

Today's Tools Take QA to the Next Level

QM, VOC and analytics offer expanded insights for driving the right actions to deliver a quality service experience.

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Everybody wants to provide quality customer interactions. The good news: The technology to enable basic quality assessment is affordable with viable options for centers of all sizes. As a result, most centers do some form of quality monitoring on their primary mode of contact, phone calls. The bad news: Scoring individual calls is not nearly enough.

It's time to establish a more robust and (dare we say) holistic view of the customer experience. Fortunately, there's more good news: The tools, vendors and overall marketplace have evolved to address all media and perspectives (i.e., internal and external) and surface valuable insights that can transform the customer experience. It's time to put the people, processes and technology in place to gather these pearls of wisdom... and then do something with them!

The Quality Continuum

Unless you've got really deep pockets and unlimited resources from which to draw, you won't be able to achieve performance management nirvana in the blink of an eye. But if you have a road map and the patience and determination to follow it, you can steadily progress from that basic quality starting point along a continuum to insightful, balanced multimedia optimization. Figure 1 provides a guidepost for your journey.

SINGLE VIEW (INTERNAL), CALLS ONLY

Most centers start at the far left, where quality monitoring and the associated rating system provide an internal assessment of voice connections. The supporting technology has been around for a long time, and a decent system will offer flexible scorecards, calibration and trending at a reasonable price. VoIP offers additional options for capturing calls, and many vendors bundle QM with their other offerings. Beyond their value in assessments, call recordings can be used to support corporate liability and compliance initiatives, or play a role in employee training and coaching. The bottom line: This launching point for a quality program comes from a base of mature technology that every center needs and should be able to put in place and leverage.

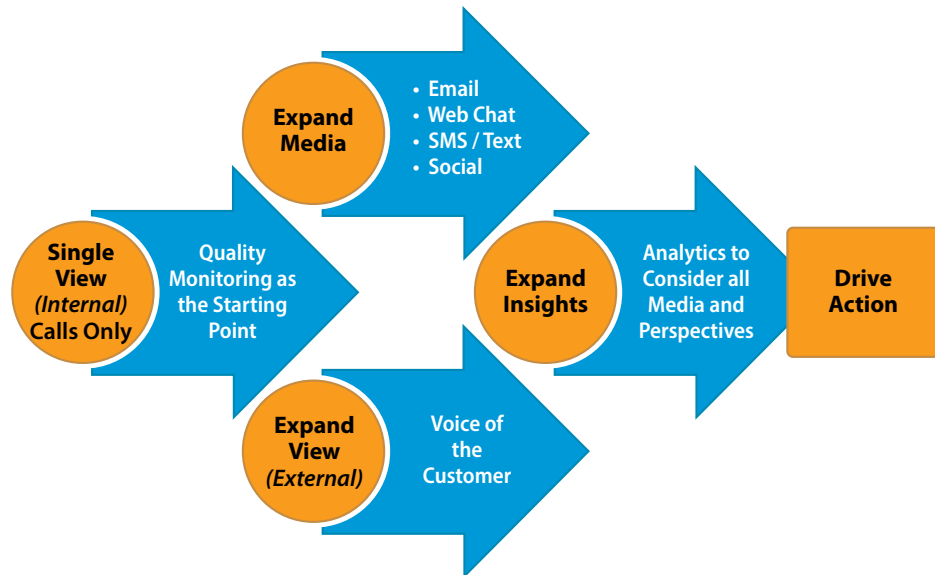
EXPAND MEDIA

Savvy centers extend their existing QM programs to cover other media. Text-based contacts—e.g., email, SMS/text, web chat—are obvious candidates as systems used for those channels typically have the ability to capture and store interactions. Core QM tools can be used for review, scoring, calibrating, reporting, etc., and offer scorecard options by media. As the balance of contacts across media changes, the need to extend the QM program becomes clear.

EXPAND VIEW (EXTERNAL)

A rigorous internal view of performance is all well and good, but if customers don't share your sensibilities, you won't hit the mark. You need to capture the opinions and experience of the customer through "Voice of the Customer" (VOC), ideally across all media—calls, emails, text/SMS, chat and self-service (IVR, web). Short, post-interaction surveys using IVR, email and web-based solutions can establish a direct connection between the customer feedback and the specific contact and agent. Core contact center technology vendors and performance suite vendors provide premise-based applications. Hosted solution providers offer a range of simple, inexpensive offerings. And managed services puts both the technology and the assessment of VOC input in the hands of companies staffed with experts. Our view

Quality Evolution,
Figure 1, right



is there is no longer any excuse not to pursue VOC with so many technology and sourcing options.

It's worth noting that VOC is NOT the same as the annual or semiannual marketing survey. The latter generally focuses on the corporate brand, broad-based opinions on products and services, and willingness to recommend the company's offerings to others through feedback such as Net Promoter Score. Such surveys deliver valuable insights, but they aren't stand-ins for VOC feedback *tied to specific customer contacts*. The center needs agent- and interaction-specific input to support continuous improvement of the customer experience. And timing is of the essence: the sooner the survey is offered, the more useful the customer feedback.

EXPAND INSIGHTS

Once measurement systems are in place to address the different media and both internal and external perspectives, it's worth taking a step back to consider what more these resources might convey when taken together or when explored and analyzed more deeply. Some analytics solutions process information gathered through QM, VOC, and other repositories (e.g., CRM, social media) to garner additional insights and define action. For example, a combined dashboard might show VOC ratings to be low but QM scores high. Such an outcome would prompt analysts and management to determine whether agents were following guidelines or training and "complying" but in fact there need to be changes to processes, scripts, or other interaction elements that might be frustrating customers. Or perhaps the internal scoring system is out of alignment with what creates an externally satisfying experience.

There are also analytics solutions focused on particular media interactions that can bring additional quality and customer experience insights. These solutions use the wealth of infor-

mation captured in contacts to go beyond what QM and VOC, even when combined with other data, can reveal. Speech analytics supports sophisticated call categorization, analysis, trending, reporting, and mining capabilities for companies that have the budget, appetite, and business imperative to pursue it. Text-based analytics offerings can similarly bring a level of automation to the assessment process for email, SMS/text, or web chat. The technology starts with the capture or recording of the interactions, which may already be done to support QM. The analytics function then provides the ability to explore what has been conveyed on specific interactions or collectively to draw out more insights. These tools can also be used to target specific contacts to explore further in the quality process based on particular words or phrases.

Tool sets for expanded insights used to be associated with costly implementations and heavy demands for support resources. Slimmed-down versions have enabled more centers to avail themselves of these insights and effect meaningful change in their organizations—as long as they are willing to commit some trained staff to the task. Managed service offerings, such as those from Customer Relationship Metrics, provide access to analytics capabilities and the insights they offer without bringing the technology in-house or requiring staff with the specialized training to use the tools.

Quality and Self Service

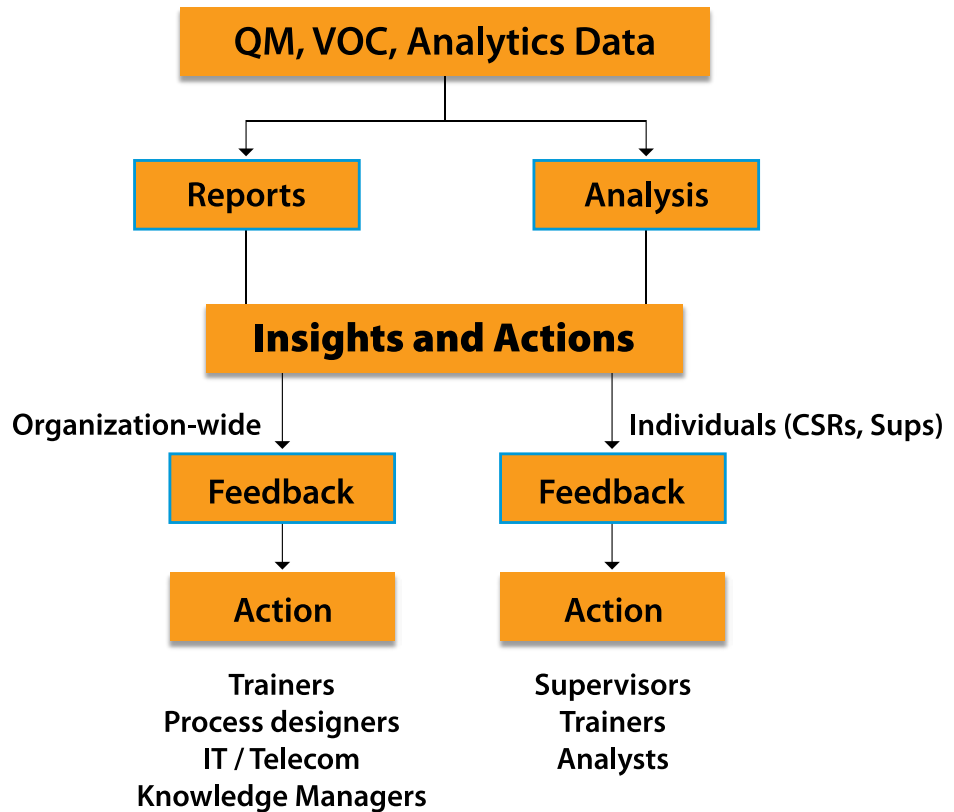
Another set of channels to consider for quality are the self service channels, where it is rare to see centers conducting QM or capturing VOC. Once the applications pass their respective usability and functional tests, the center simply monitors usage statistics and raises concerns when outliers are noted—e.g., excessive “opt outs” to agents. And yet the customer experience with self-service impacts their overall impression of the company. A QM or VOC process may have a role to play.

While IVR usage may be waning for self-service, some companies have specific requirements to bolster the effectiveness of this channel. Some retain IVR experts such as EIG to leverage their proprietary tools and special expertise to identify weakness in user interface design. Others use the equivalent of “side-by-side monitoring” or the call observation function to listen in while customers interact with the IVR. It is easier to conduct this eavesdrop-

The QM/VOC/Analytics Evolution Offers Many Options, Table 1, below

Characteristic	Options with Today's Technology
Interaction Media that QM and VOC can address	Broad media support—calls, email, web chat, IVR self-service, web self-service, mobile, text/SMS, social media
Media for VOC data capture	IVR, email, web, mobile applications, social media
User interface	Web-based for easy administration (end user managed)
Sourcing options	Premise, hosted, or managed services
Vendor options for QM	Performance suite vendors, contact center solution vendors, specialty QM vendors, service providers
Vendor options for VOC	IVR vendors, performance suite vendors, specialty VOC vendors, service providers
Vendor options for Analytics	Performance suite vendors, contact center solution vendors, specialty Analytics vendors, service providers

QM and VoC Insights Drive Action, Figure 2, right



ping with speech-based interfaces, but even companies using touch tone can glean some sense of the customer perspective by listening in on IVR interactions: users may express their frustration to a sympathetic family member nearby, or even by talking to (yelling at?) the system itself! And, of course, focus groups can provide “voice of the customer” input when the company contemplates changes or additions to the IVR user interfaces.

A few centers have started to offer instant web surveys in the wake a self-service transaction. They probe for the customer’s experience with the application, success in completing a transaction, and level of effort. Suggestions for improvement are welcome. Foresee, WebTrends, and others provide the technology and methodology to complete a web self-service assessment.

If you choose not to institute a formal QA or VOC process with self service, make sure you can capture and track key indicators of success including: Opt Outs (or Bounce Rate), Total Users, Return Users, Completed Transactions, Access Frequency, Last Use Date, etc. Self-service success drives greater usage, which in turn relieves pressure on your direct and assisted service channels. And success makes customers happy, too.

Strategy Drives Tools, Tools Drive Action

Expanding media. Expanding views. Expanding insights. When all the tools were narrowly construed, complex, and expensive, it was easy to confine one’s quality initiative to voice

calls alone. But now there are several broad-based, affordable tools that can be implemented readily in centers of all sizes. And third-party service providers can supply the subject-matter experts to analyze and interpret the data. The more tools and insights, the more opportunities to improve the customer experience. But you need a strategy to chart your course and a management team that commits to taking action on the information and insights you surface.

Your customers' current and projected use of various channels and media will determine the breadth of coverage for your quality initiatives. Assessment tools should be consistent with the nature of transactions and media covered. Surveys should be sensitive to the customers' Level Of Effort (LOE), preferred medium, and propensity for supplying feedback. Provide opportunities for qualitative feedback for those inclined to give it.


LOE matters to the organization as well. Some technologies are easier and less expensive to implement and manage than others—e.g., a SurveyMonkey questionnaire in lieu of an integrated, web-based QA offering. And some applications can be “rented” on a short term basis to spot-check potential issues and/or validate long term utility.

As you line up your quality assessment tools, make sure that the individual components integrate with one another, or look for a suite of tools or services. Ideally, you'll want to consolidate data on all facets of quality into a single platform for analysis and reporting. Beyond the obvious savings in toil and trouble, you'll provide timely information access to your constituents. In so doing, you'll promote accountability and encourage improvement in contact handling at both the individual and organizational levels. See Figure 2.

At the level of individual service representatives, timely feedback and coaching are cornerstones of effective professional development. Analysts can assess trends across a broad spectrum of front line workers to identify opportunities for group training or changes in the core training curriculum. Analysts, trainers and supervisors may work together to develop, deliver, and schedule eLearning modules to bolster a representative's knowledge and/or skills.

At the organizational level, trainers, process designers, application designers, and other technologists can look for systemic improvements that could elevate performance across the entire center. For example, analysis may reveal process improvement opportunities to eliminate steps, or ways to use technology to reduce the burden on agents and customers.

Take the Next Step

Technology has given companies a whole range of ways in which they can interact with their customers and prospects. Ready or not, most have leapt into the fray to support all of the communications channels that their constituents habitually use. And now they need to expand views and insights to deliver on the vision of “quality” service, regardless of media. QA and VOC technologies are available to help companies assess their effectiveness in each channel and drive action to elevate performance. At the end of the day, the “customer experience” isn't a voice-only proposition; it's a multimedia phenomenon, and one in which the customer's view is at least as important as the company's view. With the right tools, a center can garner the insights to drive the right actions to deliver on the quality promise. 

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What About Social Media for Quality and VOC?

Social media continues to create some fanfare at industry events and in various publications, but contact center practitioners seem to be migrating toward a pragmatic perspective of this channel's value for service-related interactions. However, social media can serve as a forum for listening to the Voice of the Customer. Most vendors offering contact routing and/or performance management tools also tie into social media today. They use tools like Buzzient and Radian6 (SalesForce.com) to scour public websites, social networks, blogs and forums to surface posts that mention selected names, words, and phrases. From a quality and VOC perspective, the contact center can take note of issues that draw a high incidence of "vocalization" in the social sphere and see if similar complaints surface in other channels such as good old calls and email. This process allows key service themes to rise above the noise of social media, bring some practical reality and value to the information shared there, and highlight the need for targeted action in the center.

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