

# Best Practice Award Winner

## Quality Assurance: Scotiabank Mexico

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*published 04-29-2014*



## **Best Practice - Quality Assurance Program: Scotiabank Mexico**

Our Quality Assurance Program has mixed the best practices of each of our teams, and together with the tools SQM provides, the result has been an improved customer experience.

A key component of our success for improving our Customer Satisfaction results year-over-year (2012 – 2013) has been our improved quality assurance and coaching process. We utilize vital VoC intelligence and target opportunities highlighted in the feedback data. We customized our performance monitoring and improvement methodology to align to what our customers are saying is important to them. Ensuring that our actions for improved service “moves the needle” on what VoC tells us they would like to see improved.

Our strategy was to implement and sustain several significant improvements to our Quality Assurance & Coaching Process. Each of the following tactics contributed to enhancing our VOC results:

### **Floor Effectiveness Coaches**

Our quality department used to monitor calls based on compliance and agent skills. We divided this position into two specific roles: Floor Effectiveness Coaches and Compliance Analysts.

#### **Floor Effectiveness Coaches (FEC)**

Their mandate is to dedicate 100% of their time coaching real-time, one skill at a time. The purpose was to ensure focused and frequent coaching sessions while providing agents with more support in the pursuit to master each core service skill. Coaching feedback was based on live and remote call observations. All skill based coaching plans were aligned to supervisor’s development plans for each agent. Essentially, FEC and Supervisors complimented each other in that one role (Supervisors) focused on overall agent development plans and the other role (FECs) focused on agent skill mastery – enabling agents to reach performance targets. In order to support this new coaching process an activity management and reporting tool was developed, providing FECs with the ability to record all coaching activities and see trends of agents, teams and FECs.

#### **Compliance Analyst**

Their mandate is to mitigate risk according to the company politics and Industry regulations. The main focus of Compliance Analysts is the compliance of calls.

We were able to reduce the overall amount of people (Quality Officers vs. Compliance + FEC) performing this function by 20% and redeployed their efforts towards more agent development and quality improvement activities.

Besides having more experienced people on the floor helping agents (FEC), we went from 8 monitoring formats to only 1 monitoring universal format. This new format has an improved weighting balance, focusing more on Customer Experience (60% of score coming from VoC) vs. Compliance regulatory issues (40% of score coming from compliance).

Amongst the benefits and gains we had in moving to only one scorecard we have:

### **Customer Satisfaction**

- Focused on what is important for our customers
- Improved FCR
- Improved WCC
- Currently Call Center is now trending at World Class levels.
- We match the SQM survey to the call to be monitored

### **Operationally**

- Impacts the contact Centres balanced score card
- Make job easier, faster & friendlier for analyst
- Aligned with Supervisors action plans
- Expedite Calibration process
- QA parameters are standardized across the Call Centre

### **Reporting**

- In-House database tool created
- Dynamic reports, drill down per category, agent, QA officer trends
- Reports showing strengths & opportunities
- Made trending & comparison easier
- Incorporated Historical reports
- Information is available in real-time, reports are on-line

### **Employee Engagement**

- Development was a collaboration of different areas  
Agents, Sups, Managers & Directors participated
- Total buy in from the entire Contact Centre
- Easier for agents to understand how they are being measured
- A more effective format for coaching purposes

## About SQM

**Since 1996, SQM has been a leading North American contact channel research firm VoC expert for measuring and improving organizations' FCR, operating costs, employee and customer satisfaction.** We have done this by being operationally excellent at benchmarking, tracking, consulting and recognizing our clients' FCR, employee (Esat) and customer (Csat) satisfaction performance. Over 70% of our tracking clients improve their FCR and operating costs year over year. For the average call center SQM benchmarks, a 1% improvement in their FCR performance equals \$256,000 in annual operational savings. Our research also shows that when you improve your FCR, not only do you achieve operational savings, you also reduce customers at risk which is typically a 5-10 times greater savings opportunity than the operational FCR improvement savings.

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