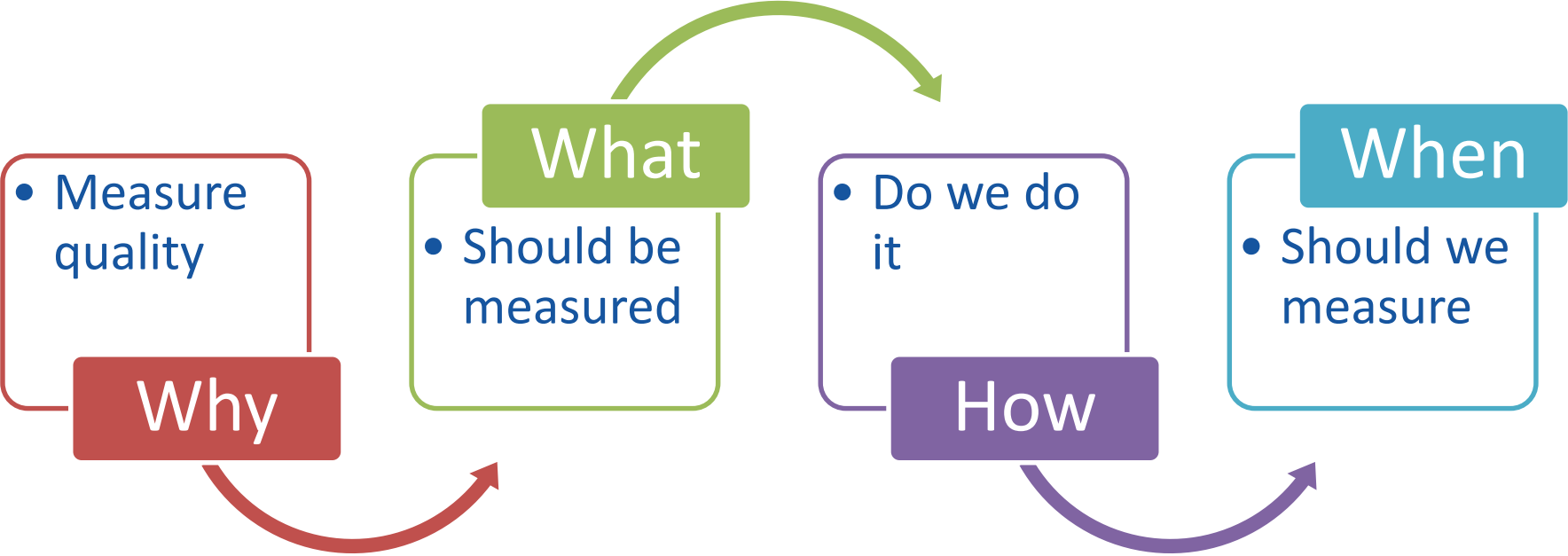


# The Best Ways to Design a Quality Scorecard

Martin Jukes

# What are the considerations?



# Why have a Quality Scorecard?

Measure Advisor  
performance

To ensure we are  
compliant with  
regulations

Report as a KPI

To change  
Advisor  
behaviour

Measure the  
Customer  
Experience

Check up on our  
Agents

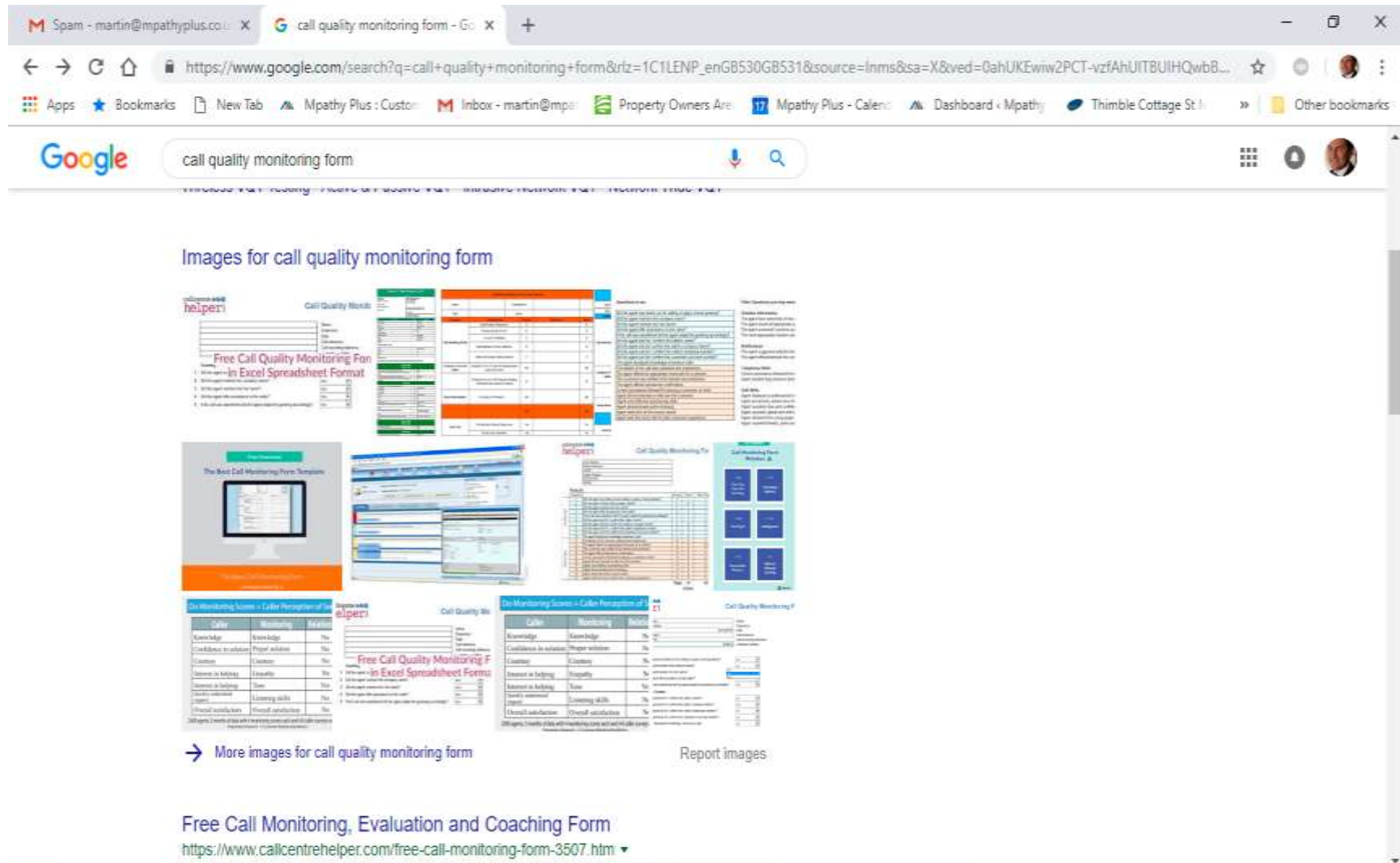
To motivate the  
team

# Manage



# Can we download one?

Yes ..... about 239,000,000 results (0.55 seconds)



# Can we download one?

So which one should you use?

Measures need to be specific to your organisation



What are the objectives of measuring quality?

What is the customer service strategy?

- Compliance?
- Follow the process?
- Customer experience/empathy or hard sell?

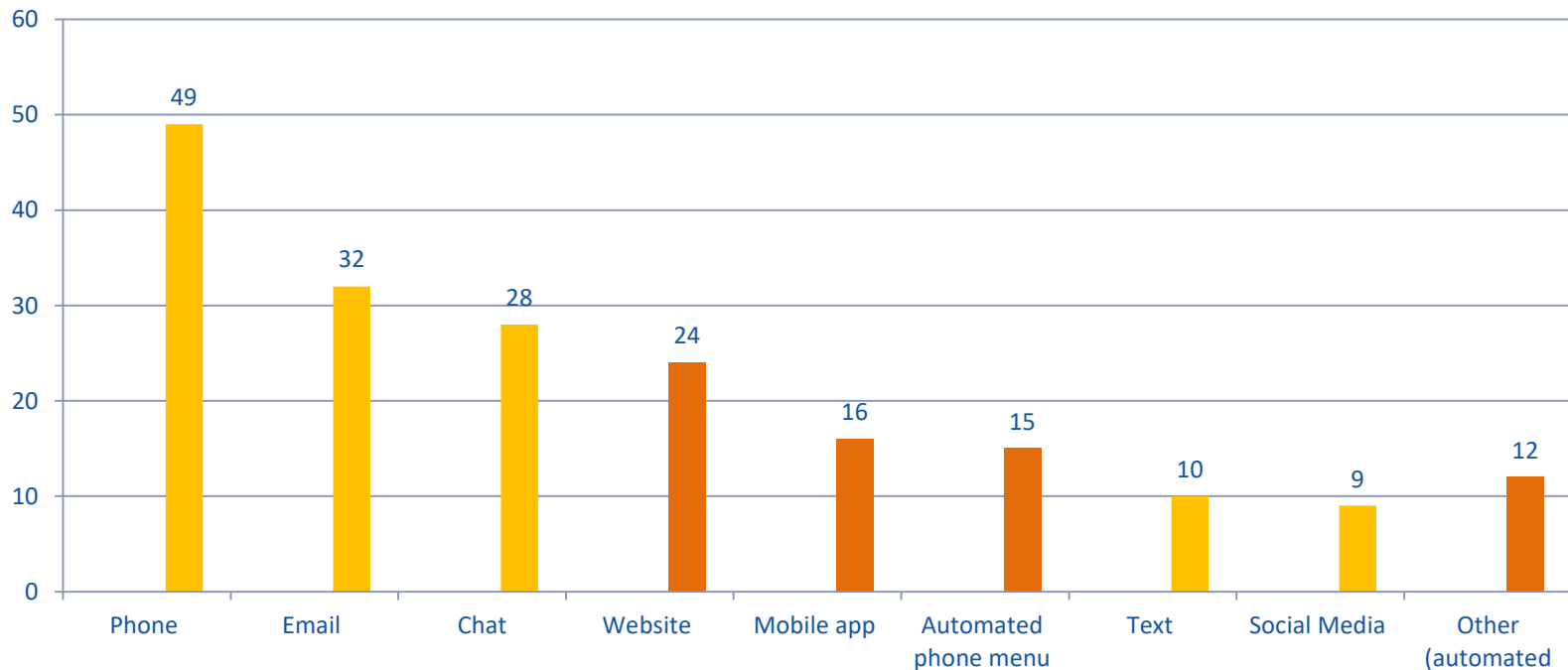
INDIVIDUAL Requirements to meet INDIVIDUAL organisational needs

# Which channels?

CRQM focus has traditionally been on calls – Evaluate8 shows that little else is measured

But as customers we use a range of channels

## Channels used



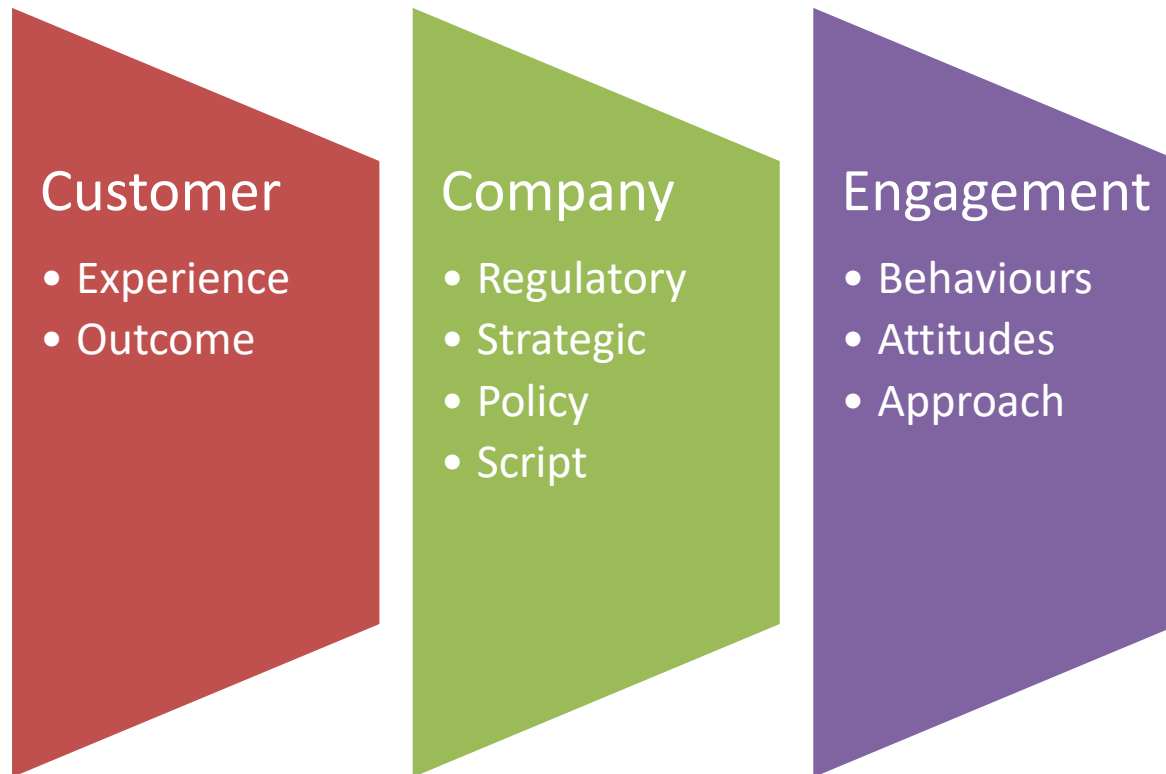
Data extracted from NICE inContact Customer Experience (CX) Transformation Benchmark

Ensure that measurement is appropriate for channels used

- Rules of engagement vary by channel

# What to measure

## What is important and relevant to measure?



Objective and subjective measures

For many organisations, quality is the main KPI for customer service



# Scoring



Objective

Subjective

Yes      No

Not all topics measured have equal values so consider factoring

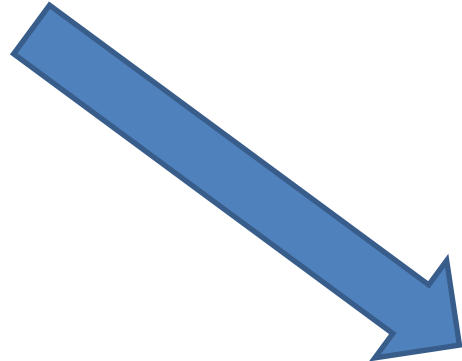
Score	Select
0	
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	

# Not applicable/Not appropriate

Not every measure is applicable or appropriate for every contact. N/A is a valid entry in some cases.

## Mistakes observed

- Inappropriate rules
- Irrelevant questions

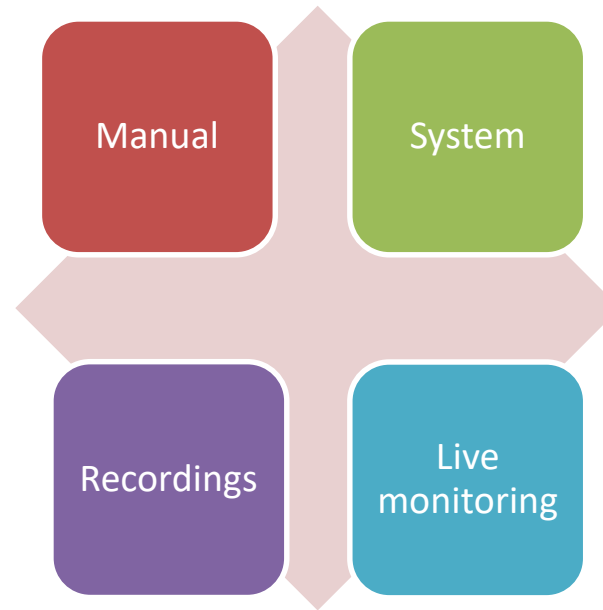


Score	Select
0	
1	
2	
3	
4	
5	
N/A	

A good contact should be relevant and personalised to that customer even if it does not tick every box

Don't create a scorecard that kills empowerment!

Very easy to complicate



Ensure easy to record and share

e.g. Q5 has a factor of 3.5 and a score range of 1 – 10  
with a number of different ‘must have’ phrases that must be used in the same sequence  
or the score reduces by 35% etc.

**Did it feel right?**

# Using the data

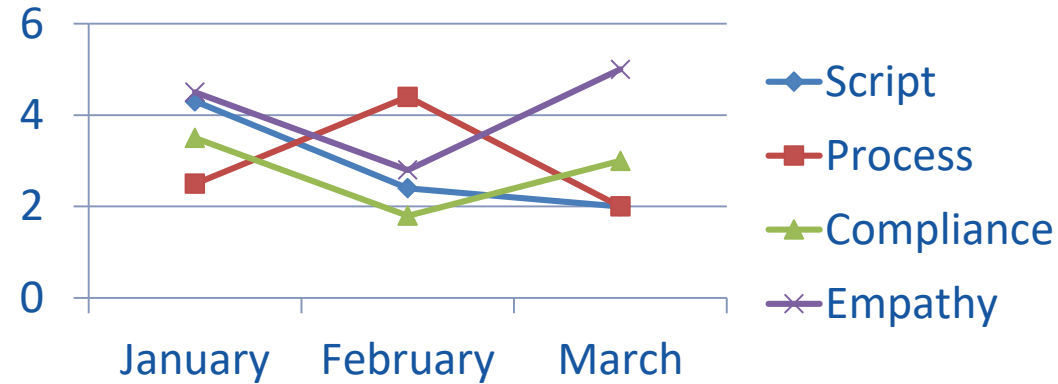
Feedback in one to ones

Identifying training needs

Review of overall performance

Present positive and negative findings

# Identifying trends



Individual is easy to track but sample size can influence

Team is interesting as it shows behavioural trends

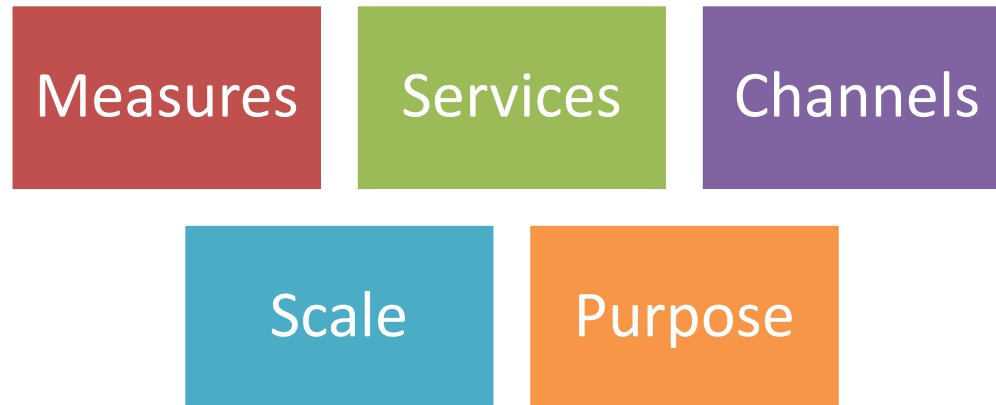
Identifying t

Easy to fix through re-enforcement but need to understand the cause of behavioural change

# How much? How often?

Sufficient to enable performance and quality management  
but not too much that it becomes onerous!

A number of factors



Can increase or decrease in size but would recommend monthly  
measure for all team to align with one to ones

1

- Communicate the purpose and the benefits

2

- Share the model and the questions

3

- Involve Advisors in developing the scorecard and the process

# Summary

Think about your specific requirements

Measure quality across all channels but modify

Ensure flexibility and have 'not applicable' as an option

One size does not fit all

Use the data