NEW THINKING ON QUALITY

PRESENTING:

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Why New Thinking on Quality Assurance?

What Has Changed

- Move to home with no plans to return to an office
- Different conversations can impact goals
- Less visibility into agent activity and CX
- Lack QA agility

What Hasn't Changed

- Advisors are critical to ensuring customer satisfaction
- Engaged and satisfied employees are:
  - 8.5x more like to stay than leave within a year
 - 3.3x more likely to feel extremely empowered to resolve customer issues

Source- Gallup

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QA BEST PRACTICES:
A 3 STEPS PLAN

Increase QA program agility

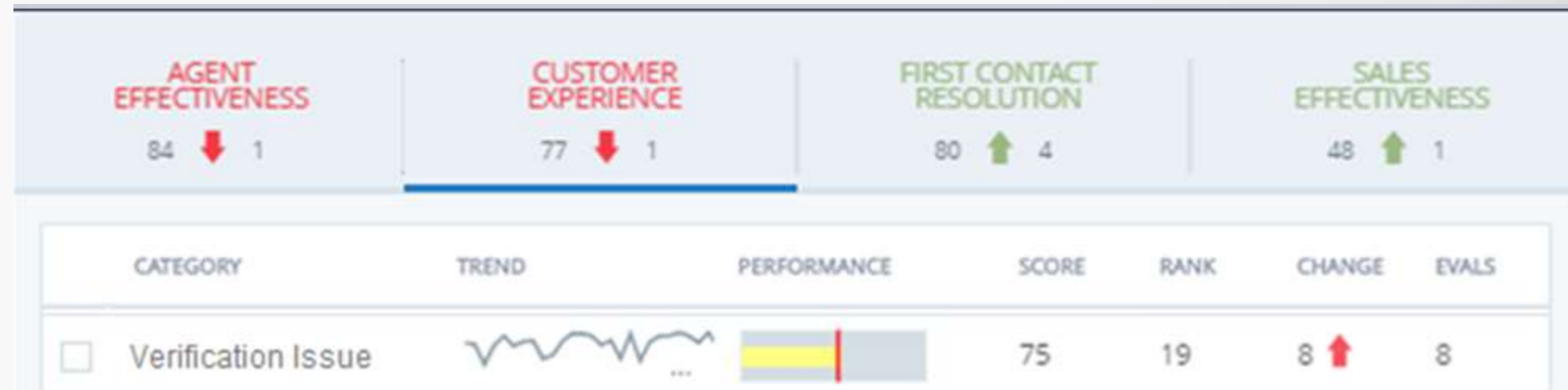Increase employee and customer satisfaction

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Step 1 – Quality Targeted Monitoring

- Supplement random selection with targeted monitoring using analytics

- Correlate to advisor performance, quality & coaching to metrics

- Start with a pilot program and expand

Agent CSAT Score chart with Coach Escalations annotation
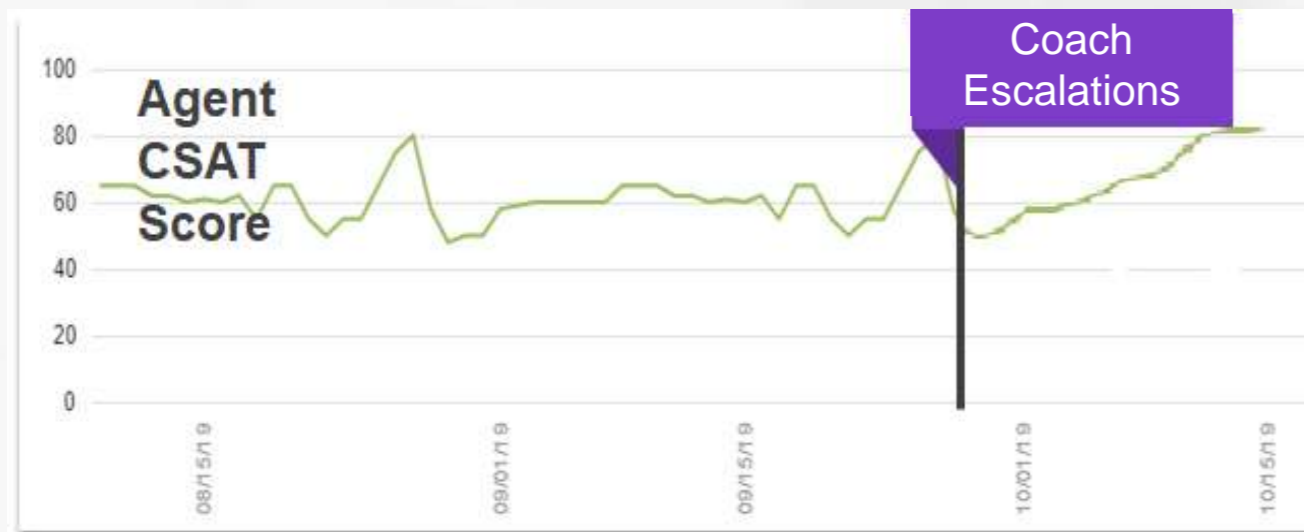
Step 2 – Metric Driven Quality

- Expand targeted analytics driven quality scope
- KPI scorecard with 100% scoring on targeted metric
- Supervisor, quality & agent automated processes & reporting
- Drive advisor empowerment

Supervisor and Agent Dashboard

Auto-Suggest Answers to Form Questions

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Step 3 – Quality Transformation
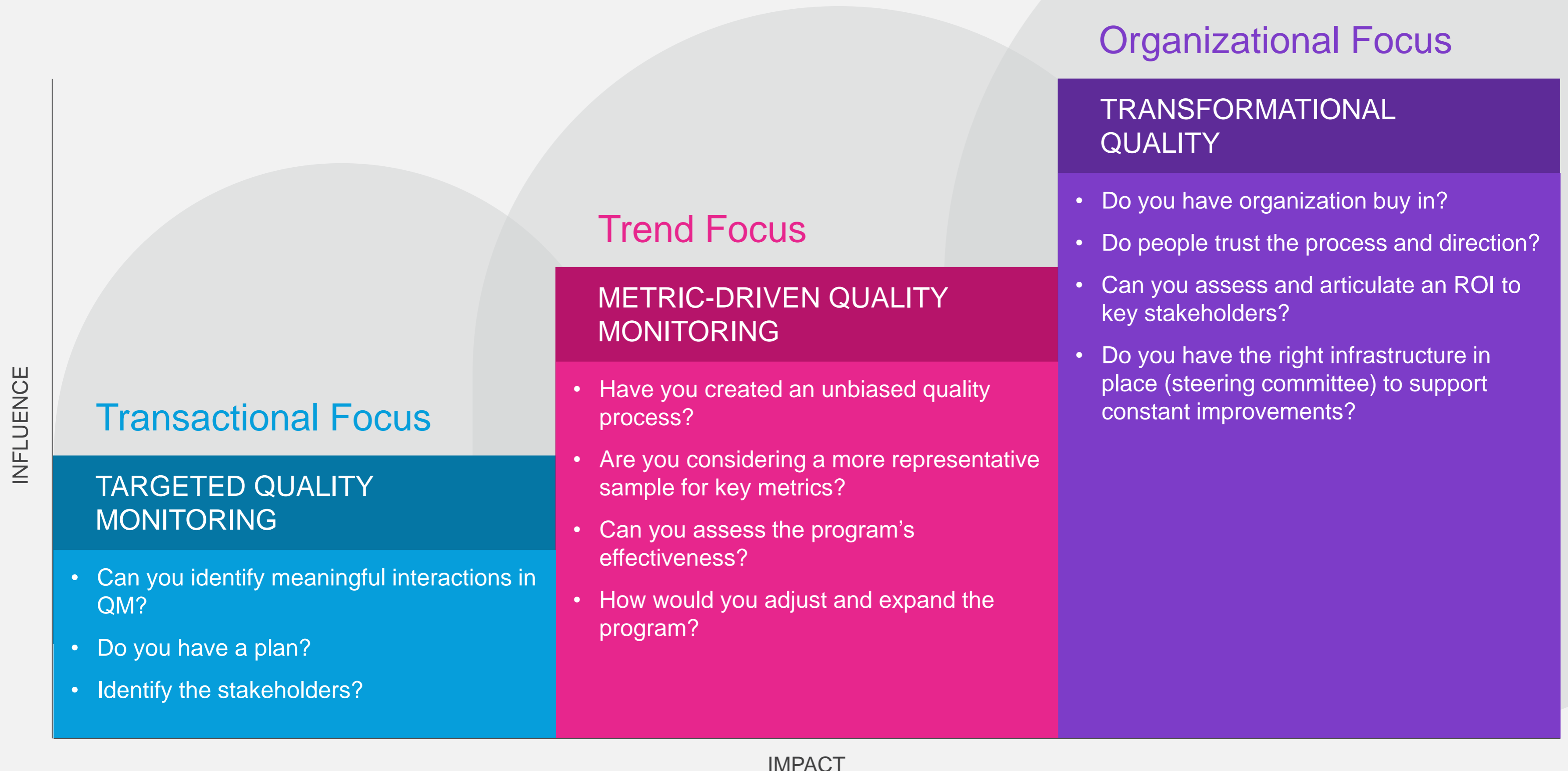
- Behavioral analysis vs transactional
- AI models scored behaviors
- Personalized, focused behavior-based coaching
- All levels of organization engaged and driving quality
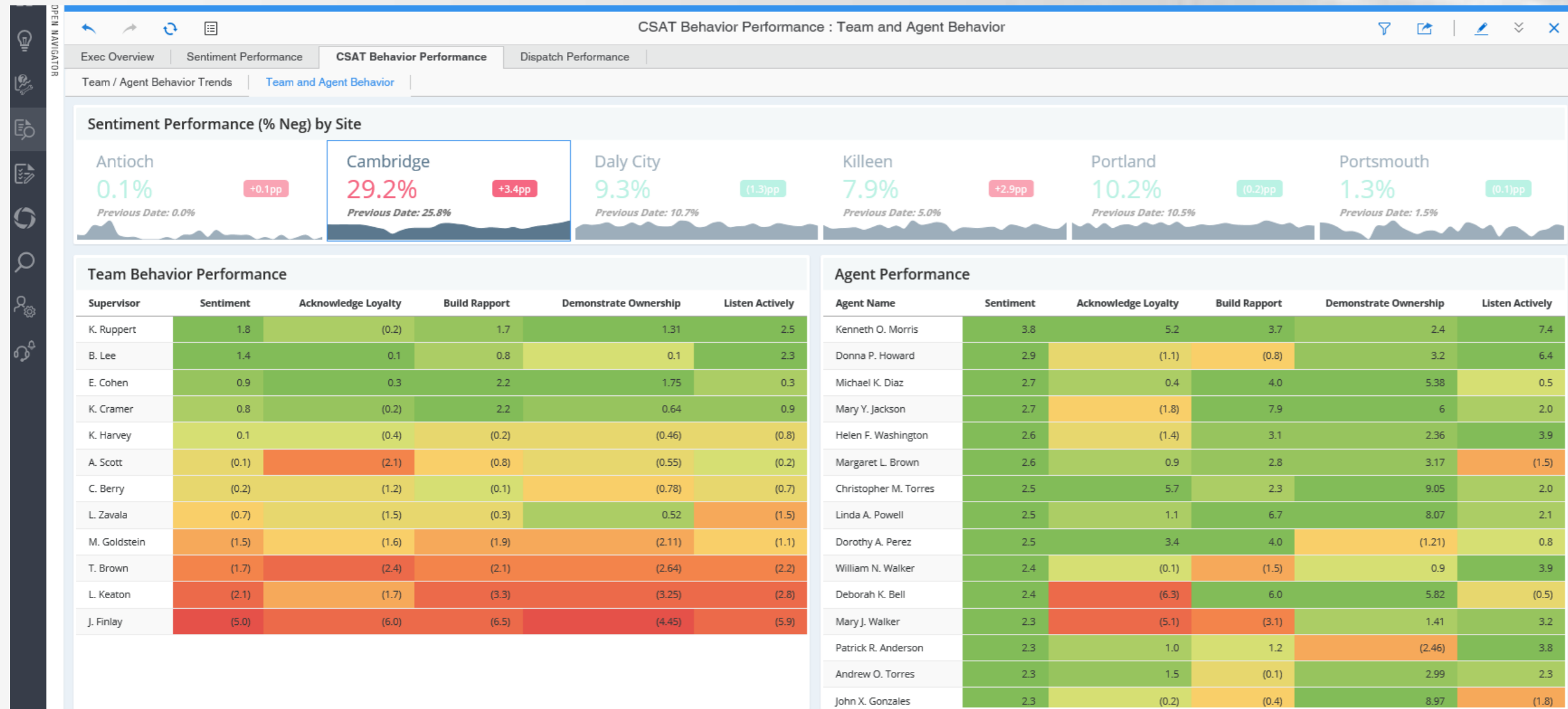
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Progression of Quality Management

INFLUENCE

Organizational Focus

TRANSFORMATIONAL QUALITY

- Do you have organization buy in?
- Do people trust the process and direction?
- Can you assess and articulate an ROI to key stakeholders?
- Do you have the right infrastructure in place (steering committee) to support constant improvements?

Trend Focus

METRIC-DRIVEN QUALITY MONITORING

- Have you created an unbiased quality process?
- Are you considering a more representative sample for key metrics?
- Can you assess the program's effectiveness?
- How would you adjust and expand the program?

Transactional Focus

TARGETED QUALITY MONITORING

- Can you identify meaningful interactions in QM?
- Do you have a plan?
- Identify the stakeholders?

IMPACT

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POLL

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3 Key Areas for Customer & Employee Experience Success

Machine Learning/AI

AI Predictive and Interpretive Models

Auto-Scoring Agent Soft-Skill on all interactions

Interactions Analytics

Auto-Detection of Discrete Events on all interactions

Quality Management

Operationalize Results

Workflows, Evaluations, Coaching, Dashboards
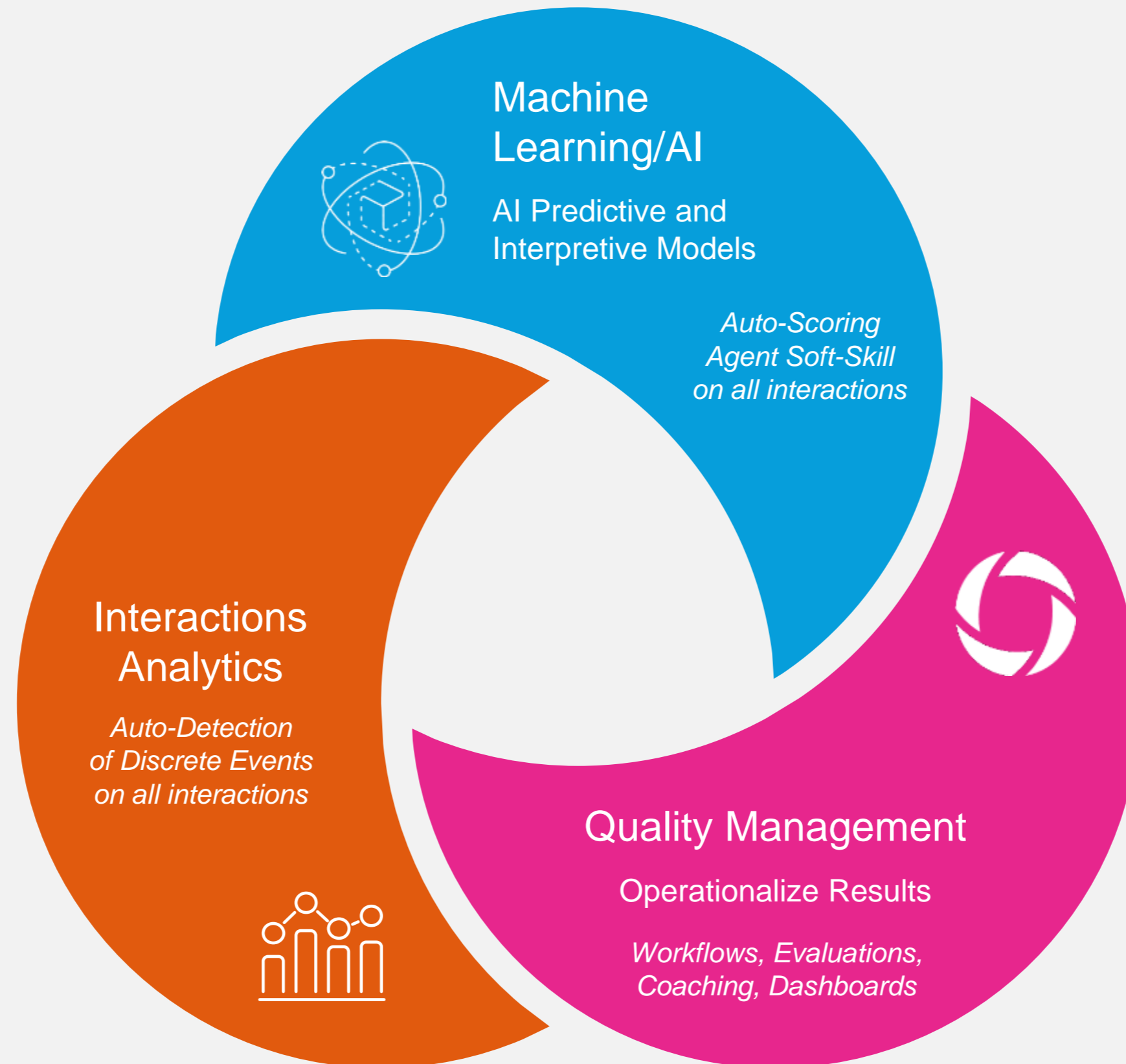
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THANK YOU

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Resources

Improving Home-based Agent Performance through Quality and Coaching Collaboration with a 5-Step Process.

The Future is Here Leveraging NICE ENLIGHTEN AI Behavioral Models to Improve Customer Satisfaction

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