Call Center Quality Monitoring

Best Practices for Improving Its Impact on Customer Service

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Call Quality Monitoring

SQM Group's research shows that 95% of call centers use call monitoring and coaching to improve customer service. Yet, very few call center managers can say they improved their Customer Satisfaction (Csat) due to their call monitoring practices. Furthermore, our research shows that only 17% of agents believe their call center quality monitoring efforts positively impact Csat.

Yet, most call centers use call quality monitoring to try to help improve their Csat and agent performance. To achieve their call center customer service goals to improve their Csat and agent performance, they randomly assess calls to determine a Quality Assurance (QA) score performance and identify strengths and weaknesses to address.
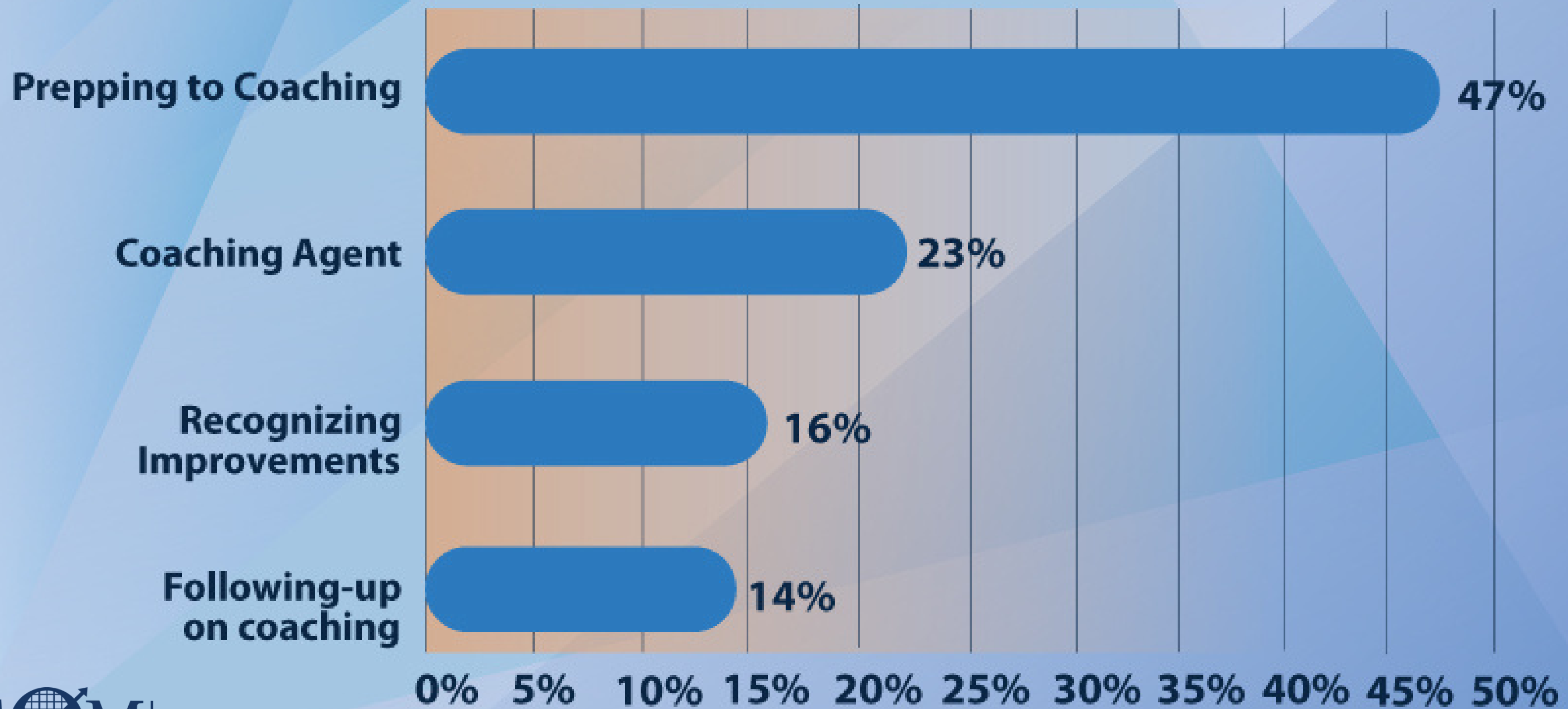
The below data shows our research on supervisor coaching activities. The findings show that 47% of the supervisor coaching time is for prepping to coach agents, and only 23% is for coaching an agent. It is common for supervisors to spend 2X or more time preparing than coaching agents.

Recognizing improvement and follow-up on coaching also have lower supervisor coaching time percentages. The lower time allocation for recognition and follow-up could negatively impact agent engagement and Csat improvement. Many QA evaluators and managers believe there is an opportunity to reduce prepping time and invest more time in other areas (e.g., coaching, follow-up, and recognition).
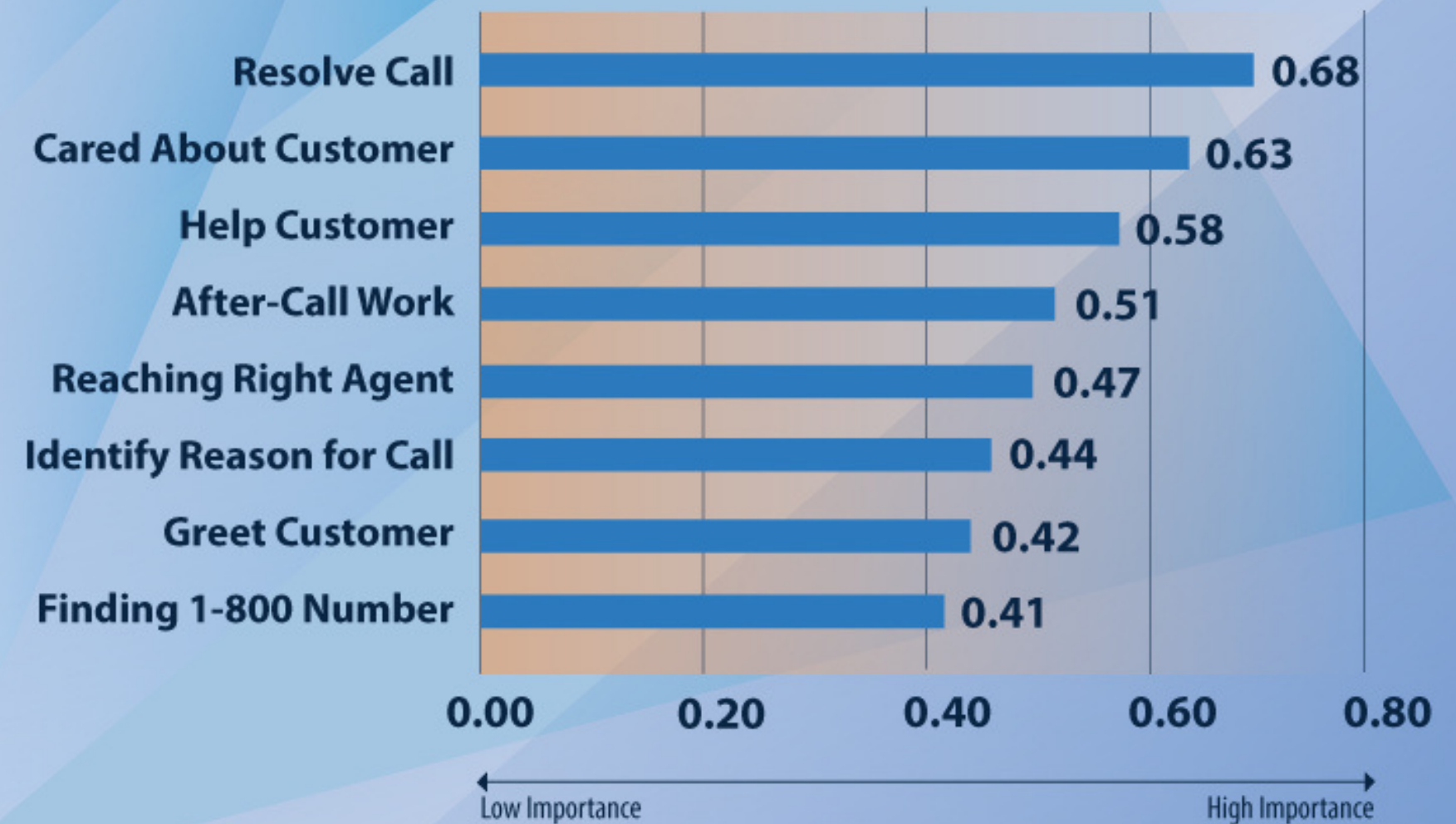
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SUPERVISOR COACHING ACTIVITIES

Activity	Percentage
Prepping to Coaching	47%
Coaching Agent	23%
Recognizing Improvements	16%
Following-up on coaching	14%

0% 5% 10% 15% 20% 25% 30% 35% 40% 45% 50%

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CALL CENTER CUSTOMER SERVICE MOT IMPORTANCE RANKING

MoT	Importance
Resolve Call	0.68
Cared About Customer	0.63
Help Customer	0.58
After-Call Work	0.51
Reaching Right Agent	0.47
Identify Reason for Call	0.44
Greet Customer	0.42
Finding 1-800 Number	0.41

0.00   0.20   0.40   0.60   0.80

← Low Importance   High Importance →

Furthermore, call center quality monitoring is more than just recording and evaluating random calls. To be effective at call monitoring, you want to evaluate the efficiency and effectiveness of customer service for delivering high Csat. Therefore, it's helpful to measure critical moments of truth (MoT) to understand customer satisfaction with the customer service provided.

From a customer's perspective, the MoT that matters the most is call resolution (preferably on the first call), caring about the customer, helping the customer, and after-call work. Generally speaking, MoT with a statistical correlation of .50 or higher is the MoT that matters the most to the customers.
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In addition, SQM Group's call center customer service research shows:

- *93% of customers expect their call to be resolved on the first call*
- *30% of calls are not resolved on the first call, and 12% of calls go unresolved*
- *46% of customers whose call was not resolved felt the agent could have done more to resolve their call*
- *13% of customers calling a call center describe their call as a complaint, and only 41% of complaint callers are very satisfied with how it was handled*
- *Only 53% of customers would describe their call center CX as great*

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Best Practices For Improving Call Quality Monitoring

SQM believes that traditional call quality monitoring has helped call centers achieve their call compliance goals more than delivering excellent customer service. Therefore, we thought it would be helpful to share call center quality monitoring best practices for improving and providing excellent customer service. So let's get started with the five call quality monitoring best practices for enhancing its impact on customer service.

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BEST PRACTICES FOR IMPROVING CALL QUALITY MONITORING

1 Determine the Right Team

2 Establish Call Quality Standards, KPIs & Scorecard

3 Implement Call Quality Monitoring Software

4 Analyzing QA Scorecard Results

5 Providing Agent Coaching and Training

1. Determine the Right Team

The starting point for call quality monitoring is to determine the right QA team. The QA management team should be comprised of some of the best-performing managers for customer service in the call center. Furthermore, a decision will need to be made to determine if QA evaluators will be in-house employees or use an outsourcer. You can make a strong argument with either approach.

The primary benefit of using existing in-house call center agents is it provides them with a viable career path for the right agents, and they have a good understanding of current QA practices, so it speeds up the training time. The downside is existed agents might have biases that could be perceived as counterproductive for evaluating calls accurately and fairly.

On the other hand, using an outsourcer that specializes or has the capabilities to conduct call quality monitoring can be an effective and efficient way of evaluating calls. For example, 3rd party QA evaluators can be unbiased in assessing agents' calls. The downside is the outsourcer QA evaluator approach requires more training than in-house QA evaluators.

The QA team needs to establish the call quality monitoring process and understand the call quality standards for evaluating calls and the ability to recommend and implement new standards, KPIs, and agent scorecards to make QA more effective and efficient.

2. Establish Call Quality Standards, KPIs, & Scorecard

Establishing standards, KPIs, and the scorecard is how a call center QA team will assess call quality. The standards, KPIs, and scorecard should be aligned with the company's strategic business goals. For example, at SQM, we highly recommend for the QA evaluation that customers assess their experience for KPIs such as call resolution, satisfaction with the agent, and whether it was a positive CX. The customer assessment can be done by conducting post-call surveys. In addition, the CX KPIs should have higher weighting for importance than call compliance KPIs on the agent scorecard.

On the other hand, QA evaluators should assess the customer's call compliance experience for KPIs such as ownership of a customer and business issues. You should consider the following call quality standards and KPIs for the development of a QA form and agent scorecard:

Compliance Standards and KPIs

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2. Agent Ownership of Customer Issues

a. Information Sharing

- All key information was provided
- Asked pertinent questions to understand the issue accurately
- Use an online knowledge management tool
- Made notes or tags reason of why the customer called
- Agent took clear and complete notes and entered them in CRM

b. Call Handling

- Adhered to customer transfer or escalation guidelines
- Used appropriate resources and approach to address call reason
- Adhered to customer hold guidelines
- Maintained adherence to the script or guidelines
- Was efficient in handling the call (e.g., appropriate call length)

c. Customer Service Quality

- Asked and confirmed if the call resolved
- Accurate information was provided (prevented customer call-back)
- All customer questions were answered correctly
- Summarized call main points)after-call work not required)
- Provided the most appropriate solution
- Thanked the customer for their business and told them they were valued
- Used the customer's name throughout the call
- Expressed empathy for the issue, inconvenience, or costs related to the issue
- Took ownership of resolving call reasons

CX Standards and KPIs

1. Customer Assessment of CX

- The call resolved
- The customer was very satisfied with the agent
- There was a positive customer experience (e.g., happy)

3. Agent Ownership of Business Issues

A. Security

a. Verified call access to account information
b. Updated or confirmed account information (e.g., email, phone number, address)
c. Adhered to government laws (e.g., HIPPA)

B. Selling of Products and Services

a. Leveraged upselling and cross-selling opportunities
b. Charged correct fees (did not waive fees or under-charge)

3. Implement Call Quality Monitoring Software

It's essential to determine the right call quality monitoring software and to implement them. Below are the indispensable call quality monitoring software required for your QA program to work effectively and efficiently for evaluating calls.

Call Recording software records a voice conversation over an audio source. At SQM, we recommend that 100% of calls are recorded. Caller calls can be recorded and stored as a digital file to be transcripted or listened to for playback purposes. Calls recorded are used for conducting QA evaluations, agent coaching, and training.

Text Analytics software is a machine learning technique that automatically extracts valuable insights from unstructured text data. For example, call centers use text analytics to increase the understanding of the customer experience by using text analytics for specific words or phrases to discover satisfaction and dissatisfaction levels. In addition, text analytics can provide insights into customer sentiment and experience trends.

Speech Analytics software analyzes call recordings or live customer calls using speech recognition for quality assurance evaluations. Also, the software is used to identify selling opportunities and track regulatory compliance. Speech analytics software identifies words and analyzes audio patterns to detect customer sentiments, emotions, and stress in a caller's voice.

Customer Service QA software brings telephony calls, quality assurance, and post-call survey data into fully integrated software for managing customer service data. The customer service QA software tool assists call center agents and managers in tracking, benchmarking, and improving FCR, Csat, NPS, quality assurance, costs, and customer service. Also, the software captures and reports internal data (e.g., ACD, QA) and external data (e.g., web, email, and phone surveys) for agent scorecards, accountability, coaching, and recognition. Actionable reports are pushed out to agents and managers in real-time to improve customer service continually.
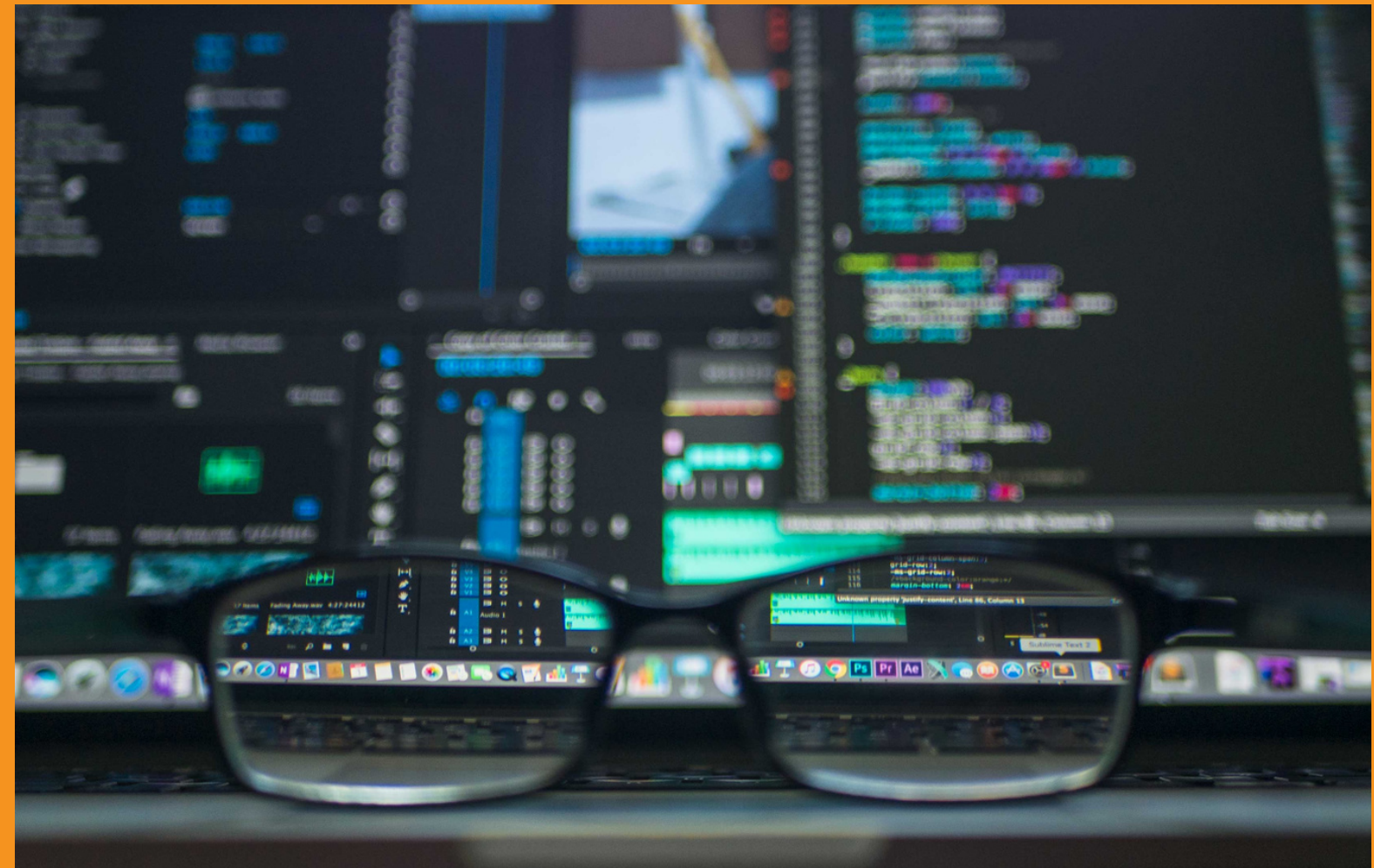
4. Analyzing QA Scorecard Results

Analyzing call quality agents using a scorecard is a best practice for grading an agent's ability to effectively and efficiently handle customer interactions. The scorecard provides insights into an agent's performance against your call center's standards and KPIs that can be used to make the appropriate changes in an agent's behaviors, knowledge, skills, and abilities. Furthermore, analyzing and benchmarking the scorecard results can help identify the root causes hindering agents from delivering great CX.

SQM group has conducted hundreds of quality assurance case studies with leading North American company call centers. SQM's research shows that a whopping 81% of agents' QA scores did not correlate with Csat resulting from traditional QA scorecard evaluations.

The low correlation between traditional QA and Csat scores is because the wrong metrics and weighting used to evaluate the call and the customer's viewpoint (e.g., post-call survey) is not used as part of the QA evaluation of the call.

In addition, with a traditional QA method, a QA evaluator or supervisor listens to the calls and evaluates the customer's experience. Regardless of the metrics used, weighting, or the employee who conducts the quality assurance evaluation, what remains evident is that in a traditional QA program, an employee is judging the customer's experience and not the customer's viewpoint.

Conversely, the customer service QA scorecard Csat correlates highly to QA scores.

The main reason for the high Csat and QA score correlation is that the QA evaluation form includes CX and call compliance metrics. A customer judges CX via a post-call or email customer survey and artificial intelligence, and a supervisor or QA evaluator evaluates the call compliance metrics. Furthermore, CX metrics are weighted higher than call compliance metrics.

The bottom line is that the customer service QA scorecard correlations show when a Csat score is high or low, so is the QA score. Having the customer evaluate their experience when interacting with a company's call center is considered an outside-in approach. Nevertheless, it can be a valuable practice for ensuring the company is customer-centric in the way it operates.

TRADITIONAL QA VS. CUSTOMER SERVICE QA SCORES CORRELATION TO CUSTOMER SATISFACTION

Traditional QA Scorecard

Customer Service QA Scorecard
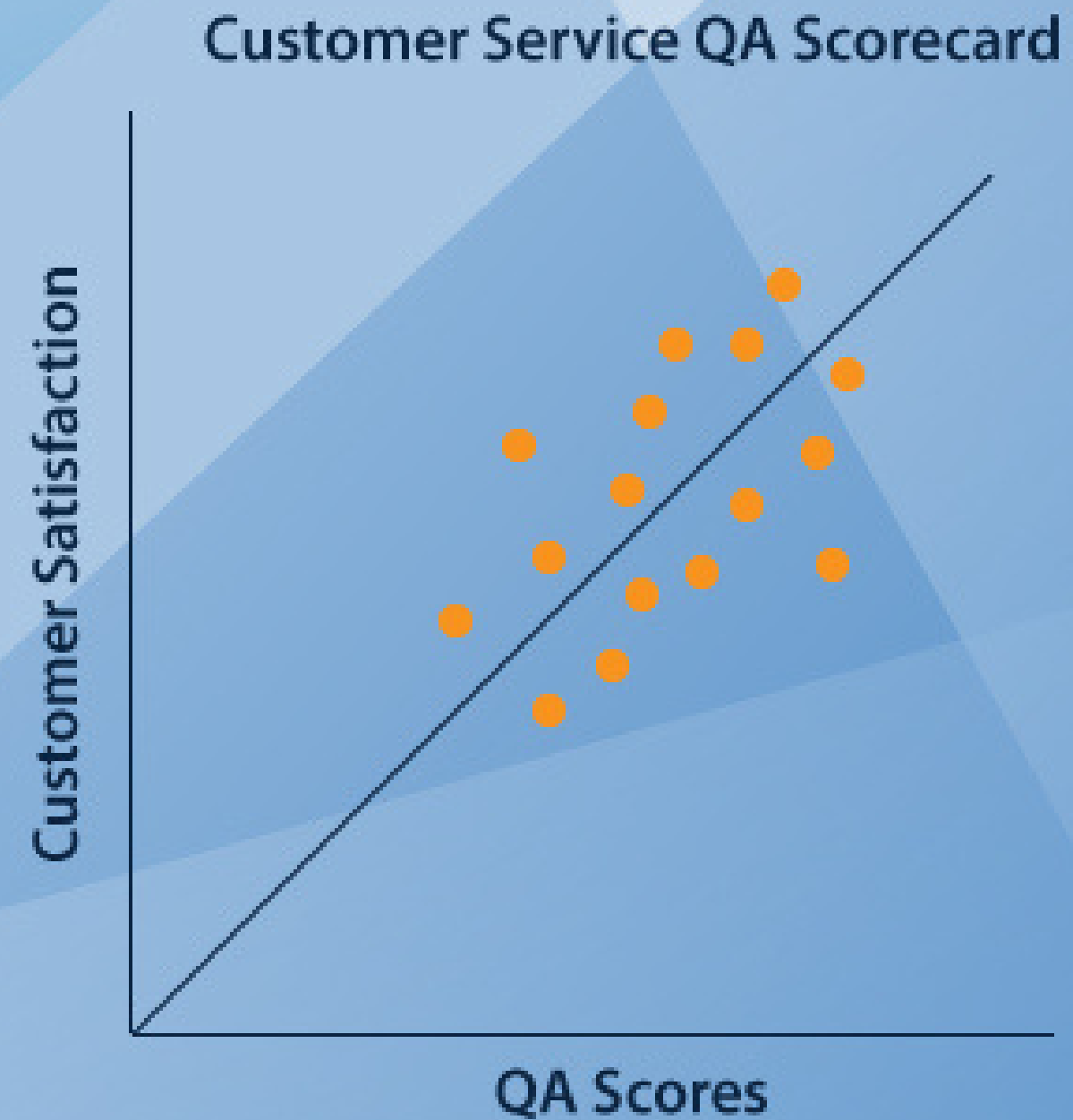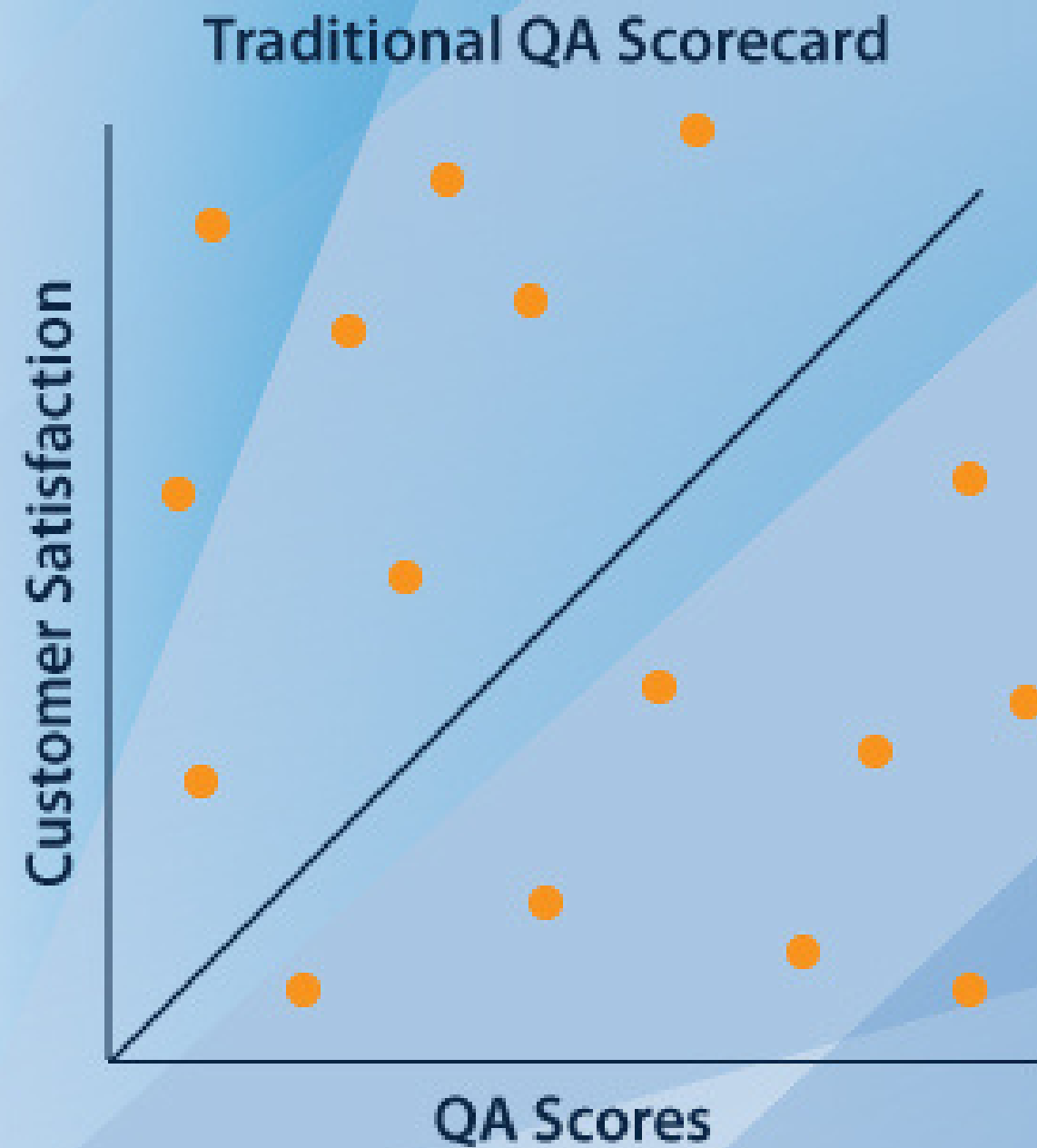
5. Providing Agent Coaching and Training

SQM experience shows that agent coaching is the best practice for an agent to understand the weaknesses that need to be addressed and strengths that they can build upon to improve their customer service quality assurance (CSQA) scorecard performance. The following are six coaching tips a supervisor can use to improve an agent's CSQA scorecard:

SIX COACHING TIPS

1 Survey and Call Compliance Data

2 Positive Tone and Feedback

3 Goal Setting

4 Role Playing

5 Actively Listening

6 Recognition Reinforcement

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Six Coaching Tips

1. Survey and Call Compliance

CSQA scorecard combines CX metrics, judged by a customer via a post-call or email customer survey, and call compliance metrics, judged by a QA evaluator, to evaluate the same call. CSQA provides a holistic approach to delivering great CX insights. CSQA is based on letting the customer be the judge of their experience when using a call center and is one of the best ways for coaching agents to improve their call resolution rate and Csat score. Agents value using survey and call compliance data from the same call to help them improve their customer service delivery because there are areas that a QA evaluator can judge more effectively and areas that the customer can judge more effectively.

2. Positive Tone and Feedback

Supervisors must use a positive tone for agents to be receptive to constructive feedback about improving their CSQA performance. It is helpful to start the coaching session with positive feedback, then constructive or negative feedback, and close the session with positive feedback. During the coaching session, use the agent's own CSQA scorecard data for providing positive and negative feedback. Doing so makes the coaching session more sincere and meaningful for agents.

3. Scorecard Goal Setting

Agent scorecard goal setting should be a collaborative approach. If the agent is not engaged in scorecard goal setting, they are likely not committed to achieving the CSQA scorecard target. In addition, the CSQA improvement scorecard goal must be attainable. For example, based on 100 available points, a conservative CSQA improvement scorecard goal is 5 points, a moderate CSQA improvement scorecard goal is 5 to 10 points, and an aggressive CSQA improvement scorecard goal would be 10 points or more. Unfortunately, only 5% of call centers achieve 10 points or more increase in the overall CSQA scorecard annually. Once the agent goal is agreed upon, you can discuss and develop an action plan to achieve the CSQA scorecard goal.

Six Coaching Tips
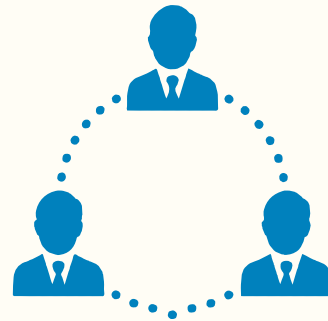
4. Role Playing

Agent role-playing is a customer service exercise where agents practice call-handling techniques for specific call reasons, with a fellow agent or supervisor acting as the customer. In addition, role-playing with other agents or the supervisor for call handling certain call types in a safe, learning environment – makes it much easier to put new skills into practice before doing it with customers. Agent role-playing is often used in training or when implementing new pricing, products, services, and policies, but it also can be an effective CSQA coaching technique.

5. Actively Listening

It is often said that great coaches are great listeners. For a supervisor to be a great coach, they need to be an active listener (e.g., pay attention, probe, clarify, and confirm) to ensure understanding of what an agent said and respond to what was said. Repeating some mentioned keywords conveys that you understand what they have expressed. Active listening keeps both agent and supervisor actively engaged in the conversation. Furthermore, asking an agent to self-assess how they handled a specific call helps ensure productive coaching sessions. Doing so allows the supervisor to actively listen and collaborate with an agent to develop ways to improve their CSQA score.

6. Recognition Reinforcement

After the agent coaching session, monitor calls for the next few days and look for opportunities where the agent demonstrated the new skills they learned from the coaching session. Moreover, share the recording and video with the agent as soon as possible. By doing so, you recognize and reinforce the agent's new skills on the call. In addition, agents feel the supervisor is paying attention to improving their skills and, as a result, will inspire and motivate them to continue to use those new skills and develop even more new skills.

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