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Quality Monitoring in a Contact Center

Making Sure Your Contact Center Works for Your Business

About Authors

Matt Rocco

Matt Rocco is the President for Etech Global Services. He also serves as President & COO of PRWTech, LLC.

Matt is a 32 year veteran of the call center / BPO industry. He has held key leadership positions within Dun & Bradstreet, The Berry Company (a subsidiary of Bell South), Etech, Inc. and Etech Global Services. Matt has spoken at many industry events and has been featured in articles in numerous periodicals including CIO Review, Call Center Magazine, Call Center Times, Connections Magazines and others.

Matt started as a telephone rep for D&B in 1984 and now serves as President of Etech Global Services. In the past 31 years, he has spent time in every facet of call center operations and outsourcing processes.

Since 2003, he has been the President of Etech's operating companies, a multi-national outsourcing organization with over 2,700 employees that provides world class solutions to Fortune 500 companies from its locations in the US, India and Jamaica. Under Matt's leadership, Etech has received numerous industry and community awards including: 20 Most Promising Quality Monitoring Solutions Provider – CIO Review, Professional Association of Customer Engagement (PACE) – Technovation Award, PACE – Corporate Citizen Award (4 times), GESIA – Best Call Center / BPO Award, Top 50 Minority Owned Businesses – Diversity.com, US Chamber of Commerce – Corporate Citizenship Award and many others.

Matt is an alumnus of Dickinson College in Carlisle, PA where he lettered in both basketball and baseball serving as captain of the basketball team his senior year. He graduated from Dickinson with a BA in Economics. He has also completed the Master Certificate program in Executive Leadership from Cornell University.

In addition to his responsibility at Etech, Matt has served on the board of the Nacogdoches County Chamber of Commerce, the United Way of Nacogdoches County, the Nacogdoches Dragon Athletic Booster Club, Melita International User Group, License Plates of Texas, LLC., PRWTech, LLC, the Pineywoods Youth Football Association and the Glory Gang Ministry, a Christian service organization that is dedicated to assisting and teaching disadvantaged youth.

In May of 2010, Matt was elected by the citizens of Nacogdoches, TX to serve on the Nacogdoches Independent School District Board of Trustees. During his 3 year term, Matt served as president and vice-president for the Board of Trustees.

Matt is married to his college sweetheart, April. They have raised five children - Nick, Matthew, Jermaine, Jamaal and Lexie.

Jim Iyoob

Jim is the Chief Customer Officer for Etech Global Services. Jim has responsibility for Etech's strategy, marketing, business development, IT, program implementation, operational excellence and product development across all of Etech's existing lines of business – Etech, Etech Monitoring Solutions (EMS), Etech Technology Solutions (ETS), and Etech Social Media Solutions.

He is passionate, driven, and an energetic business leader with a strong desire to remain ahead of the curve in outsourcing solutions and service delivery.

Jim has 25+ years of contact center outsourcing experience in inbound, outbound, chat operations, and social media management spanning across the globe; domestic, nearshore, and offshore. His expertise includes operational performance management, e-commerce sales and service with an impeccable track record of innovation and advanced business intelligence. One of his strongest suits is being able to assist customers in launching and developing their live chat operations into a world-class customer experience solution.

Jim has an exceptional understanding of the customers' products, their requirements & processes, and a complete analysis in order to provide the right kind of solution. This has helped him develop, implement, and retain some of the most successful, award winning outsourcing solutions that deliver consistent ROI. Due to his level of expertise, Jim has been featured in numerous publications including CIO Review, Contact Center Pipeline, Connections Magazine, and was also listed as one of the 'Top 20 Influential People to Follow' on Twitter by "Iwantitnow".

The gained experience over the past 25+ years has enabled him to be a subject matter expert for call center solutions.

In addition to his responsibility at Etech, Jim likes to spend his spare time volunteering for various charitable organizations including the Nacogdoches County Chamber of Commerce, the United Way of Nacogdoches County, Boys and Girls Club of East Texas, and the Glory Gang Ministry, a Christian service organization that is dedicated to assisting and teaching disadvantaged youth.

Jim is married to his darling wife, Kelci. They have raised three children – Michael, Brianna, and Kylee.

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What is Quality Monitoring in a Contact Center?

What is "contact center quality monitoring"? Just stop and focus on the two parts of this phrase "contact center" and "quality monitoring" and it starts to make sense. If your business relies on a contact center, you need to make sure the quality of service provided is up to your standards. Your reputation and your business are literally on the line here monitoring the effectiveness of customer contacts is a must.

In a formalized Quality Monitoring System, agent interactions with customers are tracked and reviewed for effectiveness. This can be done in-person with a monitor literally working alongside an agent. It can also be done in real time via automatic call distributors that allow monitors to access calls in progress without having to physically be with agents. Transactions can also be recorded and reviewed at a later time. Calls, emails and chats can all be tracked and monitored.

Monitor and evaluate calls, emails and chats with help of Quality Monitoring.

Each method of monitoring agent calls has its own set of pros and cons but the point remains the same tracking contact center activity gives managers a window into how well company policies are followed and how effective and appropriate those policies and other procedures may be ineffectively serving customers.

Monitoring both in-person and anonymously can often be an effective way to go. In-person tracking allows supervisors to intervene as necessary at the moment that a customer has an issue and head problems off at the pass. Anonymous tracking, whether real time or recorded, gives managers a more accurate view of how agents perform. When a boss is sitting next to them, agents are likely to be extra attentive to details. Seeing how agents perform without that is important. Reviewing recorded interactions also offers the ability to stop and playback certain elements of calls to glean additional information.

The Need for a Quality Monitoring System

If asked right now how well your contact center is performing currently, what would you say? If your answer would be any form of "I don't know", you're not alone. If your answer is a resounding "fabulous", how can you back that up? If you can't, you're also not alone.

Relying on hunches or anecdotal data to gauge the effectiveness of your contact center opens your business up for potentially serious problems down the road. The problems can extend far beyond an individual customer's experience and move into the realm of reputation management quickly. All that needs to happen is for one disgruntled customer to get onto social media to vent and, well, the reputation slander snowball begins.

Your contact center does more than simply funnel calls and process tasks.

Many things work together to make up the overall quality of a customer experience. At a minimum, these include:

▸ The politeness and professionalism of the agent

▸ The resolution achieved

▸ The time required to reach a resolution (including time waiting for a call to be answered as well as time required to complete a call)

▸ The simplicity of getting help

When even just one of these things does not meet or exceed a customer's expectation, you could be in trouble. This trouble does not always mean your staff did something wrong either. It may mean that something in your process or system isn't working well. You won't know where the problem lies or even know that you have a problem unless you have an effective quality monitoring system in place.

Understanding clearly the experiences that your customers have when engaging with your contact center is essential. These experiences can directly play into the marketing and branding efforts of your business.

Your contact center does more than simply funnel calls and process tasks. Consider the following results that a high performing contact center can achieve or contribute to:

▸ Improved customer satisfaction and retention

▸ Cost savings from more efficient call handling

▸ Increased number of cross-sells and upsells

▸ Reduced employee turnover due to improved training and overall job satisfaction

▸ Better adherence to company policies

Quality assurance programs for contact centers directly impacts your ultimate bottom line. Equip your staff with the tools and support they need and they will be happier and more productive. And, having happier employees generally translates into having happier customers.

Defining Quality for Contact Centers

Understanding the various business outcomes that your contact center can impact gives you a clear start on identifying your quality criteria for a monitoring system. You will need to define clear and measurable parameters that you can review and provide reporting and feedback on. There are four main areas that you can divide your quality monitoring criteria into, as follows:

1. Call Handling Logistics

In this category, you should track things that directly correlate to the efficiency of any interactions, such as:

▸ Time spent on hold

▸ Total duration of a call

▸ Number of times a call was transferred

▸ Number of calls or interactions required to reach resolution

▸ Any change in the medium used (e.g. a chat that is moved to a phone call for better handling)

These items are generally some of the most important to customers and register top of mind when they consider their level of satisfaction once an interaction has been completed.

2. Business Outcomes

In this category, you should track things that directly relate to the financial results your company may see from any interaction, such as:

▸ The number and revenue of upsells or cross-sells

▸ Returns for refunds only

▸ Returns for exchanges

▸ Additional costs potentially borne by the company (e.g. shipping to or from a customer)

In addition to seeing the direct financial impact of each interaction, you can glean information about the customer's satisfaction by noting whether items were simply returned or exchanged and whether or not additional sales took place due to the agent's handling of the call.

3. Company Processes

In this category, you should track things that illustrate the effectiveness of your policies and how well your agents know and follow those policies, such as:

▸ Number of times a call was put on hold for an agent to research a policy

▸ Number of times a policy was not followed

▸ Actions taken in lieu of proper policies

▸ Incorrect information provided to customers (especially that which may open up liability issues)

These items can highlight gaps in your current agent training program (if the same issue is found with multiple agents), concerns about specific agents' performance and knowledge or opportunities for your company to revise or otherwise improve policies or procedures.

4. Market Intelligence

In this category, you should track things that provide insight into what your competitors are doing or other shifts in the marketplace, such as:

▸ Requests for specific products or services

▸ Mentions of what a competitor offers, including pricing

▸ Comparisons of your product or service to a competitor's

▸ Terms or phrases used to describe your offering or company

These items can help you understand how your company and your offering is viewed from the outside and maybe even showcase opportunities for improvement or competitive advantage.
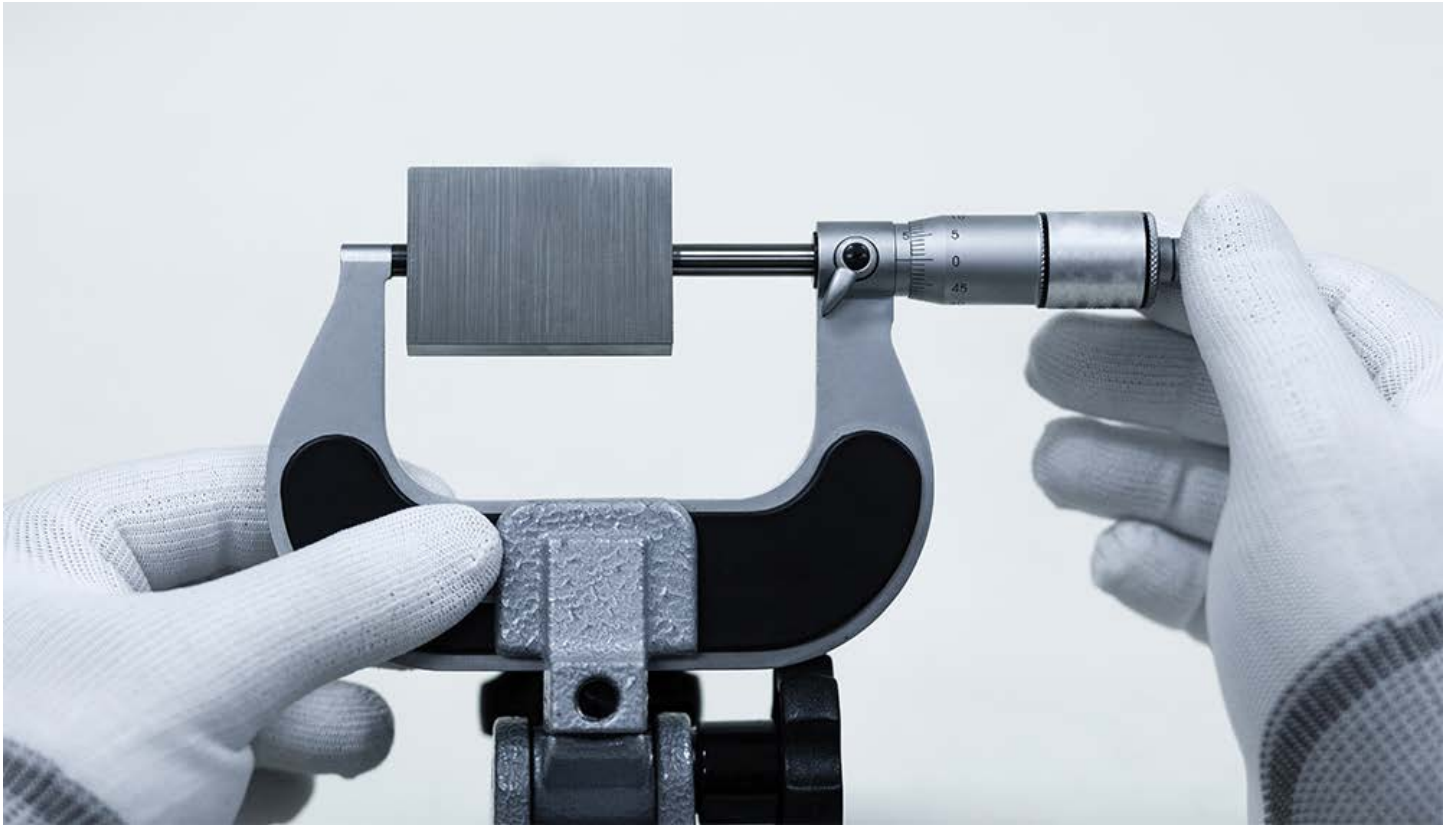
Monitoring Criteria & Guidelines

Clearly, your contact center plays a vital role in the health of your business and therefore, effective monitoring is equally vital. Knowing the potential benefits that strong customer contact center interactions can create, you can go to the next step and outline the criteria by which you will measure interactions. These should be complied into a standardized quality evaluation form, used for every interaction. Doing this allows for objective measurement and comparison that yields data based on which you can make important business decisions.

In identifying your quality monitoring criteria, the first thing you should do is determine what things you want to track. You can break sections out to match the potential business results listed in the previous chapter. For example, you could have questions that align with the call handling logistics, with the business outcomes, with the company processes and with market intelligence. The latter category will have less to do with measuring the effectiveness of your agents as it will your potential opportunities but it is nonetheless important.

Each question on your evaluation form should be individually measurable and tied directly to one of the key areas noted above. You must also identify the means by which you will measure each item. Some will be obvious such as the amount of time a person spent on hold or how many times a call was transferred. Other questions may be more subjective like, "Did the agent show concern for the customer's needs?" Document the means by which each criteria shall be measured and ensure that is used consistently for all calls and all agents.

Because some criteria will be more important than others, you may wish to assign points to each. Some questions can be worth one point while others may be worth two or three points. This allows you to capture a range of information without unnecessarily skewing the overall results. Anyone involved in the quality monitoring system should be properly trained on how to measure each item.

The How & Why of Calibration

Calibrating your call monitoring is as vital to the success of your program as is establishing your monitoring criteria. It is only with a clear calibration process that you can ensure the consistent implementation of your program and that a consistent experience is delivered to customers.

Calibration need not be an onerous task, especially once your program is well established but it does need to be an ongoing component of it. In the beginning, you should plan to hold calibration meetings every week. Eventually you can phase these out to once a month. Following is a recommended agenda for such meetings:

1. **Baseline Rating**
   Every person present should be allowed to rate each call at the outset without input from anyone else. This provides great information for discussion going forward.

2. **Group Review**
   Participants should then discuss their individual reviews as a group. This will bring to the table any areas in which individual reviewers may see things differently and this is exactly why calibration is so important. You may find through these group discussions that your guidelines are interpreted differently by different reviewers. You can then address this in order to reduce or eliminate such issues in the future and, ultimately, improve the consistency of your program.

3. **Discuss Opportunities for Improvement**
   Through the calibration process, your team may identify program or process improvements that may be necessary, as noted above. The team may also identify coaching needs for your call center agents. Before closing out your calibration session, document the action items associated with each of these.

Armed with your action items, your team can go forward and make changes that should ideally improve the results you see in future calibration meetings.

Creating a Quality Monitoring Leadership Team

For any initiative to work or department to be truly effective for a company, there must be strong leadership and support from the top down. Your call center quality monitoring program is no exception to this rule. You should take great care in identifying appropriate leaders for your team. These people will be tasked with many things, including:

▸ Developing monitoring standards

▸ Running ongoing calibration meetings

▸ Receiving and processing escalations

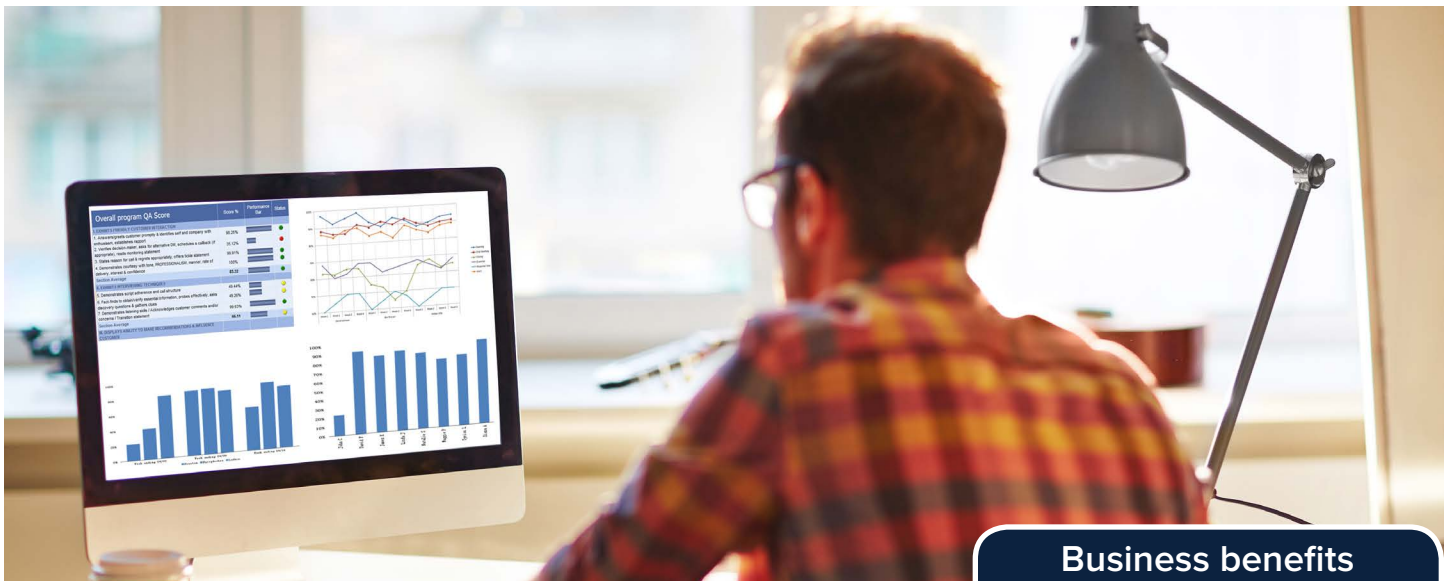▸ New hire and ongoing training

▸ Managing agent incentives and rewards

The number of people involved in your leadership team will vary in large part due to the size of your organization and the number of call center agents you have.

Especially at the outset, you may want to ensure that your leadership team includes people from within your company as well as some independent third party people. This allows you to establish a program that leverages the unique and beneficial insights from both ends.

Those who are familiar with your company, your offerings and your customers will have invaluable knowledge about what your customers really want and need. They will also be able to give feedback on what has been done before, what worked, what didn't and why. External consultants or advisors can bring fresh viewpoints to the table that may well be worth their weight in gold. The ability to learn from others' experiences is something that should never be disregarded. Blending these two together is virtual nirvana.

You may eventually need to only keep your internal people on your leadership team but you can always have external advisors available for consultation as needed. This should be possible once you have solidified an implementation roadmap that shows the timing and flow of when you will have all elements in place.

Developing a Customer Driven Monitoring System

Before going any further with a contact center quality monitoring system, a discussion about the importance of your customers and their experiences is warranted. Certainly you want to reap some business benefits out of your monitoring program but those benefits, quite frankly, should be secondary to improving the overall customer experience. In fact, it could be said that any business benefits should really and simply be natural by-products of an improved customer experience.

> **Business benefits from quality monitoring system should really and simply be natural by-products of an improved customer experience.**

When not at work, you yourself are a consumer. Think about your experiences as such. What matters to you? Chances are, what matters to you as a customer matters to your customers as well. Your quality monitoring system could be thought of like a solar system with a picture of your customers in the middle. The number one reason to monitor and improve your contact center experiences is for the benefit of your customers.

Consider these statistics:

- 70% of consumer buying experiences are influenced by the customers' perceptions of how they are being treated by companies according to McKinsey.

- In 2010, 36% of companies consciously competed based upon customer experience. The 2015 Gartner Marketing Spending Survey indicated that by this year, that number would rise to 89%.

- Forrester Research reported that a price based value proposition is today far less impactful than customer experience.

If all of the above is not enough, Accenture explains that a poor customer experience is far and away the #1 reason that makes customers flee today. The ease of shopping online makes finding a particular product or price a no-brainer anymore. The only real way for companies to differentiate themselves then becomes experience.

So, how do you make sure that your quality monitoring system is centered around your customers? You must make sure that your questions on evaluation forms focus on the areas that most directly impact the customer experience. At a minimum, you must track the following:

- Hold or time by channel
- Abandonment rates by channel
- Number of interactions to resolution
- Speed to resolution
- Total volume of interactions by channel

In addition to these very objective measures, questions that point to any potential extraordinary nature of an interaction should be included. The goal of every customer interaction should always be to create a WOW experience. Your monitoring program should determine whether or not this is being done.

Happy consumers are good for business. Ruby Newell-Legner indicates that 70% of people will return to a business if their problems are appropriately solved.

On the flip side, frustrated consumers are bad for business. An Accenture Global Consumer Pulse Survey identifies some of the top frustrations among consumers today:

▸ 89% find it annoying when they have to tell their stories repeatedly to different agents.

▸ 90% get miffed when they spend long times on hold or waiting for help.

▸ 91% indicate dislike for having to reach out for help multiple times to get a problem solved.

Experiences like these do not represent the best that a company has to offer and customers take note of that. How are you representing your company?

That is the question that should lead your contact center quality monitoring system efforts.

When setting up a process by which you can monitor the effectiveness of your contact center, do not focus solely on agent performance (good or bad). First you must recognize how the company is putting itself forward to customers and how it can improve on that apart from contact center interactions. Then, when evaluating individual agent performance take the next step and look at how you can help that agent improve if that is what is needed. By doing this, you create a closed-loop system that is fully integrated and can become an essential business driver.

In thinking about how you represent your company to customers, you should also develop the principles upon which you want to build a customer experience program. What is your company's vision for how customers should be treated and how they should feel about doing business with you? Once you identify this, map out your plan to get there. Everything in your monitoring system should work to deliver the desired experience for each and every customer.

Linking Quality Monitoring & Training for Maximum Results

As noted in the previous chapter, a closed-loop system that integrates not only agent or call performance but training is the path to putting the full power of quality monitoring to work for your business. Certainly emphasis can and should be given to new hire training but the concept of training should not stop there.

Recitation of a vision or mission statement to a new employee is hardly the way to engrain critical concepts into the minds and acts of your agents. Remember that new employees are learning a myriad of other things during their onboarding process and they cannot be expected to remember every little detail. Reiteration will be essential and this is where company culture comes in.

> **A quality monitoring program that is truly customer focused will be an ongoing effort.**

When your customer experience vision is part of an overarching approach to business, employees in all departments including your contact center will have a much better chance of living that and creating the experiences you want your customers to have. A quality monitoring program that is truly customer focused will be an ongoing effort that looks something like this:

- ▶ Monitor
- ▶ Review
- ▶ Coach
- ▶ Monitor
- ▶ Review
- ▶ Coach

And so on. Over and over again.

There are two important points to take note of here. One is the continuous nature of the cycle. Monitoring contact center activities for only a short time is, well, short-sighted and will produce corresponding results. Not doing anything with the results of your monitoring completely negates any benefit you may get from monitoring. In fact, one could say that if you are not going to do anything with the results, there is no reason to monitor. Using data to revise processes or review them with agents is how your monitoring system can have meaning.

The second item to take note of here is the conscious use of the term "coach" instead of "train". Old-school "training" is often very passive and casts employees in a somewhat negative light. "Coaching", on the other hand, is a more positive approach that focuses on maximizing potential rather than just fixing problems. When you coach your employees, you can celebrate their successes as well as encouraging them and leading them to further successes.

In addition to communicating important procedural information, coaching offers another critical benefit - it empowers employees. Your agents will notice the different tone you take to "training" and good agents will respond positively. They will feel valued, they will feel like they matter and they will become your champions. This is perhaps one of the best ways to turn agents into creators of WOW for customers.

Realizing ROI from a Quality Monitoring System
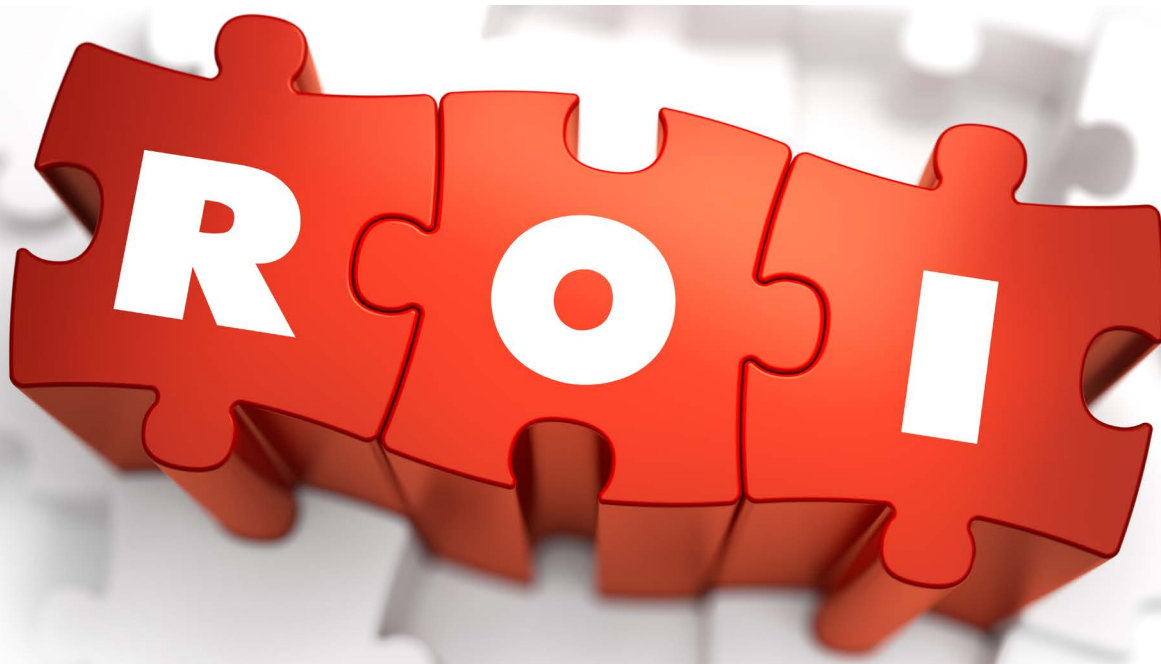
Perhaps one of the greatest concerns companies may have about call center quality monitoring programs is whether or not they are worth the investment. Done right, the results show that they are more than worth it. These programs can deliver documented return on investment in many ways.

Following are some of the benefits of a call center quality monitoring system that translate into actual ROI:

▸ **Reduced Agent Turnover**
When call center agents receive proper upfront and ongoing training and feedback, they feel more supported in their jobs. This support can directly impact their morale and satisfaction with their jobs and their employers. This helps them be set up to succeed, reducing the chance that they will leave to seek greener pastures.
Every time you lose an agent, you lose productivity. Remaining agents may need to pick up the slack and this burden can weigh heavily on them. It can even negatively impact their ability to provide the level of service you want them to provide and that they want to provide. The time and cost involved in recruiting, hiring and training new agents must also be factored in. Put all of these things together and it is easy to see the financial benefits of reducing agent turnover.

▸ **Improved Customer Satisfaction and Loyalty**
When agents are able to deliver better service, customers will be happier. That is a fact. It is also a fact that such satisfaction translates into loyalty which is invaluable for your business. Reduced call handling time, hold time and more positive outcomes are just some of the things that lead customers to be happier with their service interactions with your agents.

▸ **More Consistent Customer Service Experiences**
A good call center quality monitoring program will create a more consistent experience for customers. This also impacts satisfaction and loyalty. It also helps to reduce the number of costly errors that may be made by agents who do not have the right information about how to handle certain situations. Wrong decisions on the part of call center agents can cost companies dearly.

▸ **Fewer Call Escalations**
Well trained agents can take care of more situations, preventing many calls from needing supervisory involvement. This allows leadership team members to stay focused at a higher level and keep the program running well. Every time a manager has to get into the weeds and deal with an escalation, the cost of handling that call increases.

▸ **More Customers Served in Less Time**
As agents become more efficient in helping customers, they can assist more people in the same or less time than they once did. This may lead to a reduction in hold times or the ability of your team to handle a growing number of customers due to natural growth of your business. Either way, this is a clear financial advantage to a good call monitoring system.

10 Mistakes to Avoid When Designing a Quality Monitoring System

Embarking on the challenge of creating a quality monitoring system for your contact center is not easy. Around every corner lies another common mistake that all too many businesses have made. When creating your quality monitoring system, learn from others' mistakes and avoid making them yourself. The number of pitfalls you will want to avoid are numerous but our top 10 are listed here and can guide you on the path to contact center brilliance.

1. **Focusing on agent performance only**
   Taking this approach is missing much of the benefit that your quality monitoring system can deliver. It also puts an unfair level of responsibility on your agents.

2. **Not measuring your results as key business drivers**
   Your contact center is an integral part of your business. Its metrics should therefore be considered and reviewed in the context of overall business operations and success.

3. **Not starting with a vision focused on the customer experience**
   Customers and their experiences should be the reason that your company exists and therefore should be the reason you monitor the quality of your contact center.

4. **Not incorporating training as an essential program component**
   Reviewing metrics is great but if the results are not put back into the system, you will lose out on the opportunity to make important changes that could greatly benefit your business.

5. **Only training, not coaching**
   Developing the skill of your agents matters but adopting a coaching attitude lets you identify their wins as well as cultivate their future performance by showing them they and their work are important to the business.

6. **Not using metrics to evaluate market opportunities**
   Contact center interactions can give you invaluable customer data to mine. It offers a glimpse into how customers view and talk about your offerings and can help you more effectively compete in your market.

7. **Not using metrics to evaluate your business processes**
   The effectiveness or lack thereof of any customer interaction is not always due to agent performance. Your procedures or policies may actually hinder a good customer experience and your metrics can show these opportunities for improvement as well.

8. **Not monitoring all channels**
   If you deploy service via multiple channels but only monitor one, you will not receive accurate results and could end up making decisions that hurt you more than they help you.

9. **Not getting leadership support**
   From the top down, your quality monitoring system must be looked at as an important way of improving the customer experience and benefitting the bottom line.

10. **Not ensuring ongoing funding**
    The cost of a quality monitoring system should not be considered an extra or optional one, it should be built into your budget like the cost of hiring agents.

Putting It All Together

Winning with customer service is a multi-pronged thing. It takes the right agents, the right coaching, the right channels and the right data. If you have any sort of customer service, you should make monitoring and coaching standard elements of your service offering in order to truly excel and enjoy the competitive advantage you seek.

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