

A group of four business professionals in a modern office setting. A man with glasses and a beard is looking at a tablet held by a woman. Another woman with glasses is looking at the tablet, and a man with glasses is looking at the woman. The background is a brightly lit office with large windows and modern lighting.

How to Leverage Quality Management to Transform the Customer Experience



Introduction

When is the last time you took a step back and questioned the purpose and meaning of quality management (QM) in your contact center? Like many human activities that become routine and mundane, quality management can quickly devolve into a necessary evil—just another process that stands between the overworked contact center leader and the weekend. There has to be a better way, right?

Before we go any further, let's talk about a definition of quality management. Try this on for size:

Quality Management is the function within a contact center of first determining those behaviors critical to successful customer experiences, then reviewing interactions and coaching agents to meet or exceed the standard on every customer interaction.

Viewed from that perspective, it's clear that quality management is critical to the success of our contact centers—and we see the impact being threefold.

First, quality management is key to driving agent performance through a continuous process of monitoring customer interactions, coaching and training. It's key to taking new, inexperienced agents and guiding them to full proficiency, and it takes your good agents and makes them great.

Second, quality management, especially with the right technology, can help you identify the customer interactions that most need to be reviewed and coached. The ability to search for specific keywords

and phrases and understand human behaviors can feed valuable insight to the rest of your organization, including folks in marketing, product and more.

Finally, quality management is key to better customer experiences (CX)—especially when aligned with customer metrics like Customer Satisfaction, Net Promoter Score and Customer Effort Score. These are metrics to which top executives pay close attention and we'll show you how effective quality management can help move the needle.

Let's dive in and look at how winning organizations approach quality management and better understand the full benefits provided by QM.

Better Agent Performance

“Customer service cultures are defined by leadership. They become a reality because of employees.”

– Shep Hyken

Serving on the frontlines, day in and day out, contact center agents have the power to make or break the customer experience. However, their jobs are not easy. Bigger workloads, stressful, more complex interactions and monotonous days are all part of their reality, which is why effective quality management is essential. The problem? In many contact centers, quality management is seen as a burden—for managers and agents alike.

Do you struggle to engage agents in QA? Would you like to drive better performance?

Here are a few tips you can use to boost the effectiveness of your quality management program.





1. Establish the Five Ws

A WHO—Who will conduct the QA sessions?
A dedicated QA team? Agents' peers? A supervisor?

B WHAT—Establish the performance standards that matter most to your team. Do not go overboard!
Tie them back to your mission and KPIs

Expert Tip:

“The era of the 20 question quality form is over. Your form should capture three key aspects.

1. What did the customer need?
 2. What went well in resolving that need?
 3. What could have been better?
- Everything beyond this is likely just noise that will serve to overwhelm and confuse.”

— Nate Brown, Co-Founder, [CX Accelerator](#)

C WHEN & WHERE—How often will QA sessions take place? Set a cadence, and remember, your behavior sends a message about what's important! Help your team shift out of the mindset that QA sessions are about meeting a monthly quota, or checking an item off a to-do list. Let them know you'll be monitoring their performance every week, coaching them along the way, and helping them succeed in their role.

Expert Tip:

“Stick to a schedule, so folks know when to expect it and don't let anything else get in the way. Your employees are important. Don't be too busy to meet with them.”

— [Jenny Dempsey](#), Customer Experience Manager, Number Barn

D WHY—Don't assume that your agents understand why specific standards exist on your scorecards. Explain why each item is vital to your customers and your business, and outline precisely how the agents' behavior impacts the outcome.

2. Rethink traditional coaching methods

Let your agents coach you, or try peer reviews

One of the top complaints about QA sessions? Agents do not like hearing their voice on a recording. (Be honest. Do you like hearing the sound of your own voice?) Another stumbling block? Agents can get defensive when they hear negative feedback about their interactions. When you think about traditional quality scoring and coaching methods, it's easy to understand why. Showing an agent a score before giving feedback engages their fight or flight response, making them less receptive to coaching.

Here's a simple way to address both challenges. Consider having agents review your calls, scoring you and offering suggestions for improvement. In the process of highlighting what went well and what could improve, they'll learn how they can improve their calls. Alternatively, you can allow your agents to coach and review each other. Often, teaching is the best way to learn.

Expert Tip:

“In a small contact center, I'm a big fan of peer-review. Print off and de-identify a few tickets, then encourage each agent to provide positive and constructive feedback. Discuss the results in a stand-up meeting, and then share additional feedback with the original agent.”

— [Erica Mancuso](#), Director, Offer Management, nThrive

Leverage technology to improve ramp-up to full productivity

While many contact centers still rely on highly manual processes to manage their quality program, it doesn't have to be that way. Consider how your technology stack can help your team be more productive and effective. For example, can you screen capture portions of a contact you'd like to highlight? Share those during group and individual sessions as a model for future interactions.

Coach to change behavior, not just boost numbers

Take a careful look at your customer-facing metrics, and map out the agent behaviors that lead to the best outcomes. Those are the behaviors you want to encourage. When you discover an instance of an agent perfecting the desired action, grab a snippet of the call and use it as an opportunity to teach others. (8x8's Quality Management tool offers makes it easy to @mention a whole team, or target individuals and share specific portions of a call recording). Remember, keep it simple.

Expert Tip:

“Measuring a small number of customer interactions (3-5) each week is sufficient. The quality function should act as calibration and reinforcement for the behaviors actively being coached. Attempting to react and respond to recommendations from 15+ interactions is essentially impossible for anyone. Isolate the key behaviors to change, and extend the time and patience required for developing new habits.”

— Nate Brown, Co-Founder, [CX Accelerator](#)



3. Consider which scoring model works best for your center

Traditionally, contact centers have relied on lengthy score-based forms to gauge the success of their agents. While a majority of centers still take that approach, more and more are experimenting with scoreless forms, or simplified yes/no rubrics. Why? For several reasons.

Expert Tip:

“Scores have a great deal of value...behind the scenes. In my opinion, scores should never be agent facing, as it will immediately become about the score and not about the behaviors. We, as leaders, need to be able to benchmark and show the growth of our agents. The agents, however, need to focus on one thing and one thing only—delivering the best customer experience possible.”

— Nate Brown, Co-Founder, [CX Accelerator](#)

Longer, score-based forms are prone to bias, take longer to complete and review and must be calibrated regularly to ensure objectivity. Even more troubling, score-based forms can often lead to undesired outcomes and behaviors. When agents feel motivated to aim for a score, rather than engage in behaviors that drive positive customer experience, it's most often the customers who suffer.

Think it might be time to revise your current scoring model? Here are a few pros and cons of each method.

You decide. Which method makes the most sense for your team?

- 1 Traditional 1-5 or 1-10 scale score for each item

Pros:

- This model is familiar to tenured agents and they may prefer to see a number.
- Many contact center leaders rely on hard scores to benchmark progress over time.

Cons:

- When agents focus on scoring a specific number to earn a raise or bonus, they often engage in behaviors that they've learned to "game the system." These behaviors do not always benefit customers.
- Number-based scores are often subjective and can vary based on who conducted the review. This can cause agents to resent the process and requires regular calibration to ensure the process is fair. Furthermore, making these more objective is a time-consuming process of defining the difference between a 3 and a 6—wasting energy that's best spent elsewhere.

- 2 Simple yes/no form

Pros:

- Quick, easy, cut-and-dry.
- Less subjective. Either the agent performed the behavior up to the standard, or they did not. There's no scale.
- Easier to hone in on the behaviors that need extra coaching.

Cons:

- Agents accustomed to scored QA forms can be reluctant to get on-board with scoreless models. As with any change, it's crucial to develop a careful communication plan before rolling out any new program. Explain why this model might work better for both agents and customers.
- Managers who rely on numbers to benchmark may also be reluctant to give up scores. However, proponents of this model track progress using customer-facing metrics.

- 3 Hybrid method—managers track scores, but only share yes/no with agents

Pros:

- Agents are coached to focus on behaviors, but managers still have access to numbers for benchmarking/trends analysis.

Cons:

- This method can be time-consuming and requires additional thought on the coach's part to present feedback to agents without a score.





Better Insight

Imagine having the power to deeply understand how your customers think, act and feel about your products. How might your product, marketing or engineering teams use that knowledge to drive revenue growth? Thanks to modern speech analytics technology, you do not need a crystal ball to make that possible!

The contact center has long been a source of precious data. Now, more than ever, that data is readily available and easy to parse, enabling businesses to make smarter, more strategic decisions. Is your contact center harnessing customer insight to empower other areas of the enterprise? The possibilities are endless, but we've outlined four ways you can get started.

First: a disclaimer. Without an owner, you'll never get the maximum benefits from your analytics. Many contact centers are missing out on a golden opportunity to drive transformation simply because no one owns the process. If you don't have a team responsible for reporting on, assigning action items, and tracking progress on customer-data driven projects, now's the time.

Here are just a few of the insights you'll be able to uncover.

4 Ways Your Quality Management Program Can Empower the Business with Better Data and Greater Revenue

1 Look for keywords/phrases to signal common customer issues

Are your agents escalating a high percentage of contacts to a supervisor or manager? Speech analytics can help you determine why—and fix the problem. By analyzing the interactions that lead to escalations, you can identify why customers are asking to speak to a manager or why agents are passing off customers to a supervisor. You may find that a bit of extra coaching can solve the problem—that's on the contact center to fix. Alternatively, you may find a more significant process or policy issue, or unclear marketing message that is to blame.

2 Understand buyer behaviors

Are customers asking your agents to share information about products or services you do not currently offer? Maybe they're trying to use IVR prompts that do not exist? Flagging related keywords can give your product team a treasure trove of data to use as they iterate new products or refine existing offerings.

3 Look for phrases that indicate the need for pricing changes

Have you ever wondered if your products are priced too high? Too low? Chances are your customers have already told you whether they'd be willing to pay more for your services. Are you listening? What if you could boost the bottom line just by refining your pricing model? You can! Again, enter interaction analytics.

4 Identify the top causes of customer churn

Customer churn keeps service leaders, CFOs and marketing leaders up at night. Very often, the contact center has all the data you'll need to put a stop to customer turnover. By analyzing interactions that lead to a customer cancellation, you can uncover the top reasons why customers leave. Better yet, you can prevent it from happening again in the future.





Better Customer Experience

Let's shift our gaze to the customer experience. One thing to consider when comparing customer experience and quality is that while quality management measures what matters to the business, customer experience metrics measure what matters to the customer. There must be an alignment between the two.

How does your organization measure the customer experience? One of the most common methods is through surveys at various junctions in the customer journey. This could include a Customer Satisfaction (CSAT) survey immediately following a customer interaction that's either delivered to a customer by email or presented in the IVR immediately following a phone conversation. It could also be Net Promoter Score (NPS), measuring the customer's likeliness to recommend your company or Customer Effort Score (CES) gauging how much effort was required for the customer to get their issue resolved.

These metrics matter to top executives—a whole lot more than quality scores. A recent study in [The Wall Street Journal](#) found that 50 S&P 500 companies mentioned NPS more than 150 times during earnings calls in 2018. Are we doing our part as contact center leaders to move the needle on these metrics and contribute to the success of our companies?

Three New Quality Management Habits to Move the Customer Experience Needle

Contributing change in the contact center to improve the customer experience requires a shift in our approach to quality management. The good news is that besides an increase in time commitment, the shift to QM is subtle and completely within the control of the contact center leader.

Let's get started.

1 Perform a quality and customer experience alignment check

One of the simplest exercises you can do right now is to compare your quality scores with performance on key customer metrics. For example, let's say quality scores are consistently at 98%, but CSAT is down around 70%. This means that support agents are providing nearly perfect quality, but customers are only satisfied 70% of the time.

We must question such a large delta and work to close that gap. Sure, when we're talking about the customer experience, the contact center agent is just one piece of the pie.

Customers may be perfectly happy with the support agents are providing but are instead upset with product flaws, inflexible policies and a slew of other things agents cannot control.

While this may be the case, contact center leaders may also need to reevaluate their quality criteria to determine if they are tracking and measuring agent behaviors that drive a better customer experience.

A few quick tips to get you thinking:

- A** Instead of merely being friendly with customers, encourage agents to make meaningful, human connections with them.
- B** Instead of simply giving customers correct answers, challenge agents to empower customers, anticipating those things they will likely need support for in the future.
- C** Instead of telling customers what you cannot do because of a policy or product limitation, encourage agents to focus on what they CAN do for the customer.





2 Infuse customer experience into quality coaching conversations.

Add customer experience metrics to the quality form and encourage supervisors and agents to reflect on ways to make the experience better. This invites the folks reviewing customer interactions to put themselves in the customer's shoes and view the success of that interaction from the customer's perspective. Let's say you've added an NPS question to your quality form, and the coaching conversation shifts to, "If you just improve in this area, your customer will be more likely to recommend us" or "You did amazing on this call. The customer would totally recommend us." This simple action keeps everyone's eyes on the prize.

Expert Tip:

"Customer Experience is all about self-reflection and continuously learning from past performance, and Quality Assurance programs force us to do this regularly. Taking a critical look at oneself is a prerequisite to growth. However, please take care to ensure the standards and practices encouraged by your QA program don't box agents in or result in unintended consequences."

— [Andrew Gilliam](#), IT Support Center Analyst



3 **Obsessively read customer feedback and close the loop with customers and agents.**

When customers take the time to complete a survey about their experience, good or bad, it's a sign of engagement. The fact that they cared enough to share their thoughts should compel us to take meaningful action, and our response to this feedback is very much an extension of our quality management efforts. If you do not yet have a process for reviewing and responding to this feedback, use this one:

Step 1

Read customer verbatim comments—
both positive and negative.

Step 2

Celebrate the positive.
Really celebrate, because you're doing something right.

Step 3

Respond to the negative by reaching out
to the customer directly. First, thank them for their feedback and do everything you can to take care of their issue.

Step 4

Determine, track, and quantify the root cause
of customer dissatisfaction for use in prioritizing any policy, product, or process improvements.

Step 5

Coach agents on the actions
that are within their control to improve the customer experience.

If your organization is just beginning to use customer feedback strategically like this, consider investing further in your customer engagement process. Taking action through your QA program can drive your business forward. 8x8 can show you how.

Ready to Take the Next Step?

Contact Center Quality Management is so much more than another item to check off the to-do list. It's a business imperative for companies that want to succeed in the age of the customer. Well-designed quality management programs have the power to revolutionize agent performance, supercharge voice of the customer programs, and ultimately, improve customer experience.

Whether you're building a program from the ground up or ready to take the next steps to refine your current program, 8x8 can make the journey easier! 8x8's Contact Center with Quality Management and Speech Analytics helps you deliver excellent customer experiences while maximizing agent efficiency.

To learn more, visit www.8x8.com/contact-center/quality-management

Ready for a demo? Email us at enterpriseADR@8x8.com



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