

Intelligentics

Where *intelligence* meets *tactics*

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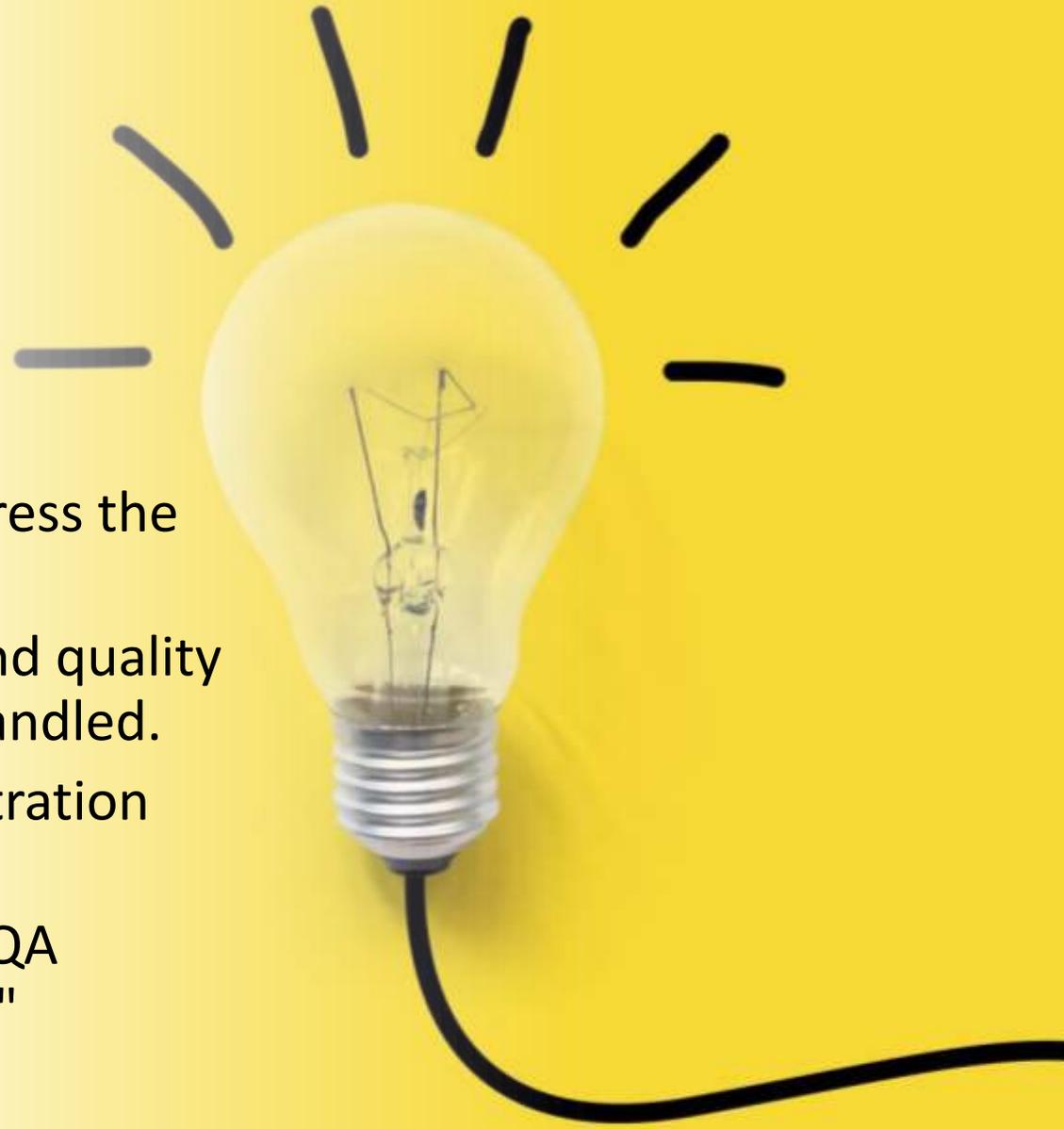
Quality Monitoring Special Assessments

Because "Normal" QA Doesn't Always Give You the Data You Need!



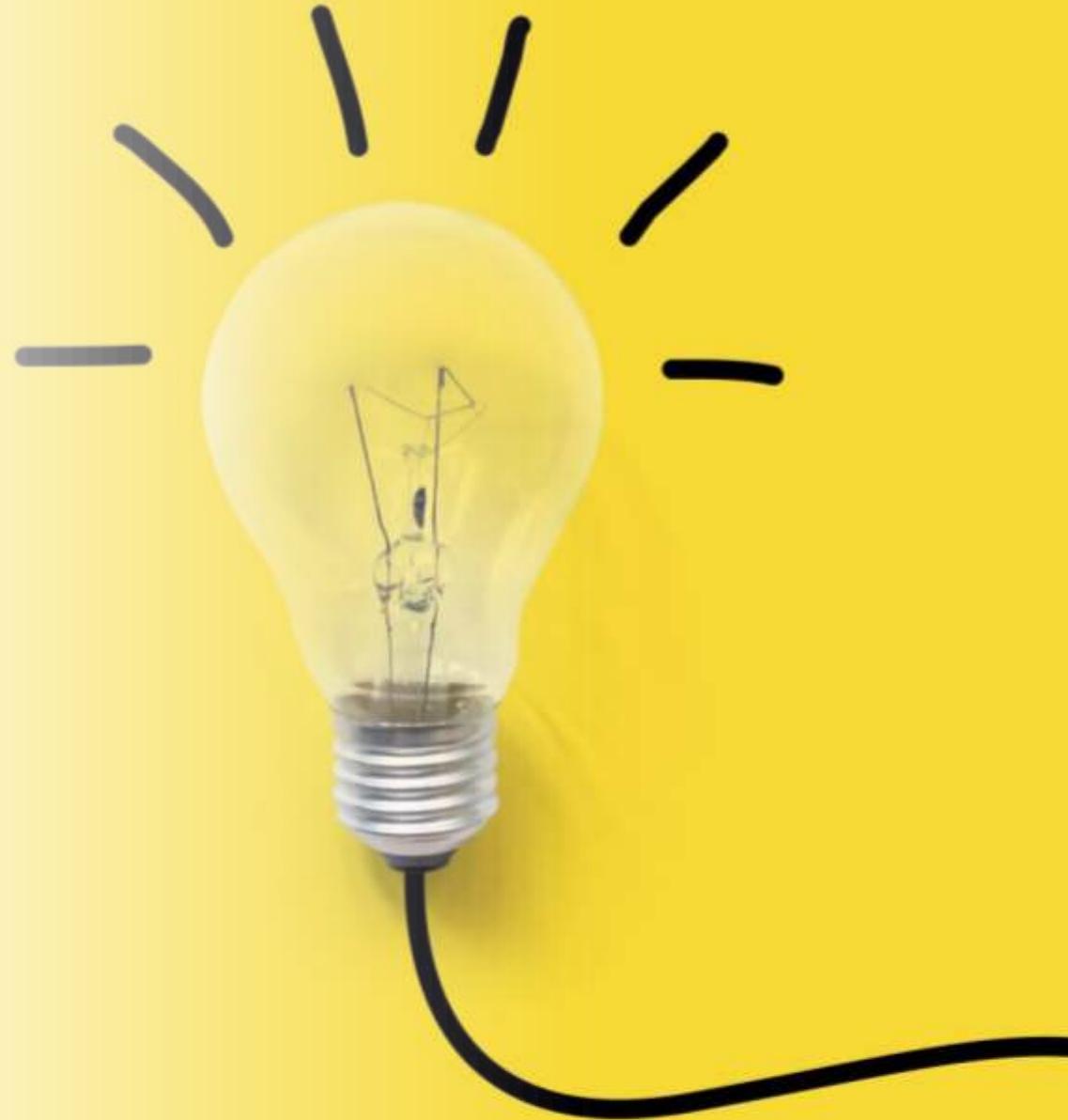
The Principle of “Rules & Exceptions”

- Customer Service processes and procedures address the most typical customer interactions.
- QA is designed to assess and drive consistency and quality with how those "general rule" interactions are handled.
- Customers and agents can experience acute frustration with situations that are "exceptions" to the rule.
- Don't try to assess "exceptional" situations with QA that was designed to deal with the "general rule." Instead, do a special assessment to address the exceptional situations.



Sure-Fire QA Techniques

- 3. Special Assessments
- 4. Secret Shopper Initiative



Special Assessments

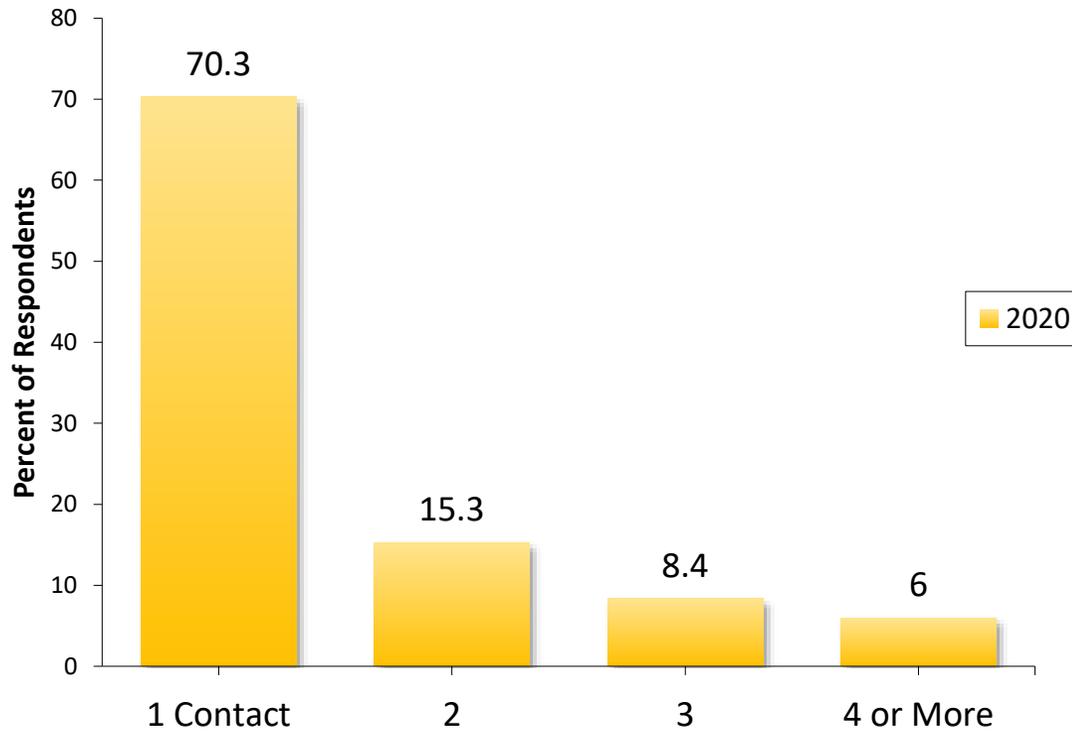
- Unresolved calls (requiring multiple contacts)



Resolution and Satisfaction

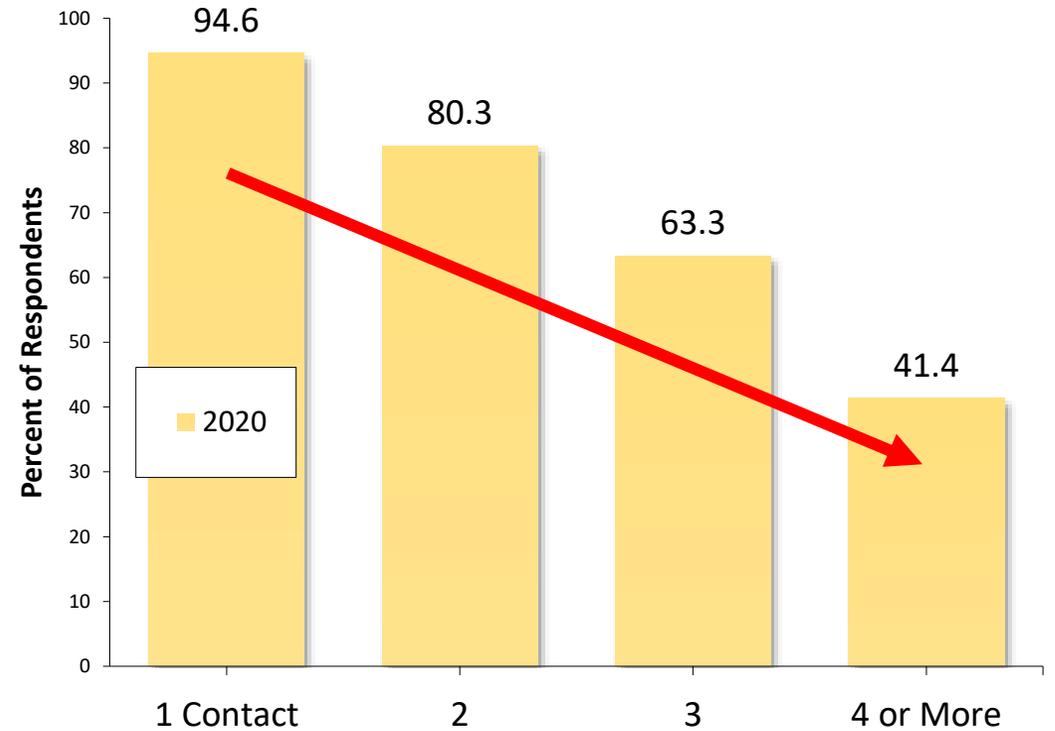
Number of Contacts to Resolve

Customer Service Callers 2020



Impact on Satisfaction

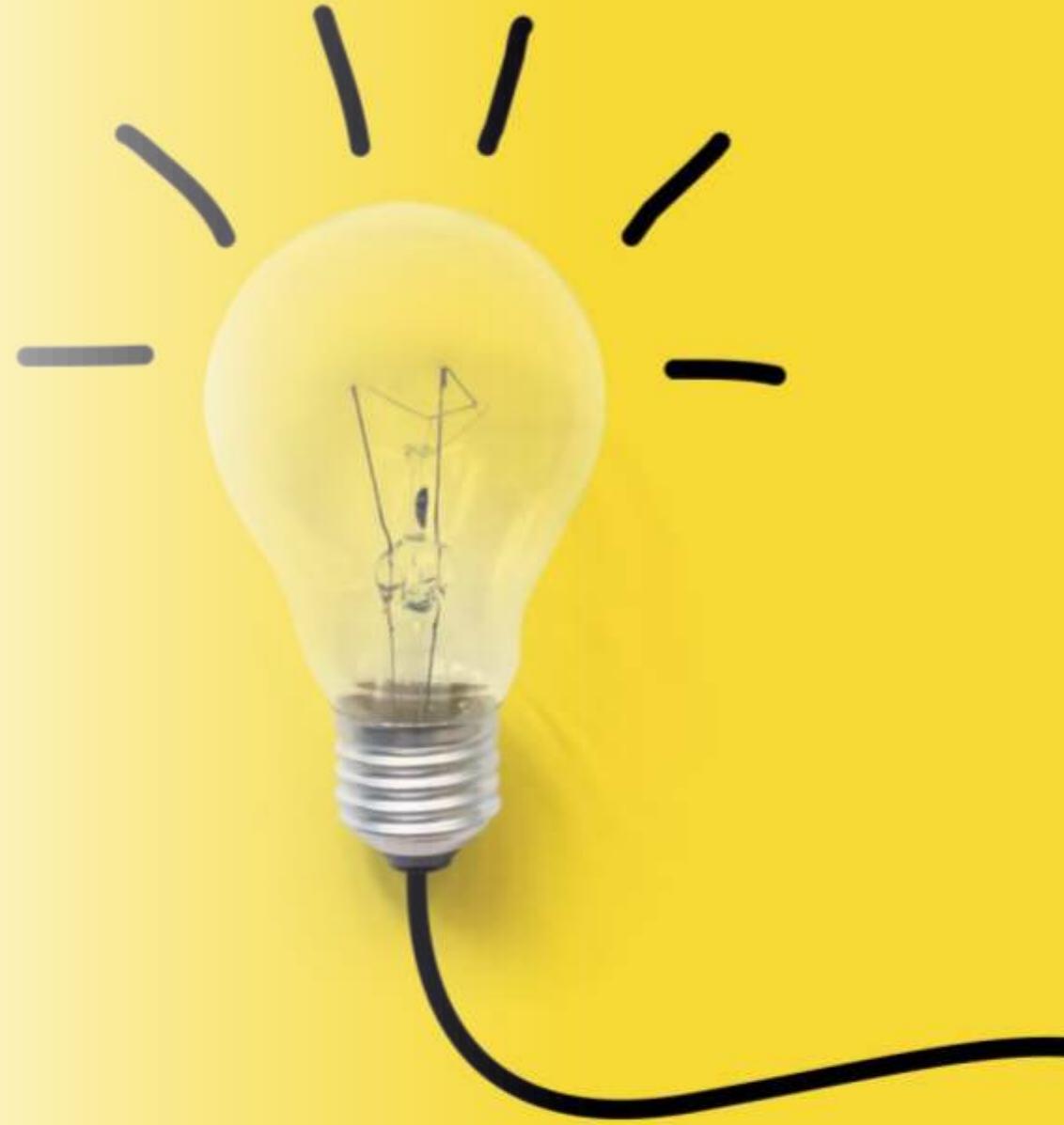
2020





Special Assessments

- Unresolved calls (requiring multiple contacts)
- QA the customer's call centre "journey"
 - Finding phone number
 - After-hours messages and options
 - Navigating the IVR (ease & experience)
 - Being on hold (experience & options)
 - Follow-up correspondence



Special QA Projects

- Unresolved calls (requiring multiple contacts)
- QA the customer's call centre journey
- “Outlier” calls
 - Escalated customers
 - Exceptionally long/short
 - Long or multiple holds
 - Transfers in/out



Special QA Projects

- Unresolved calls (requiring multiple contacts)
- QA the customer's call centre journey
- “Outlier” calls
- Specific procedural scenarios
 - Compliance, regulatory, and security issues
 - Handling special or exceptional procedures
 - Transferring to correct person/department





Special QA Projects

- Unresolved calls (requiring multiple contacts)
- QA the customer's call centre journey
- “Outlier” calls
- Specific procedural scenarios
- Departments outside of Customer Support



Secret Shopper Model

- Create dummy customer accounts in your system
- Determine a scenario driving
 - customer dissatisfaction
 - Lack of resolution
 - Inconsistent handling
- Randomly “place” calls as the “customer”
- Assess the calls on equal criteria
- Utilize outcomes to address the underlying issues



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