



Technology Optimization Part 5: Quality Monitoring

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The National Association of Call Centers | Volume 4, Issue 11, May 29, 2009

Try this analogy: Compare quality monitoring in your center to differing approaches to health management. One model awaits the presence of symptoms before bringing specialists into action to treat the disease. The other promotes health proactively for the whole body as a means to ward off problems. I'm all for the latter when it comes to maintaining my own health, and the health of a contact center. If you agree, you'll see quality assurance (QA) is just what the doctor ordered. A good process with appropriate resources for execution is essential, but technology is the enabler that gets the job done right.

Quality Monitoring (QM) tools help centers meet performance objectives, ensure consistent contact handling and process adherence, and optimize operations. Solutions are available to serve all sizes, levels of sophistication, and business goals. The spotlight tends to shine on products with full-fledged multimedia capabilities integrated in a suite with other performance tools, such as speech analytics, eLearning, and workforce management. Yet there are plenty of affordable options for resource-constrained operations, including low-cost desktop recording devices. Whatever option fits your budget, QM is more than a personal coaching tool for individual representatives. It's also a means to judge and optimize the performance of the "whole body."

To their credit, most centers use QM tools in some form or fashion. As powerful as these tools can be, I've seen common themes that challenge their effectiveness:

- QM program designers do not align scorecard elements with business goals and key performance indicators. They don't customize metrics to account for call types and channel differences.
- The QM tool only captures the audio portion of the call, rendering the reviewer blind to how the representative navigated the applications. Chat and email interactions are ignored altogether.
- Centers don't establish – or stick to – sampling targets for recording and review (e.g., 5-10 calls per rep per month).
- Service representatives don't receive feedback and coaching in a timely manner.
- Scores are tabulated manually using our old friend, Excel. The "reports" don't capture trends nor provide thoughtful analysis of what the scores, individual coaching sessions, and trends reveal about the "big picture." They don't suggest initiatives that could optimize the center's performance.
- Centers don't commit the resources to do the job. It's the first thing to go when resources are tight.

Poor design, uneven execution, and questionable reporting cause folks at all levels to distrust the process as subjective and of marginal value. If you're game to champion a wellness campaign, here are some proven remedies to optimize QM technology and its application in the center, ensuring objective use of data for individuals and the organization:

1. Create well-defined processes end-to-end and execute them consistently. Include scoring, calibration, reporting, trending, and feeding QM data into scorecards in these processes. Provide individual feedback in coaching sessions with specific actions for improvement. Use representative "best practices" calls to reinforce training principles and recognize excellence in service.



2. Extend your vision beyond individual scoring and feedback. Think of QM as a key mechanism for promoting operational efficiency and competitive differentiation. Use your results to identify organization-wide improvements, such as training additions/changes, system enhancements (e.g., user interface, screen layout), and process improvements. That's where the big bang for your QM buck lies.
3. Take a holistic view of quality assurance. Capture voice and data and monitor all forms of contact. Screen capture shows how your reps use your systems and what they're really doing when they put people on hold. The growth in use of other media suggests a need to include them in the QA process.
4. Integrate QM scoring with other performance tools. Use your workforce management system to decide when to score calls and when to provide feedback. Leverage eLearning to trigger action based on QA scores. Link your QA assessments with your customer satisfaction surveys to bring an external perspective to balance with your internal views. And when you're ready to take the next step, build in speech analytics capability to add further value to your recordings and depth to the learning you glean from them.