

USING QA TO DELIVER MEASURABLE IMPROVEMENTS IN CUSTOMER EXPERIENCE

INSTRUMENTING YOUR QA PROCESS





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Founder & CEO, Scorebuddy

Derek has over 30 years' experience working in the contact center technology providing operational consultancy, technical solutions and designing Contact Center applications and tools. Derek provides thought leadership based on real world observations and a deep understanding of the contact center ecosystem.

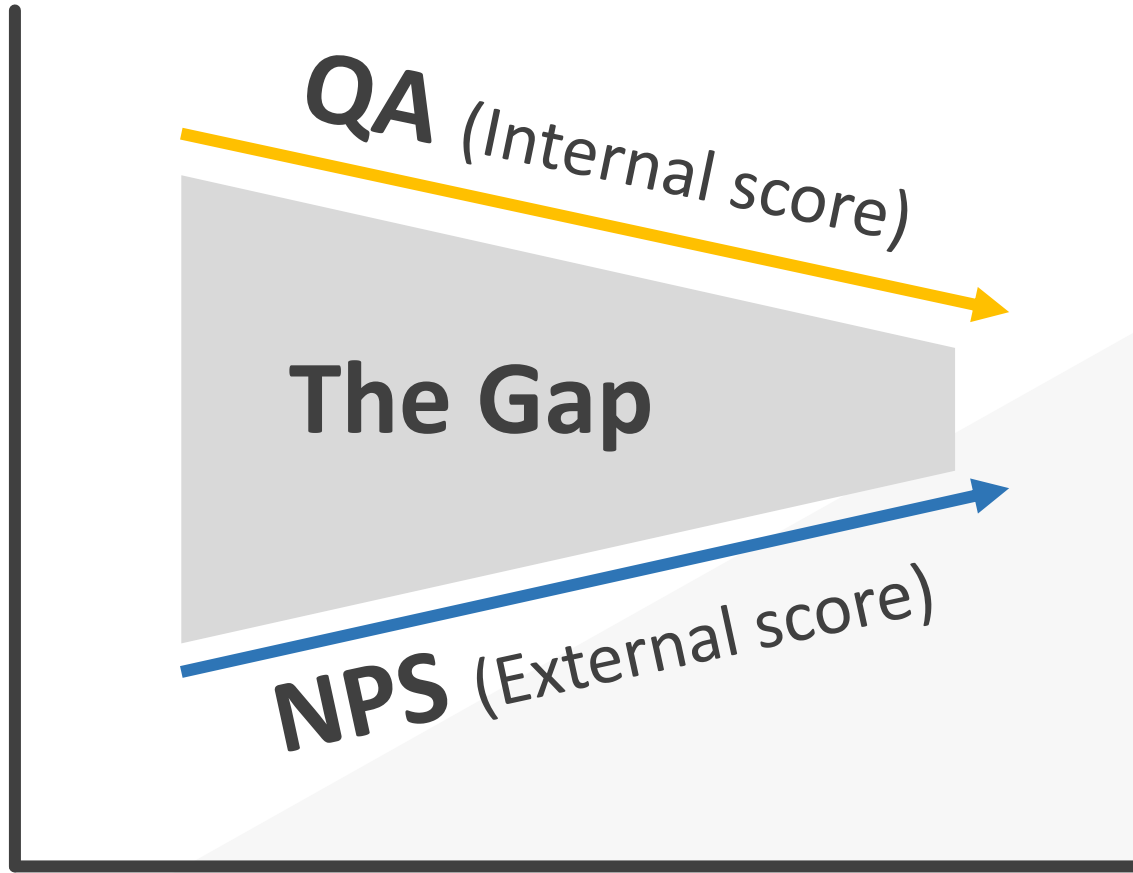
THE GAP BETWEEN QA & CSAT



Bridging the gap with new approaches and tools.

Use CSAT scores to help bridge the QA gap

Goal is to align internal QA scoring with CSAT scores



- Gathering CSAT scores and comments will inform your scorecard design
- Review comments and categorize as positive and negative
- Identify what customers rate as important
- Revise the weightings and communicate to your agents

WHY DO SO FEW CONTACT CENTERS MEASURE CSAT?

“Marketing Dept own surveys”

“It’s hard to set up”

“No one in here knows how to design a survey”

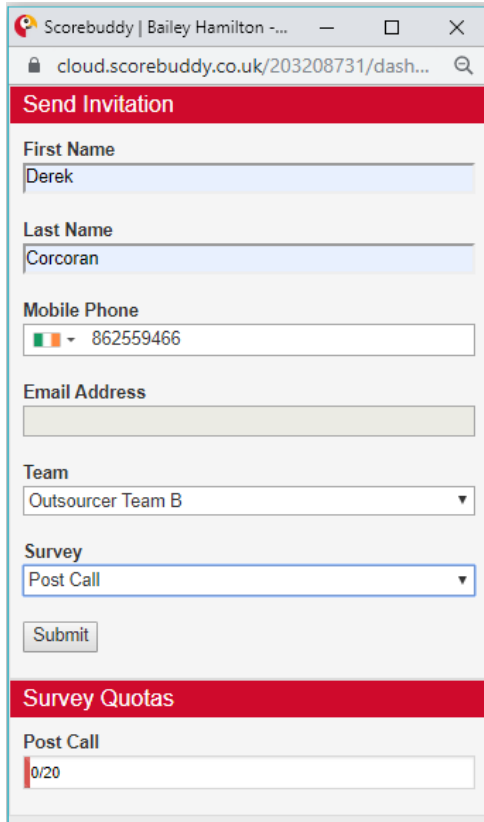
“We haven't got the time”

“I've no budget”



It's not as difficult as you may think!

Agent Widget



A screenshot of a web browser showing the Scorebuddy Agent Widget. The browser address bar displays "cloud.scorebuddy.co.uk/203208731/dash...". The page has a red header with "Send Invitation". Below this, there are several form fields: "First Name" (Derek), "Last Name" (Corcoran), "Mobile Phone" (862559466), "Email Address" (empty), "Team" (Outsourcer Team B), and "Survey" (Post Call). A "Submit" button is located below the "Survey" dropdown. At the bottom, there is a red header with "Survey Quotas" and a "Post Call" field showing "0/20".

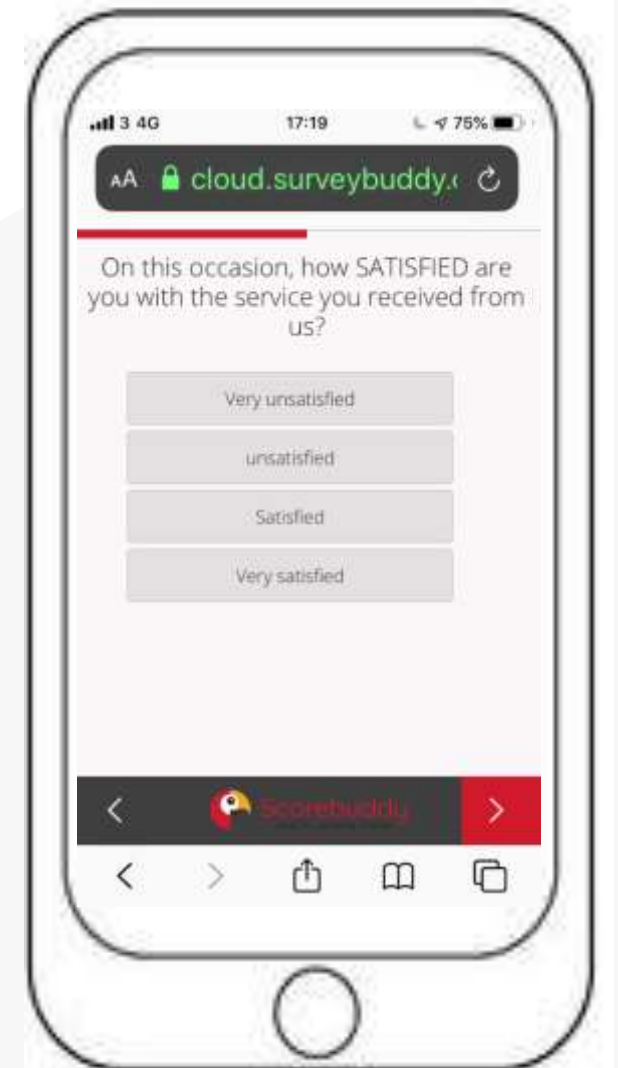
Hi Derek, got a sec....Please take our 30 sec survey.
<http://sbdy.co/6sGCUA1/mmbsssd>

3 x Killer Questions

Rate the agent?

How satisfied were you?

Would you recommend us?





WHAT ARE SCOREBUDDY CLIENTS MEASURING?

QA Focus depends on priorities, sector and channel

- **Soft skills**
- Process
- Compliance
- Outcome

LISTENING

DID THE AGENT DISPLAY ACTIVE LISTENING SKILLS

SOFTSKILLS

DID THE AGENT BUILD RAPPORT AND SHOW UNDERSTANDING OF THE CLIENT

WAS THE AGENT TONE AND PITCH APPROPRIATE TO THE MOOD OF THE CALL?

DID THE AGENT SUMMARISE THE FOLLOWUP PLAN?

SOFTSKILLS COMPLIANCE

WAS THE AGENT PROFESSIONAL AT ALL TIMES?

QA Focus depends on priorities, sector and channel

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- **Process**
- Compliance
- Outcome

PROCESS COMPLIANCE

DID THE AGENT FOLLOW THE CORRECT PROCESS

DID THE AGENT FOLLOW THE COMPENSATION PROCESS

DID THE AGENT TERMINATE THE CALL CORRECTLY

DID THE AGENT UPDATE THE NOTES IN THE CRM CASE


QA Focus depends on priorities, sector and channel

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- **Compliance**
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COMPLIANCE	
IDENTIFICATION & VALIDATION	<input type="radio"/> Pass <input type="radio"/> Fail <input type="radio"/> N/A
IDENTIFYING & HANDLING VULNERABLE CUSTOMERS	<input type="radio"/> Pass <input type="radio"/> Fail <input type="radio"/> N/A
SEEKING PERMISSION FOR CREDIT CHECK	<input type="radio"/> Pass <input type="radio"/> Fail <input type="radio"/> N/A

QA Focus depends on priorities, sector and channel

- Soft skills
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- Compliance
- **Outcome**



Team: Outsourcer Team A

Supervisor: Kiera Barber

Event Date: 05/11/2019

Event Time: 13:09:39

Customer Type: Select...

Why NA:

Event Duration: hh:mm:ss

Event Type: -- Event Types --

Sub Type: choose an event type first

Reference:

NPS PREDICTOR

Detractor

Passive

Promoter

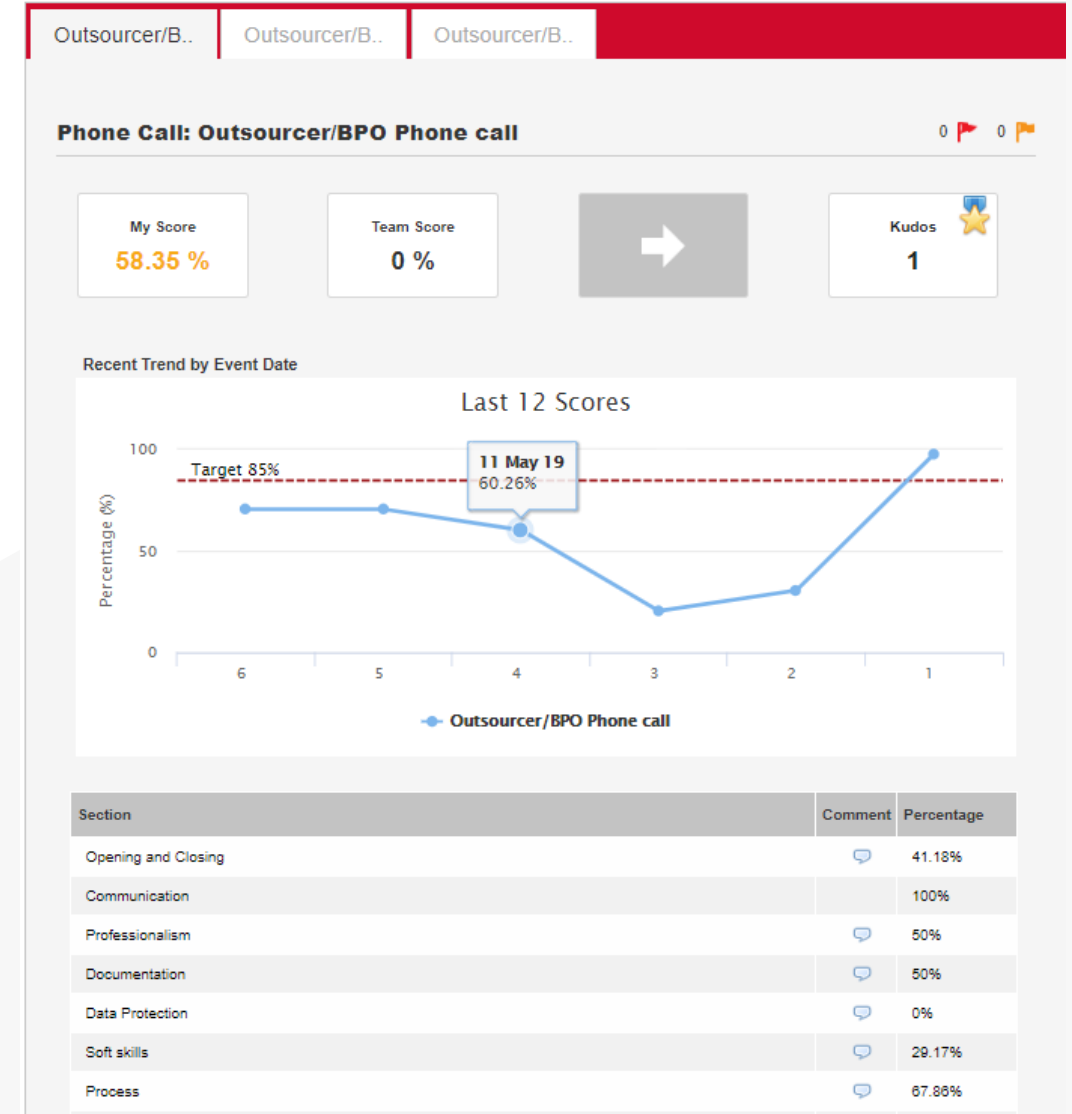
Custom Tag

Sep 2, 2019 at 11:27 am

Feedback to the Agent

HOW IS YOUR QA PROCESS PERCEIVED?

- Traditional Numeric



Feedback to the Agent

HOW IS YOUR QA PROCESS PERCEIVED?

- Traditional Numeric
- Non-Numeric

Outsourcer/B.. Outsourcer/B.. Outsourcer/B..

Email: Outsourcer/BPO E-mail 0 2

My Score
Very good

Team Score
Development needed

Kudos
1

Recent Trend by Event Date

Last 12 Scores

Section	Comment	Result
Spelling and Grammar		Getting there
Effective communication		Very good
Templates		Development needed
Professionalism		Stunning

Feedback to the Agent

HOW IS YOUR QA PROCESS PERCEIVED?

- Traditional Numeric
- Non-Numeric
- Success Card

Outsourcer/B.. Outsourcer/B.. Outsourcer/B..

Chat: Outsourcer/BPO Chat 0 🚩 0 🚩

Team Success %

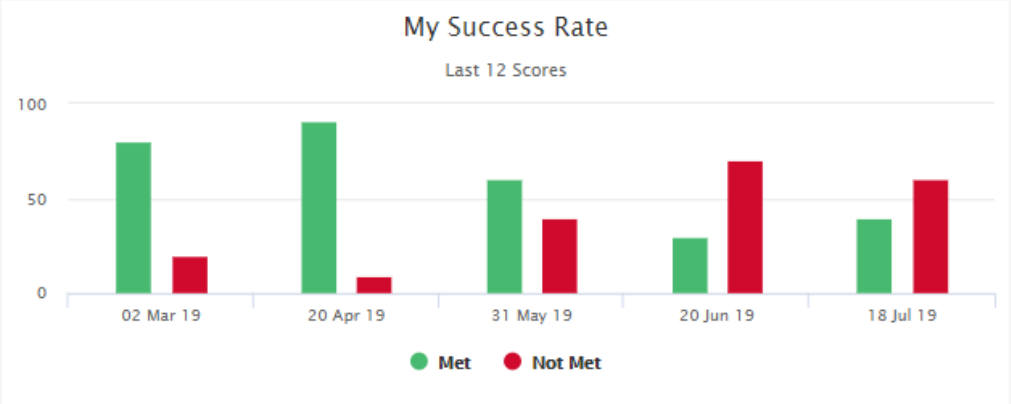
My Success %

➔

Kudos 🌟
0

Recent Trend by Event Date

My Success Rate
Last 12 Scores



Section	Comment	Met	Not Met
Opening and Closing	💬	Met 80.00 %	Not Met 20.00 %
Personalization	💬	Met 61.11 %	Not Met 38.89 %
Recommendation	💬	Met 60.00 %	Not Met 40.00 %
Experience		Met 46.15 %	Not Met 53.85 %

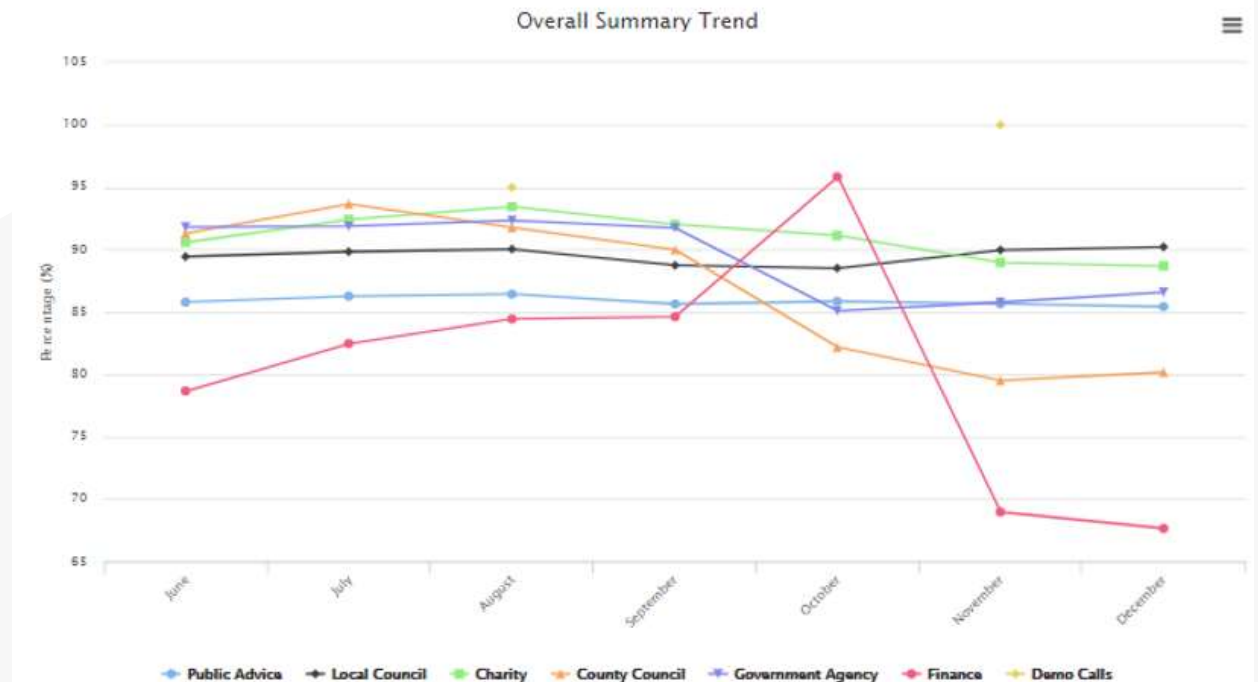


GATHERING RICH DATA

Looking for Gaps & Patterns

- Collect the data with analysis in mind
- Annotating and tagging results delivers greater insight
- It's no longer just assessing agents it is about what drives or hinders your service quality

GROUPS	TOTAL	- TARGET	+ TARGET	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
Public Advice	85.91%	3123	5354	85.79%	86.27%	86.43%	85.64%	85.85%	85.66%	85.43%
Local Council	89.51%	260	2661	89.44%	89.83%	90.04%	88.74%	88.51%	89.97%	90.21%
Charity	90.89%	71	221	90.58%	92.42%	93.45%	92.01%	91.13%	88.97%	88.69%
County Council	88.44%	221	652	91.31%	93.66%	91.76%	89.99%	82.17%	79.50%	80.17%
Government Agency	89.23%	236	695	91.81%	91.87%	92.34%	91.74%	85.09%	85.78%	86.59%
Finance	80.82%	33	32	78.67%	82.47%	84.44%	84.62%	95.83%	68.97%	67.65%
Demo Calls	95.80%	2	5			94.99%			100.00%	



Add Detail

Use the evaluation session to add categories and tags with little additional overhead!

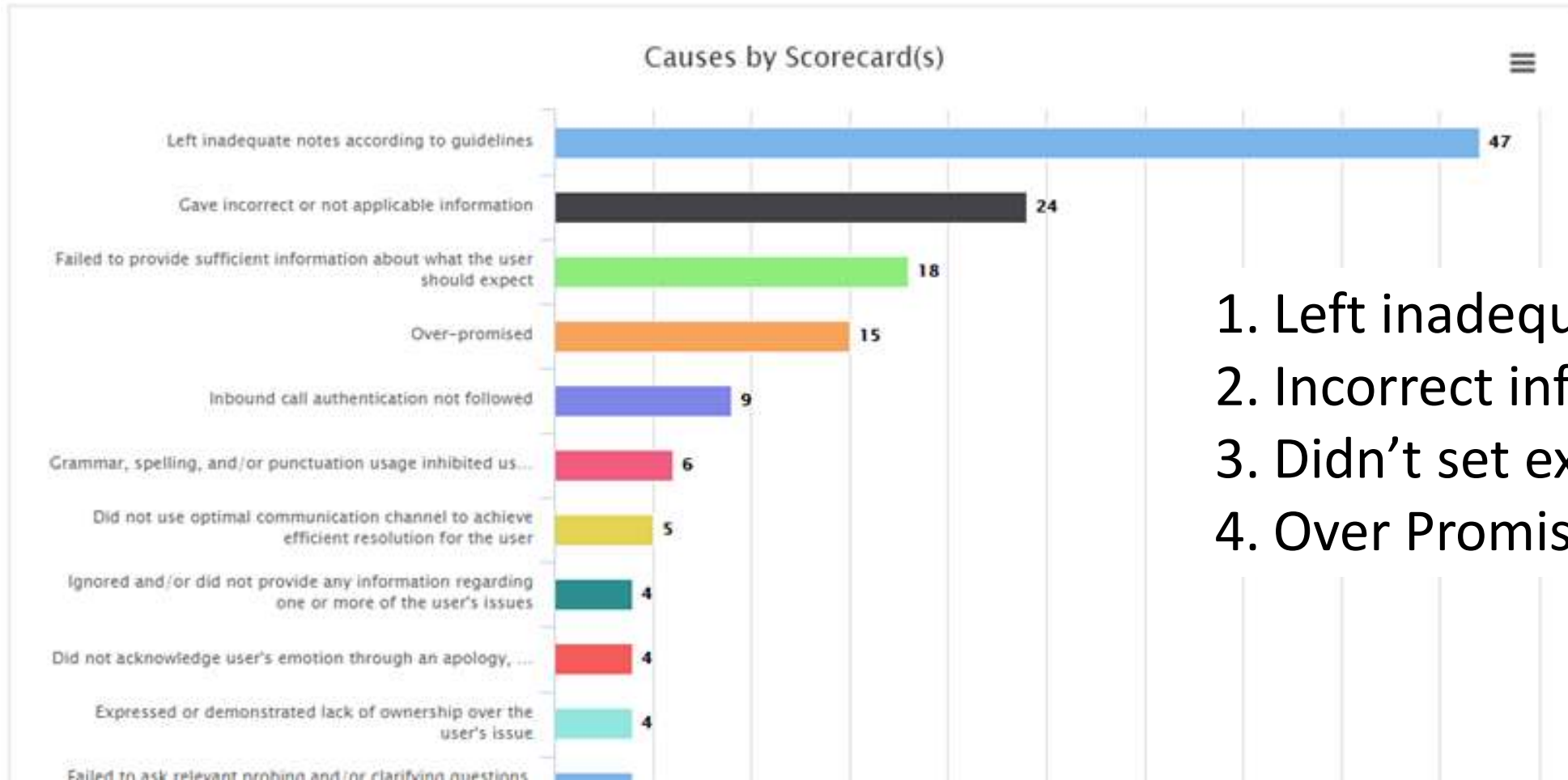
The image shows a screenshot of a form with several fields. Annotations with blue arrows point to specific parts of the form:

- Meta Data:** Points to the top section of the form containing fields for Team, Supervisor, Event Date, Event Time, Event Duration, Event Type, Sub Type, and Reference.
- Custom Fields:** Points to the Reference field.
- Custom Objects:** Points to the CX Channel dropdown menu, which is open and showing options: Inbound phone, Outbound phone, CX Messaging, Email, and Live Chat.
- Root Causes:** Points to the Language dropdown menu, which is open and showing a list of causes: Inappropriately shared personally identifiable information, Took action as the user within the user's account, Country specific call regulations not adhered to, Inbound call authentication workflow not followed, and Outbound call authentication workflow not followed.

The form fields are as follows:

Team	<input type="text"/>	Event Duration	<input type="text" value="hh:mm:ss"/>
Supervisor	<input type="text"/>	Event Type	<input type="text" value="-- Event Types --"/>
Event Date	<input type="text" value="31/10/2019"/>	Sub Type	<input type="text" value="choose an event type first"/>
Event Time	<input type="text" value="22:26:05"/>	Reference	<input type="text"/>
CX Channel	<input type="text" value="Inbound phone"/>	Language	<input type="text" value="Select..."/>

The value of rich data...



1. Left inadequate Notes
2. Incorrect information
3. Didn't set expectation
4. Over Promised



TAKE AWAYS.....

Take Aways

Only you can determine the focus for your QA

- ✓ Soft skills
- ✓ Process
- ✓ Product Knowledge
- ✓ Problem Solving
- ✓ Compliance
- ✓ Risk

Take Aways

- Only you can determine the focus for your QA
- Focus changes over time, **Review-Revise-Reiterate**

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- Only you can determine the focus for your QA
- Focus changes over time, **Review-Revise-Reiterate**
- Linking QA effectively to CX outcomes helps alignment
- Keep in mind agent perceptions about their scores
- Adding 'tags' (categorizations) delivers insight and points the way

Trusted by the best

Scorebuddy delivers measurable, positive change.



50,000+

Agents managed
each week

200+

Customers
worldwide

58%

Our NPS Score
from customers

15%

Reported 15%
Increase in quality

