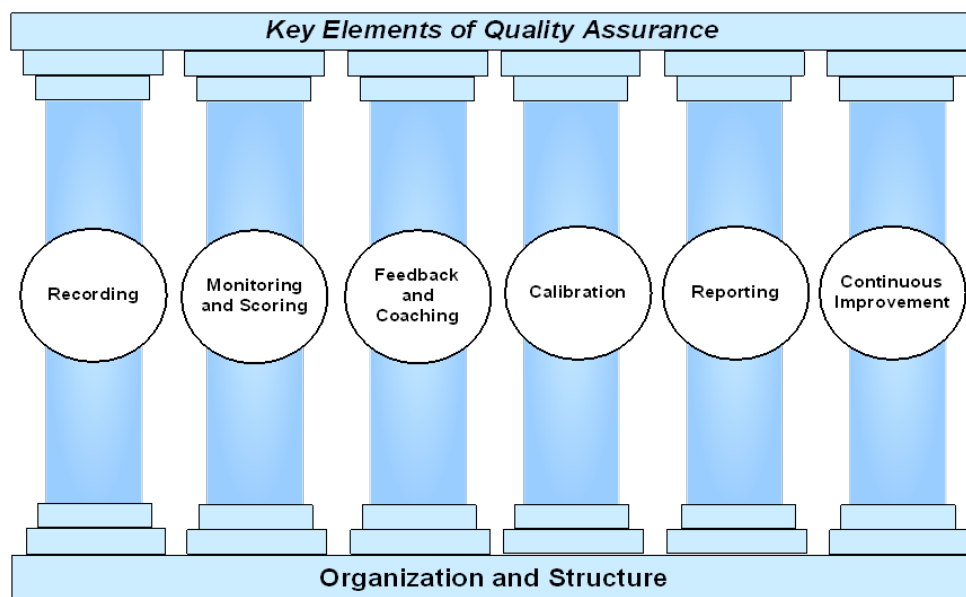


## Contact Center Quality Monitoring “Best Practices”

Quality Monitoring (QM) helps centers meet performance objectives, ensure consistent contact handling and process adherence, and optimize operations. While each center’s context, goals, opportunities, and constraints shape the quality assurance requirements, the following practices help realize the greatest value from the program.

### **Strategy: The quality monitoring program supports the center’s role in achieving business goals**

- Quality assurance criteria align with strategic business drivers
  - Management communicates the customer service characteristics that the company seeks
  - The quality program establishes meaningful, realistic performance expectations
- Management applies the quality monitoring program consistently to ensure that the center delivers the target customer experience
  - The organization invests in technology tools and quality assurance staffing appropriate to its size, complexity, business requirements, and culture
  - Quality monitoring processes address the six key elements of quality assurance:



- The organization aligns its internal quality assessments with customer satisfaction surveys (a.k.a. “Voice of the Customer” or “VoC”)

### **Recording: Voice and screen capture enable QM analysts and/or supervisors to assess each scored contact carefully and present findings with the original source material**

- Business rules drive recording rates consistent with the center’s requirements for compliance (100%, if applicable), quality assurance, training, and agent coaching and development
  - Recordings capture data about each contact – e.g., agent ID, contact type, call length, number dialed, customer data, etc. – to facilitate contact selection, retrieval, and reporting



- Business rules drive automatic deletion of recorded contacts consistent with corporate data retention policies and coaching/training requirements
  - The center retains voice and screen recordings that model excellence in soft skills, agent expertise, use of system tools and resources, collaboration/escalation (when needed), and correct process flow for training and coaching

### ***Monitoring and Scoring: Customer interaction standards and agent development requirements drive quality monitoring and scoring tools and processes***

- Scoring templates structure the evaluation process and focus attention on the most important skills
  - Skills may be categorized in groups and/or accorded different weightings
  - Templates do not assess the same skill multiple times (a.k.a., “double dinging”)
  - Scoring templates align appropriately with customer satisfaction (VoC) survey(s)
- All front line personnel (agents, supervisors, management) understand the scoring criteria and tools
- The monitoring sample for each agent is statistically relevant (e.g., 5-10 monitored/scored recordings per agent per month) and proportional to the performance improvement needs
- Routine (e.g., annual) review of the scoring template identifies updates based on changes to center strategy and/or VoC feedback

### ***Feedback and Coaching: Agents receive meaningful and timely input on their performance***

- Management and QA staff receive formal training and periodic refresher courses on how to deliver QM results and provide effective coaching
- Agents receive clear and concise feedback within 1-3 days of scoring, preferably face-to face
  - Feedback links to recording(s) with supporting examples and guides
  - Acknowledgement of the agent’s exemplary behaviors builds confidence in his or her ability to improve
  - Documented performance plans set targets and timeframes for skill development
- Front line and support staff schedule and track the requisite follow-up activities – e.g., training (eLearning), practice sessions, increased QA monitoring/scoring

### ***Calibration: Scoring practices and procedures provide consistent, equitable treatment for all agents***

- Periodic calibration sessions and exercises resolve differences in scoring assumptions and judgments
- The center divides scoring responsibilities across two or more resources to minimize scoring bias

### ***Reporting: System tools provide visibility into performance for the individual, group, and center***

- Front line staff access quality monitoring results appropriate to their levels of responsibility based on login ID
- The QM tool distributes reports daily, weekly, and monthly automatically based on business rules
- Scorecards and dashboards incorporate relevant QM metrics to provide a holistic assessment of performance
- Reporting informs a formal process of review and trending with defined thresholds that trigger actions for out-of-threshold scores



***Continuous improvement: Information gained through the quality process leads to center-wide improvement***

- Management reviews QM results and trends no less frequently than monthly to identify opportunities for center-wide improvement
- Management collaborates with IT, training, and business process analysts to design and implement changes to systems, curricula, and operations to increase contact center efficiency and improve quality