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Quality Management in the Contact Center

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Foundations for Developing a Quality Management Program

Foundations for Developing a Quality Management Program

The contact center is a high stakes environment and, as such, it's important to develop a quality management program that sets a confident foundation for measuring customer experience efficiency and managing employee productivity.

These are the most important steps in developing a quality management program:

1. **Identify your goals and objectives for the program**
   These often include agent improvement, consistency, process improvement, identifying training needs, and providing the basis for coaching.

2. **Determine program requirements**
   Include the types of monitoring you will use (record and review, silent, side-by-side, etc.), how representatives will be monitored, what systems and technologies are required, and how results will be used.

3. **Create standards for performance**
   Standards may be divided into base requirements (behaviors that represent the minimum acceptable level of performance) and those that can be continually refined and improved.

4. **Create the rating system**
   The scoring system should include forms, criteria, and a scoring approach. Important components include records of each monitored contact, standards of performance, basic identification information (agent name, call ID, date, and time), notes for observations, checklists, and the rating system.

5. **Develop an ongoing calibration process**
   This helps ensure that supervisors, quality analysts or others who do the monitoring rate agent interactions consistently and fairly.

6. **Develop an approach for coaching**
   Your coaching approach involves deciding who will have responsibility for coaching activities (generally, the individual who monitors the interaction provides coaching and feedback), identifying standards for coaching, and anticipating when coaching will happen and how it will be scheduled.

7. **Communicate program details to employees**
   Inform them of the purpose of monitoring, how it will be conducted, and how results will be used. Provide written monitoring policies, the criteria on which they will be monitored, and applicable forms and scorecards.

How-To Guide for Calculating the ROI of Training & Coaching

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In order to assess the effectiveness of training and coaching, we must utilize a thorough and systematic evaluation process. This evaluation process can be divided into three fundamental steps.

They are:

1. **Define the objectives of the training or coaching program**
2. **Specify each objective into a measurable item**
3. **Assess to which extent the learners have mastered the objectives**

A successful evaluation will provide us with insight on the effectiveness of the training or coaching program, indicators on whether to change, stop, or expand the program, and ways to improve the program for future delivery. To ensure a holistic perspective and well-rounded insight, these evaluations should occur on four levels.

The four levels are:

Level 1: Reaction

Level 2: Learning Evaluation

Level 3: Application to the job (or Transfer)

Level 4: Evaluating the impact and ROI (or Results)

At the first level, we should capturing data throughout, or at the very least, conclusion of, training or coaching on how attendees found value in areas such as program methodology, exercises, quality of materials and support resources, trainer or coaches knowledge and capabilities, facilities, overall strengths and opportunities, etc. A critical component to higher completion rates and validity of data is to schedule the survey as close to the completion of the coaching or training as possible. Another recommended best practice is to keep the survey in the same format or channel of the training or coaching. For example, if a student is completing an e-learning module, the survey should be built into the framework of the e-learning system.

Level two is the process of collecting, analyzing, and reporting information to determine both how much the participants learned and how that knowledge was applied during the experience. Through the insight collected at this level, we can begin to make determinations on how effective the trainer or coach is at facilitating the content and subsequent discussions, whether or not the content, sequence, and priority or emphasis is appropriate, and whether or not the exercises and methods reinforce key concepts and allow for practice and application.

How-To Guide for Calculating the ROI of Training & Coaching

The third level of evaluation is to assess the degree to while the knowledge, skills, and abilities taught through coaching or training are being used on the job. This is commonly referred to as knowledge transfer. During this level of evaluation, you identify the enablers and barriers that facilitate or inhibit successful application. The three types of barriers that you will encounter are situational (time, money, other responsibilities), institutional (established practices, limited offerings, inconvenient times and locations), and dispositional (attitudes, opinions, perceptions). By identifying these barriers, we can determine if there needs to be a change in the content, instructional/learning strategies, delivery method, or whether the training should even continue. In addition, this level of evaluation allows us to identify what changes may need to occur in the systems and support tools that are available.

A level four evaluation is the process in which we determine the impact of training on organizational productivity, improved customer satisfaction, and the organization's strategic business plan. There are two aspects to a level four evaluation:

Impact: What is the change in business metrics attributable to coaching or training?

ROI: What is the return on the investment (calculated by dividing the net dollar value of the benefit by the costs of training)?

Measure Benefit(s): Employee Retention

The cost of a training session is $5,000.

Pre-Training Employee Retention: 95% (5% turnover)
Post-Training Employee Retention: 98% (2% turnover)

Assuming 65 employees, turnover before training was 3.25 employees year (65 x 5%)

Turnover after training was 1.3 employees year (65 x 2%)

The difference is 3.25 – 1.3 = 1.95

Assuming all else was equal, it could be derived that an additional 1.95 employees stayed with the organization as result of training.

If the average employee earnings before overtime are $45,000 and the average cost of employee turnover cited in The Wall Street Journal is 50% of the employee's annual salary, the dollar value of one lost employee is $45,000 x 50% = $22,500

The dollar value of the retention improvements is
1.95 x $22,500 = $43,875

To calculate the benefit to cost ratio and ROI:
    $43,875 / $5000 = $8.78 Benefit to Cost Ratio
    $43,875 - $5,000 = $38,875 Return on Investment

Whether the return on coaching or training is improved customer satisfaction, increased conversion rates, or improved process efficiency, the key is to have a comprehensive evaluation process that provides you with quality insights, actionable improvements, and a clear understanding of the benefits of the program. By using this evaluation process, you are ensuring a program that is not only effective, but also driving value to the greater organization. When you're able to accomplish this, coaching or training is no longer a consumer of valuable time and money, but rather a generator of value and sustainable improvement.

SAFE – A Coaching Framework

SAFE – A Coaching Framework

Coaching presents rich opportunities for developing and motivating staff. After interactions have been monitored, coaching should be provided in a timely manner. A coaching session may be used to offer praise so that behavior continues, to provide instruction on how to improve undesirable behavior, or to give the agent an opportunity to practice behavior that may be especially difficult for them to master. Using a structured approach or model provides coaches with the necessary guidelines for delivering effective, consistent feedback to agents.

Although there are many effective models available, ICMI has developed the SAFE model.

Step 1) Summarize one to two observed behaviors and consequences

This first step involves selecting one or two behaviors on which to focus the coaching session. Trying to coach on too many skills at once can overwhelm the agent with too much to try to improve or continue. Since coaching sessions should happen frequently, there will be time to cover other

Summarize observed behavior(s)

Ask for input

Formulate a plan

Express thanks

behaviors at a later date. Be sure to explain the behavior and the consequences of that behavior in specific and objective terms. It is a good practice to use actual quotes from the monitored call to help the agent understand the skill they need to improve or the behavior they did well.

Step 2) Ask for input, if necessary.

This step can be helpful in some situations, but is not always necessary. While a coach never wants to discourage agent input, coaching should include quick reminders and frequent praise, which may not allow time for a two-way discussion with the agent. However, two-way collaboration is necessary when an undesirable behavior is persistent or has not shown improvement over several prior coaching sessions. The coach should use questions that clarify the agent's understanding of the desired behavior, test the agent's desire to improve, and allow the agent time to practice the required skill.

SAFE – A Coaching Framework

Step 3) Formulate plan of action and desired consequences

Once the positive or negative behavior has been identified and clarified, it is the coach's job to suggest ways to change undesirable behavior or to offer encouragement to continue desired behavior. The suggested actions should be specific and measurable, and the coach must ensure the agent has the tools necessary to implement the ideas. If the suggestions include practicing a certain skill, it may be helpful for the coach to model the desired behavior or provide the agent with the opportunity to practice while the coach is present.

The coach should also communicate the benefit of changing negative behavior or continuing positive behavior. It should not be assumed that the agent knows this connection without explanation. Since it is the agent's job to focus on his/her specific task at hand, he/she may not realize how a procedure or process may affect overall call center objectives. Communicating the reasons why the behavior needs to be changed or continued will increase agent buy-in to the plan of action.

Role plays or practicing with the rep during the coaching session is the best way to verify if the rep understands what you're asking him to do and how to do it. This may overlap with the (A), but in cases of a recent performance deficiency (or even a recent improvement) it is beneficial to quickly answer the question, "does this representative understand what I am asking them to do?"

Step 4) Express gratitude

Finally, close the coaching session with an expression of gratitude. Whether the agent is struggling to meet expectations or is exceeding expectations continually, it is important to communicate appreciation for his/her time, reflection, effort and attention. This step conveys sincerity and encouragement to the agent, and reinforces the important role of the agent in the contact center.

Summarize observed behaviors

Ask for input

Formulate a plan

Express thanks

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Tips for Developing a
Peer Mentor Program

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Peer mentorships are a valuable way of enriching your quality management program.

There are several advantages to a peer mentor program that should also be weighed with the inherent disadvantages.

The advantages of peer mentoring include:

Involves agents in the quality management program.

Reduces resistance and fear of quality management when the mentoring is performed by a "friendly face".

Supports an environment of empowerment and job enrichment.

Agents taking on mentoring responsibilities enable supervisors and managers to focus their time and efforts on other aspects of quality management.

The disadvantages of peer mentoring include:

Management must carefully select mentors or the agents may be passing on poor skills or behaviors.

Peer mentors must be trained in giving feedback.

It can take time away from the top performer's work with customers.

Your recognition/reward system must be aligned to support the peer mentor program.

Here are some tips to developing a peer mentor program in your contact center.

- Leverage technology to keep the mentoring program organized and a cohesive part of your entire quality management program.

- Expect a peer mentoring program to take some time in order for it to be effective. Don't fall into the trap of adding mentoring as a responsibility to a person or team that is already understaffed and unable to complete their existing workload.

- Selecting the right mentors and mentees is critical to the success of the program. When determining who will be mentors, consider both their ability and motivation in conjunction with the goals and objectives of your quality management program.

- When matching mentors with mentees, look at the professional goals and interests of each individual. Mentors and mentees should share common values, goals and interests.

- Set SMART goals for the mentors and mentees to work towards.

- (Specific Measurable Achievable Relevant Time bound)

Insider Advice:
The Enterprise-Wide
Strategic Value of QM

Insider Advice:
The Enterprise-Wide Strategic Value of QM

Quality management is fundamental to maintaining and improving agent performance, identifying training gaps and customer needs, and evaluating the level of customer satisfaction. That's obvious within the four walls of the contact center, but what's the opportunity from there?

There is often a conflict within organizations between the desire for an organization (and those who run it) to look good and the need to learn what is going wrong. Designing a quality management program that consistently yields positive results may make the organization feel good, but likely will fail to provide information that could be valuable to the organization. The enterprise-wide strategic value of quality management occurs when it goes beyond effectively reinforcing positive behaviors and introducing new behaviors in the contact center and provides customer insights and business intelligence to other units of the organization.

8x8's Max Ball, a long time contact center insider, provides this additional advice on gaining the maximum value from a quality management program.

Building out the review sheet - Start with the end in mind: Step 1 is to define the goals of your agent Quality Management program. What behaviors are you most concerned about improving and what performance goals are most important to you.

For example:

- **Reduced call durations** – emphasize places where the customer interaction is not adding value but is adding time

- **Improve customer relationships** – Are agents greeting customers by name, are they doing things to build relationships with the customer.

- **Increase sales** – Focus on closing, positioning and properly identifying the customer's need

K.I.S.S: When you build out your review sheet it's so easy to fall into the trap of covering every detail of every call, and with a web-based review tool there is nothing to stop you from adding every question you can think of. Remember, all questions will be reviewed many times over, taking time day after day after day. Make sure every question counts, and make sure your feedback is always actionable. As Mark Twain famously said "I'm sorry, I did not have time to write a shorter letter" it takes time to ask only the questions you need – spend the time up front to be as succinct as possible but be willing to make changes after you have used the form for a while.

Small changes make big impacts: It's good to iterate your forms, just beware that a small change to a form can have significant impact on the scores people receive. Be sure to iterate your review sheets so you don't score two agents on the same scale against different forms.

Insider Advice:
The Enterprise-Wide Strategic Value of QM

You have a great training tool: One of the best and most powerful uses for a Quality Management tool is to provide training. Look for great calls from your best agents and make those available to new agents so they can watch and listen to those calls – that simple approach sped up the ramp up time of new agents by 20% for one of our customers. Find some good calls and take advantage of this powerful training tool.

Think 360 degrees: Proper Quality Management tools will allow agents to self evaluate calls. This can be a powerful tool to allow agents to walk a mile in their supervisor's shoes and better understand the impact of their actions on their customers and their organization. Have additional people beyond the supervisors and reviewers review a few calls and provide notes on things that were great or things that were lacking. I'm not suggesting every call becomes an open platform for everyone in the organization to opine on the agent's performance but opening up occasional calls to the agent and to others in the organization can open an agent's eyes up to aspects of their performance that standard reviews repeated over and over will not provide.

About ICMI & 8x8

About ICMI

The International Customer Management Institute (ICMI) is the leading global provider of comprehensive resources for customer management professionals -- from frontline agents to executives-- who wish to improve customer experiences and increase efficiencies at every level of the contact center. Since 1985, ICMI has helped more than 50,000 organizations in 167 countries through training, events, consulting, and informational resources. ICMI's experienced and dedicated team of industry insiders, trainers, and consultants are committed to helping you raise the strategic value of your contact center, optimize your operations and improve your customer service.

About 8x8

8x8, Inc. is the global leader in cloud communications and has transformed more than 47,000 businesses in over 100 countries. 8x8's Enterprise Communications as-a-Service solution delivers a powerful continuous communications experience from desktop to mobile, and enables companies of all sizes to solve critical business challenges and modernize their communications. 8x8 delivers world-class phone service, contact center solutions, conferencing, collaboration and advanced business analytics. With corporate headquarters in Silicon Valley, 8x8 has built a global footprint with offices and data centers worldwide, including the U.S., U.K., Canada, Romania, Hong Kong and Australia. Visit us at www.8x8.com or connect with 8x8 on LinkedIn, Facebook, Twitter and Google+.