging customers.
- ✓ We are all being asked to 'do more with less'. That's not going to change. It's important that you are able to demonstrate real value to the organization through your quality monitoring efforts. Do you have the right tools, training, management, etc.?



Just to be clear ... contact center quality monitoring involves:

1. Evaluating a customer interaction against pre-determined criteria for quality, compliance, sales effectiveness, etc.
2. Highlighting best practices, opportunities for coaching and grievous customer situations.
3. All contact center channels including calls, emails and chat interactions.
4. Analyzing data captured for agent performance, business insights or both.
5. Calibrating results to ensure they align with the reality of the customer's experience.



Outsourcing quality monitoring involves:

- Engaging a third party to do some or all of the above.
- Introducing an impartial point-of-view.



Is Outsourced Quality Monitoring right for my business?

There are generally three types of quality monitoring:

- (1) Customer Experience monitoring typically across all types of interactions;
- (2) Sales effectiveness monitoring to ensure every sales opportunity is being maximized; and
- (3) Compliance monitoring to ensure legal, regulatory and/or procedural guidelines are being followed.

If you monitor the customer's experience and/or for sales effectiveness, then it almost always makes sense to outsource some or all of your quality monitoring to an independent third party.

When is outsourcing not a good fit?

Outsourcing your contact center's quality monitoring is almost always an option – regardless of the size of your business. However, there are a couple of pre-requisites worth noting:

1. **Recorded interactions** – It isn't absolutely necessary, however, providing your third party partner with pre-recorded interactions makes things a lot easier (and less expensive than live monitoring). That means providing your partner with access to your call recording system, email system and/or chat system. Typically this will be via a secure link (e.g. VPN) or, in some situations, you may be able to batch upload the interactions. This often requires the involvement of your internal privacy/compliance team and so make sure you plan for this.
2. **Confidential information** – Don't under-estimate the need to partner with a company that has a robust security infrastructure in place. Your interactions will often contain personal and confidential information. Therefore, you will want to do your due diligence on the outsourcer's ability to handle this information according to your organization/industry guidelines. If your outsourcer doesn't have a robust security infrastructure, look elsewhere. It is possible to outsource QM in highly regulated environments – but you need to understand what is involved.
3. **Complexity** – There are certain elements of the interaction that may be challenging (but not impossible) for a third party to evaluate. Typically this would be related to non-routine processes/procedures, advice, product questions, etc. If you want the outsourcer to evaluate this portion of the interaction, make sure you have a good plan in place related to how you will keep them informed and updated ongoing.



Top 10 benefits from outsourcing quality monitoring

Depending on your organization, the list of added-value benefits can be exhaustive. The following are the top 10 benefits companies who outsource their QM realize:



1. Access to Quality Monitoring expertise and best practices
2. Independent third party point-of-view; perspective closer to that of customers
3. Greater cost efficiencies (based on type of contract)
4. Online, real-time results
5. Consolidation of contact center QM efforts across all channels
6. Data capture to spot opportunities for improved customer experience, operational efficiencies, etc.
7. (VQ) Real-time measure of customer experience ... most valuable when you can't survey customers directly
8. Improved agent performance (Sales, Churn, NPS, etc.)
9. QM continuity during periods of high volume and/or contact center disruption
10. Less management time required



Determining which part of the QM process to outsource

Outsourced quality monitoring doesn't have to be an all-or-nothing arrangement. There are a number of ways to approach it. Choose one or a combination of the following options.

AUGMENT

Keep most of your QM in-house

Growing your internal QM department can be a challenging process given growing costs and/or stretched 'expert' resources. Leverage the support of a third party to supplement your internal QM efforts.

- ✓ Increase the volume of evaluations per agent
- ✓ Heavy-up the number of evaluations during periods of high growth, new hire training periods, new product/policy introduction, etc.
- ✓ Use your internal resources to evaluate compliance and accuracy and your external partner to evaluate the customer experience

ALL-IN

Outsource all/most of your QM

Outsourcing all/most of your QM allows you to redeploy valuable internal QM resources for coaching/training efforts or cost management measures. Frontline managers still listen to calls but only those that, after evaluation, offer insight related to coaching and development.

- ✓ Redeploy QM resources
- ✓ Remove responsibility for labor-intensive volume QM efforts from valuable frontline personnel
- ✓ Internal focus is directed toward coaching/training
- ✓ Your internal management emphasis is directed at improving outcomes ... not gathering data

CALIBRATION

Keep all of your QM in-house ... get some perspective

There are some environments where outsourcing QM is not possible or desirable. Over time, internal QM results can skew. Garner support from a third party to regulate your internal QM results.

- ✓ External QM experts review a sample of evaluations for alignment to pre-defined standards and a much-needed external customer perspective



Evaluating the performance of your outsourced contact center

You may have outsourced your contact center and, as part of their services, they conduct quality monitoring on their own work. Rather than just take their word for it, it makes good sense to engage an independent third party to validate their results and review how they are engaging your customers and representing your brand.

Outsourced QM – delivered by a third party – can provide you with the peace of mind that the results you are hearing about from your contact center reflect reality and that everything is on track. In addition, while the contact center's priority may be on agent performance, Outsourced QM can also capture, track and gain insight into opportunities for improvement outside of the contact center.

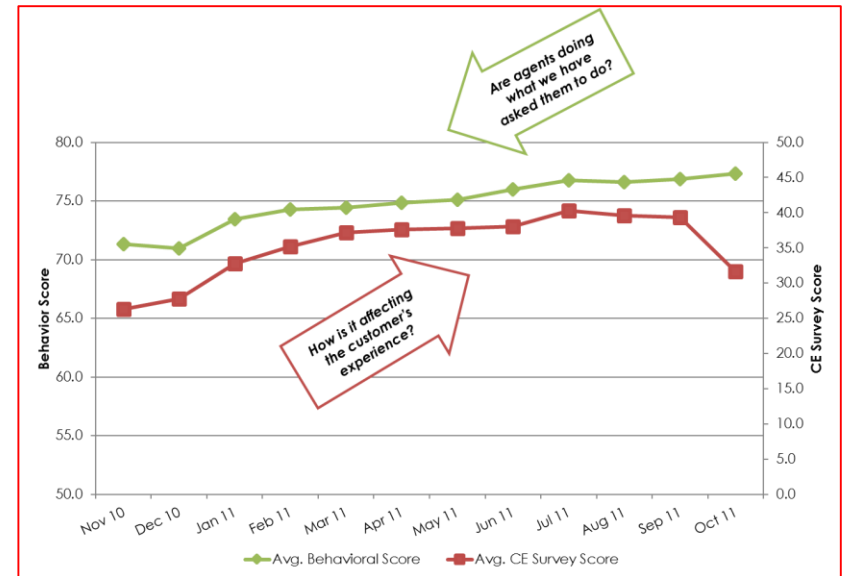


Aligning agent behavior with a great customer experience

When evaluating an agent's performance it is important to constantly reflect on what we are asking them to do (behaviors) and how it is impacting the overall customer experience. There are times when the two may be at odds. That's why it is critical to have a measure of both agent behaviors and the customer experience. Ideally we would survey every customer we speak with to gauge their opinion about our service and compare those results against our quality monitoring scores – however, that is both costly, time-consuming and sometimes impossible.

Best-in-class organizations – leveraging the right technology – take advantage of quality monitoring to capture not only how the agent is performing against pre-determined standards, but also how their behavior is translating into a good (or not so good) customer experience.

It is important that this evaluation be done from the customer's point-of-view, which is challenging if you are using internal quality monitoring resources. The key to success in this area is to calibrate the customer experience results you have gathered via quality monitoring with the customer surveys you do have to create a reliable proxy. What this means is that as you watch your CX quality scores go up, so too does your NetPromoter, CSAT or other measure of customer satisfaction.



NOTE: There are many organizations that are unable to survey the people they serve directly (e.g. sales prospects or arms-length relationships). The Customer Experience score associated with quality monitoring can be a key piece of information to help you understand these customers better. Make sure your Outsourced QM Partner has this capability.





Onshore or Offshore?

There are certainly some cost savings to be found in an offshore outsourced quality monitoring environment. For those environments that are highly scripted or for whom the 'check-the-box', 'black-or-white' approach to quality monitoring is sufficient, offshore QM analyst may work for you. However, most organizations are moving toward speech analytics for this purpose.

If you want a more customer-centric approach to QM, then it will be important that QM analysts have a clear line of sight to the market in which they operate. When evaluating customer interactions, understanding the cultural nuances your business lives in is important to get to root cause or underlying motivations that are critical to coaching effectiveness and operational efficiencies.

Deciding to stay Onshore for quality monitoring may require you to compromise quantity in favor of quality. However, leveraging QM for added-value insights can only improve your ROI.





Privacy and Security

There are a host of government issued regulations and policies related to the protection and security of customer data (PIPEDA, PCI, HIPAA, GDSR and more) – the same data that your outsourced QM partner will be listening to and/or reading. It is your responsibility to protect it.

At a minimum you will want to ensure that the data is hosted in a secure facility that is (at a minimum) SOC 2 compliant. The SOC 2 report is a regular third-party audit to certify that the company/system adheres to industry best practices when it comes to security, availability, processing integrity, and confidentiality or privacy.

And, in the event something goes wrong, does the QM partner have sufficient insurance and the right protocols in place to protect your organization?

You can't take the privacy and security of your customer and company data too seriously and so take the time to understand how the QM partner will be handling your company's most important information.



Outsourced QM Partner Checklist

- ❑ Can I see this company working as an extension of my contact center? Is there a good cultural fit? Do we share the same values?
- ❑ References. References. References.
- ❑ Does this company have experience in an industry sector that aligns with your own? It doesn't have to be the same but the customer experience needs to be similar.
- ❑ Does their company specialize in contact center quality monitoring? What is the background of the QM team including previous experience* and tenure? Is the QM team dedicated to my business? What is the hourly wage of their QA analysts?
- ❑ If you were their client, would you be an important client to them or simply one of many or a small client amidst large (more important) clients?
- ❑ Where is their site hosted? Do they have regular, independent audits of their site and data security (e.g. SOC 2)? Does their site undergo regular intrusion and penetration testing?
- ❑ Will they provide a best-in-class scorecard template upon which you can build and customize?
- ❑ Is their coaching well-written, actionable and meaningful? Do they offer real-time, added-value reporting?
- ❑ Do they offer 'just-in-time' escalations (critical coaching moments)?
- ❑ Is the service scalable for new hires, new campaigns, peak periods?
- ❑ Will I realize cost savings?
- ❑ Is it important that the QM team understand the local environment/culture? The industry? The geographic location?
- ❑ Can this company adapt to my unique operating environment?

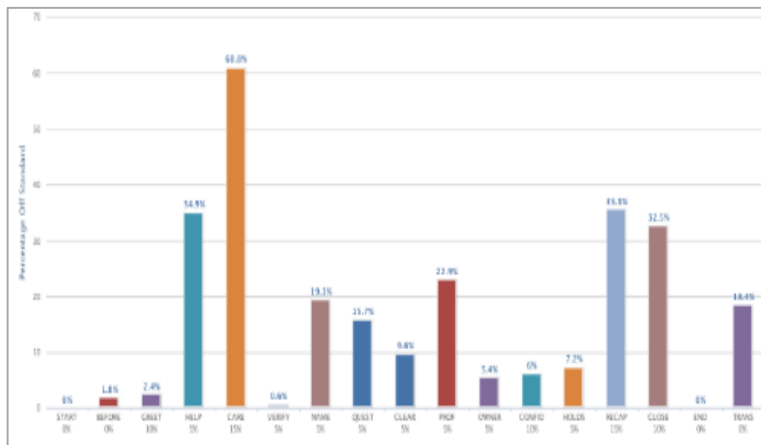
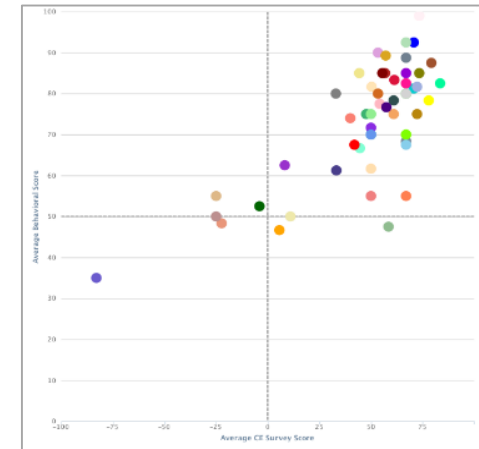
*When it comes to QM experience, think outside of the box. It is always more realistic to have a point-of-view that is customer-centric and not skewed by what they know about the internal workings of the company. There are real advantages to having a QM team whose background is *not* contact center related. Aligning the QM team with your target customer can give you more realistic insight.



Leveraging your QM Partner's technology

You may have a call recording system that has some built-in forms you can use for quality monitoring. And two other systems for email and chat. Given that the technology you may have is not specifically designed for quality monitoring, these 'free' tools can greatly limit the value quality monitoring can deliver to your organization.

Some outsourced quality monitoring partners have developed technology specifically for QM. This technology can offer you some real advantages, including but not limited to:



- ✓ Real-time, online reporting to highlight trends, coaching opportunities, training effectiveness and more
- ✓ Consolidation of results across multiple sites or business units that may be using different recording platforms
- ✓ Provide access to customer interactions to other stakeholders outside of the contact center
- ✓ and more!

NOTE: If you aren't ready to outsource your quality monitoring program, ask VereQuest about leveraging our proprietary SaaS tools for your internal QM team.



ROI – what to expect

Depending on your internal cost accounting methodology, you can typically outsource your QM to a third party including all the added-value benefits for a cost equal to what it costs to support an internal QM team. While you may realize cost savings due to efficiencies, if the cost is significantly less than your current internal costs, then we encourage you to take a look at how they pay their QM Team. As the adage goes “you get what you pay for”. This is particularly important if you are counting on the outsourced QM Team to provide your internal team with effective, actionable coaching.

Determine what you want your QM Partner to do

- ☐ Will the QM Specialist be accessing the interaction directly from your site or will you be batch uploading them?
- ☐ How long is the scorecard / list of criteria?
- ☐ Do you want the QM Specialist to choose a random variety of interactions (e.g. different types, different lengths, etc.) or a very specific type of interaction (that may require some additional effort to search/find)?
- ☐ Do you want the QM Specialist to categorize the root cause for the interaction? e.g. *"What prompted the customer to reach out?"* (Great for identifying opportunities for effort reduction and/or FCR.)
- ☐ What other data points would be valuable to capture (over and above agent performance)? e.g. *"Had the customer reached out before?" "Was the interaction related to a new policy?"*
- ☐ Do you want the QM Specialist to write up a quick summary of the interaction?
- ☐ (VereQuest Advantage) Do you want the QM Specialist to provide a customer experience review? e.g. *"From the customer's perspective, did the customer's experience reflect our brand promise?"*
- ☐ Do you want the QM Outsourcer to provide you with data analysis, monthly/quarterly reporting and/or recommendations, etc.?
- ☐ Does the QM Specialist need to access additional resources and/or systems to complete the evaluation?
- ☐ Do you require the QM Outsourcer to guarantee a specific turnaround time on evaluations?
- ☐ ... and more



Calculating the cost of an internal QM Specialist

The following is intended to be illustrative. Your costs may be higher or lower. Your productivity better or worse. For a detailed ROI related to your specific environment, contact VereQuest.

Item	Direct Monthly Costs	Description
QM Specialist Salary	\$4,000-\$5,000	Average in North America. Typically a former agent.
QM Specialist Overhead	30%	Include recruiting, initial/ongoing training, facilities, equipment, bonuses, benefits, corporate infrastructure, etc.
Management Support	\$650	1:10 ratio
TOTAL COST PER MONTH	\$6,150-\$7,450	
Paid Hours Available	150	
Productive Hours	60%	Time away from QM for training, meetings and (of course) chatting.
QM Hours Available	105	
Cost per QM Hour	\$58.57-\$70.95	





Calculating the QM time required

Most BPO organizations base their pricing on:

- How much time does it take to complete the task?
- What is the fully loaded hourly rate?

If you haven't conducted time studies in your own environment, here is one approach to estimating the amount of time that should be required to complete an evaluation (in minutes):

Preparation / Time to Access Call/Email/Chat	Length of Call / Time to Read Email or Chat	Avg. # of Times the Interaction is Reviewed Based on Complexity	Time to Gather the Data / Complete the Scorecard	Time to Craft Coaching Notes	Total Audit Time*
1	5	1.5	3	5	16.5

*Total Audit Time = $1 + (5 \times 1.5) + 3 + 5$

In the above example, 3-4 evaluations should be able to be completed **each hour**.

For outsourcing quality assurance, you will want to negotiate a **per evaluation rate** vs. an hourly rate. This will help you manage costs without having to oversee the third party QM team's productivity.



Other costs to consider when outsourcing

There may be other services that you will want to budget for over and above the evaluation itself. These are typically billed at an hourly rate and may include:

- ☐ Initial set-up of the Program and initial training of QM Specialists
- ☐ Replacement training of QM Specialists (VQ does not charge for this)
- ☐ Monthly reporting (VQ provides real-time, online reports at no charge)
- ☐ In-depth data analysis support (VQ provides annual review at no charge)
- ☐ Routine consultative support (VQ provides at no additional charge)
- ☐ Monthly calibration sessions (VQ does not charge for this)
- ☐ Online skills-based training
- ☐ Customer Experience consulting

Although all Outsourced QM providers will have different ways of approaching pricing, typically costs for outsourcing to a high quality, experienced firm in North America will come in at or slightly above what it would cost to handle QM internally --- plus you will gain all the added-value benefits outlined earlier in this guide. Remember that it all comes down to the fact that the people evaluating your agent's interactions must have the depth of experience to be able to provide insight and coaching needed to lift the overall experience.



Other financial benefits to consider in your ROI calculation

Most organizations are able to support outsourcing QM based on: (1) reduction/redeployment of full-time equivalent employees; (2) desire to have unbiased perspective; and (3) desire to leverage QM expertise and technology.

- ❑ Employee Costs – reduced hard/soft costs associated with conducting QM internally including salaries, overhead, management time, benefits, work throughput, etc.
- ❑ Agent Efficiency – improved handle time, first call resolution
- ❑ Customer Retention – renewal revenue, lifetime value
- ❑ New Customer Acquisition – improved sales conversion rates
- ❑ Customer Growth – improved cross-selling/up-selling → which in turn improves loyalty
- ❑ Customer Word of Mouth – improved referral effort, reduction in negative word of mouth/poor public relations
- ❑ Customer Loyalty – improved NPI or CSAT scores → which in turn drives revenue

There are many ways to calculate ROI and, therefore, it is important to pick those metrics that can be easily defended and supported through measurement.



Calculating ROI

When calculating the ROI of outsourced Quality Monitoring it is important to delve beyond the hard cost savings of lower staffing costs. The real ROI lies in calculating the link between an improved contact center experience and revenue.

This example focuses the assumption that, by outsourcing QM, frontline managers will have more time to coach their team. This will result in improved retention (particularly with upset customers) and a lift in Net Promoter results.

Item	Lower	Average	Higher
Cost for Outsourced QM 100 Agents x 4 Evaluations 4800 Evaluations /Year*	\$20.00 per evaluation \$96,000	\$22.00 per evaluation \$105,600	\$25.00 per evaluation \$120,000
# of Unique Customers	300,000	300,000	300,000
% Upset Customers / Detractors (VQ tracks this via the QM process)	5% 15,000	7.5% 22,500	10% 30,000
% Turned Around Given Improved Coaching Alone	10% 1,500	15% 3,375	20% 6,000
Lifetime Value / Retained Revenue Avg. Net Profit \$500/Customer	\$750,000	\$1,687,500	\$3,000,000
ROI Potential	\$654,000 681%	\$1,581,900 1498%	\$2,880,000 2400%

*This is an example only. Cost is highly variable, based on time required to complete an evaluation and annualized volume. Results are also based on the opportunity that exists within your customer base to improve NPS. If your NPS is strong, plan on incremental improvement over time. If your NPS is not where you want it to be, contact VereQuest now for a detailed estimate and demonstration!



Getting Started

Outsourcing your quality monitoring typically takes 4-6 weeks to get started. The majority of work effort revolves around:

- Gaining access to the interactions from a technology point-of-view (background checks, logins, etc.)
- Gaining agreement to the evaluation criteria, if you are making updates/revisions
- Communicating the change internally

Things to do before you launch

- ❑ Collaborate with your third party partner on the development of the evaluation criteria (scorecard) that collectively drives the right behavior and aligns with your corporate brand promise. Be very specific. Gather examples. Create a library of best practice calls, emails, chat.
- ❑ Determine all the data points you will want to capture with the evaluation for data analysis e.g. reason for the call, product/service, customer emotions, FCR definition for your business, etc.
- ❑ Evaluate a sample of interactions you have already evaluated internally against the new scorecard and using the third party QM team. This will provide you with a training opportunity, highlight areas of the scorecard that are unclear or require tweaking and provide you with an indication of the impact the new program will have on agent results.
- ❑ Determine when you are going to launch. Typically you will want to make the switch at the beginning of a reporting period (e.g. new quarter, new year).
- ❑ Allow for a 30-90 day pilot period – perhaps even run parallel with your current QM program – to measure the impact of the change on agent results and provide your frontline supervisors with the opportunity to get used to the new scorecard (if changes have been made), new technology (if you are leveraging the outsourcer platform) and new expectations.
- ❑ Determine how the third party will access your calls, emails and chat interactions e.g. via secure link/VPN or batch upload. Conduct required background checks.
- ❑ If you are leveraging the QM technology platform of the outsourcers (see Added-Value Technology), conduct a security scan to ensure data security.
- ❑ Determine how you will handle 'disputes' – the ability for an agent or supervisor to request a review of results.
- ❑ And most importantly, introduce the program to your Team in a positive and transparent manner. (More on this later).



The Scorecard

One of the most time-consuming parts of launching a QM program in general is developing the criteria by which interactions will be evaluated. If you have chosen an experienced QM Partner, they should be able to provide you with a good starting point and/or make a recommendation about enhancements to your existing scorecard leveraging best practices.

The key to a well designed scorecard is that it is 'realistic'. For example, if your business is largely transactional and average handle time is a key driver of your business model, then you will want to be discerning about the level of engagement you expect agents to have with customers.

Often times what we ask of agents conflicts with other measures of success (e.g. AHT target often conflicts with sales conversion. Building rapport often conflicts with ATT.) It is important to understand that customers do not expect to be "WOWed!" with every interaction. Your customers may value efficiency over engagement or empathy over efficiency.

At the end of the day, when agents adhere 100% to your scorecard, you should see a reflection of not only the kind of customer experience you want to deliver but also of your corporate brand.

KEY! The more detailed and specific you can be in defining your scorecard criteria the better. Share this information with your training department to make sure that agents are prepared to deliver on your expectations. Work with your QM Partner to make sure that you have a common understanding of what each standard sounds like/looks like. Document exceptions and rules along with steps to be followed and mandatory statements.

Keep this document updated and track your changes and revisions so you will be able to understand any changes in results over time.



Determine who will have access

1. One of the many benefits of leveraging a QM partner's technology is the ability to house a copy of the call recording, email or chat session directly on the site. Then, when you are reviewing the evaluation results, the interaction is conveniently attached – no need to go hunting for it on another site.
2. Another benefit of this type of set-up is the fact that you can now make these evaluations and the interaction available to others outside of the contact center. Make sure you negotiate this into the contract. NOTE: VereQuest licenses provides an unlimited number of users.

CAUTION: If you are housing actual customer interactions on a QM partner's site, make sure they have all the required data security measures in place.





Should agents have direct access?

We are often asked whether or not it is a good idea to give agents direct access to their own results -- and the short answer is "it depends". Here are some best practices related to sharing results with agents:

- While emails and chat sessions are much more straightforward, allow agents the access and scheduled time to listen to their own calls so they can hear first hand (a) how well they are doing and (b) areas where they feel they can improve.
- Agents should only be given access to their own interactions ... and a selection of best-in-class calls, emails and chat sessions.
- Tenured and high performing agents are given access to their own evaluations as they are completed. Even though these agents may not require regular coaching, it is still very important to keep checking-in with these agents to provide encouragement.
- New agents and agents on performance improvement programs are not given access to their own evaluations without a coach/manager to discuss, review and determine next steps. For these individuals it is important they be given direction re how to interpret results, which areas to focus on and coaching to refine their personal skills, knowledge, etc.



Communicating with Stakeholders

As with anything involving change, how you communicate it to the various stakeholders in your organization will have a direct impact on whether or not they embrace the change. This is particularly true of agents and their direct supervisors. Here's some advice:

- ❑ Be sure to identify and engage stakeholders early in the process – particularly the contact center frontline management team. Given your unique circumstances, be as transparent as possible.
- ❑ If individuals are going to be moved to another area as a result of this change, plan to discuss this in advance and be sure to position it in a positive light.
- ❑ Plan to 'pilot' the initiative for a period of time to gauge the impact this change will have on performance metrics.
- ❑ If QM scores are tied to performance bonuses or evaluations, be sure to schedule the launch at a time that makes sense e.g. at the beginning of the new reporting period.
- ❑ Be clear and transparent about how agents will be evaluated. Make sure that everyone, particularly the agents, understand and have the ability to demonstrate the standards you are setting. Don't plan to launch a totally new set of evaluation criteria if you haven't got the resources to train and coach agents on the new criteria.
- ❑ Think about the best way to communicate the change. If you have the opportunity for a 'town hall' meeting, that is a great way to introduce it and then follow-up with more detail via email, social media, etc. Provide the ability and process for individuals to ask questions and be prepared to answer them promptly.



After You Launch – What Comes Next?

Outsourcing your QM doesn't mean you can forget about it! Success will depend on how engaged you remain in the process. There are some key communication points to put into place:

- ✓ Escalations (very poor interactions that require your immediate attention)
- ✓ Kudos (really great interactions that need to be recognized quickly)
- ✓ Monthly calibration sessions

Some Outsourced Partners, like VereQuest, also report key trends that you will want to know about just-in-time.

The First 30 Days

The Importance of Calibration - Even though you are outsourcing the bulk of work related to QM, it is still important that you calibrate regularly with the QM Partner.

“Calibration” involves testing that every QM Specialist is evaluating interactions the same (correct) way. Without standardization you will not be able to trust your QM results and the agents/managers receiving their results will not accept them. Calibration is always important but more so at the beginning of a new relationship when your QM Partner’s team and your team are seeing results for the first time.

Fine-tuning your Scorecard – There will always be an adjustment period where you will need to scrutinize how everyone (your QM Partner’s team and your team) is interpreting the criteria in your Scorecard. At this point documenting, in detail, the description of each standard and what it sounds/looks like will be key.

Typically calibration, along with fine-tuning your scorecard, will happen (at a minimum) of weekly over the initial 30 days.



60-90 Days

Evaluation Criteria Review – Now that you have some data to work with, do some analysis. If you are capturing a Customer Experience evaluation as well, compare the results.

If agents are scoring well using the criteria you have established but the customer's experience is poor, then perhaps there is a disconnect. Are you asking your agents to do the right things that will translate into a great customer experience?

Are results unusually high for specific types of interactions? Perhaps your QM Partner does not fully understand policies or procedures around that type of interaction?

The first 60-90 days is the time to 'tweak' and make adjustments and/or changes to agent expectations. With this in mind, some organization use the first 30-60 days as a 'pilot' period which allows agents to get used to the new criteria, frontline managers to become more comfortable with their coaching role and management to be able to change their minds about the kind of experience they want to deliver.

1 Year

Annual Review – Customer expectations change over time. Now is the time to review your scorecard and your expectations to make sure they are aligning with what you understand your customers expect of your contact center and your brand.





What's different about VereQuest?

We can't comment about what other companies doing Outsourced QM do, but here are the top 5 things our customers tell us is different about what we do for them:

1. We don't use call center people to do the evaluations. We use individuals with years of experience roleplaying in a corporate setting. They have the skills and experience to effectively 'listen' from the customer's perspective.
2. We understand the markets and industries that we work in. This is key to providing added-value insight into what drives customer behavior and how to influence improved customer satisfaction results.
3. We capture data related to both agent behavior AND the customer's experience. To make sure that we offer an accurate view, we calibrate ourselves against our client's survey results. Our customer experience measures and observations have been proven to be a very accurate representation of how customers feel.
4. We provide actionable, detailed written coaching that frontline management can readily leverage and agents find both objective and valuable.
5. Our technology is very user-friendly and facilitates a free flow of information and insight in real-time. It enables our customers to consolidate findings across channels and expand the contact center experience and insight to other key stakeholders within the organization. And perhaps most important, we take your customer/company data very seriously and follow industry best practices when it comes to safeguarding it.



What some of our customers say about VereQuest Quality Monitoring

"We were pleasantly surprised at how quickly VereQuest was able to get up and running - both in terms of understanding our business and goals as well as customizing the system to meet our specific requirements. The system is so flexible and easy to use that we can adjust our program in real-time as we learn and our expectations evolve. Most importantly, by monitoring a sizable sample of calls and emails, VereQuest enables my management team to identify and then act on those key issues that stand in the way of delivering the kind of customer experience our company and customers expect. The online, real-time reporting lets us know what's happening day-to-day and the escalation of 'problem' calls or emails has proven to be extremely helpful for immediate coaching and management intervention. There is no question that VereQuest's customer experience monitoring program has contributed to our ability to achieve best-in-class customer service for our customers."

"I must say, since inception the VQ team has made me think differently about the Customer Experience...in a GREAT WAY! The insight that VereQuest offers on any and all questions is absolutely AMAZING!! If a Masters Degree could be given in Customer Experience, I say that VereQuest should possess one. Your team is so open to providing feedback and insight in an eloquent and clear manner, it allows us to connect better with our managers/coaches and ultimately our customers...THANK YOU!!"

"if you ask our SVP or Shared Services VP, they will say without hesitation that while there are a lot of factors that contribute to our customer experience results, we could not have achieved this without our VereQuest partners. It is a real collaboration."

"Our Contact Center Managers often comment on how effective they find the tool and how the results of the audits have supported their coaching efforts and fine tuned the areas to help their team with. From a results standpoint, the center's customer experience score and overall consistency in the behaviors have improved immensely since the launch of VQ."

"Over the years we have found VereQuest to be both responsive and pragmatic in helping us lift our performance to meet the changing needs of our clients. We value their independent, external perspective and feel that their insight has been vital to shaping the experience we deliver to our broad base of clients. From call and email monitoring through to providing coaching and training to our front line leaders, VereQuest goes above and beyond to deliver insight that is both accurate and meaningful. We particularly appreciate the quality of the VereQuest team both in terms of their expertise and approach. They bring a deep understanding of customer behavior and a solid coaching mentality. They are able to frame and present opportunities for improvement in a way that both enlightens and inspires our staff, and many of our front line leaders look forward to the calibration sessions with VQ coaches. I can honestly say that the VQ team feels like an extension of our own internal team and I would not hesitate to recommend VereQuest to you and your company."

Free, No Obligation Trial

If you are sold on the idea of outsourcing your Quality Monitoring or just intrigued by the possibilities, contact us for a no-obligation demonstration and 'trial run' of how VereQuest can help you lift results and deliver more value for your QM efforts.

We'll review a few sample calls/emails/chats and provide you with sample assessments and a detailed estimate. Get in touch today and let's talk!

Established in 2002, VereQuest provides organizations with a wide range of customer experience services including a robust contact center quality monitoring offering. Working with businesses throughout North America, VereQuest provides a unique perspective on a complex, ever-changing customer environment.

Helping companies keep the promises they make®



www.verequst.com

info@verequst.com

1 866 920 2011 x222

Copyright

Any and all concepts, ideas and suggestions in connection with this presentation are intellectual property of VereQuest Inc. and protected by copyright. They may only be transferred, used or utilized in any form whatsoever by separate agreement. Should such use or utilization nonetheless occur a right to rendering of accounts and to demand equitable remuneration and handing over of proceeds is deemed agreed upon.

Any action constituting use or utilization is deemed as implied acceptance of this agreement and will entitle VereQuest Inc. to claim injunction, removal of the unlawful condition, publication of a judgment, equitable remuneration, damages, handing over of proceeds as well as rendering of accounts.

Any and all disputes arising from such copyright infringement shall be governed by Canadian law, with the exclusion of the conflict of law rules, and applicable international agreements. VereQuest Inc. shall be entitled to bring any claim in connection with this agreement, including claims resulting from copyright infringement before the court having subject-matter jurisdiction competent for Province of Ontario, CANADA.