



# WHITE PAPER

## 6 Elements of a CX Quality Monitoring Framework

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As customer expectations continue to grow, it is imperative that businesses have robust processes in place to measure their service delivery against these.

Your CX advisors and front-line staff are the voice of your brand and are often responsible for executing on your brand promise. How can the 'promise' vs reality gap be closed?

A robust Quality Monitoring programme is what leading organisations are investing in. It is a program that monitors customer interactions to measure performance and help implement the organisation's strategic objectives.

The three main resources required to deploy Quality Monitoring framework are 1. QAs (Quality Assurance Analysts), 2. an online Quality Monitoring platform and 3. a Call Recording Solution.

This whitepaper explores, in detail, the 6 key elements of the Quality Monitoring Framework to consider during implementation.



# 1

## QUALITY MONITORING SCORECARD

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Building an accurate bespoke scorecard that fits the nature of your business is one of the most essential elements of the Quality Monitoring process. The trick here is getting the right balance between the three key aspects to measure; Process Adherence, Compliance and Customer Service skills! It is important to note that all types of customer interactions; calls, emails, webchat, social media and back-office transactions should be monitored, and you have a customised scorecard for each type of interaction.

Simple tools that can be used to build the scorecard to help you collect and organise ideas and factors that impact interactions handling are Fish-bone Diagrams, Affinity Diagrams and Flow Charts.

**Monitoring Sample** – Once you have the scorecard ready, traditionally you would have to agree on the ideal sample size that the QA will monitor. However, with the progression made by Interaction Analytics solutions, you don't really need to make do with a small sample size. Speech & Text Analytics reformulates the Quality Assurance equation. In the past, our approach has always been to monitor a sample of customer interactions, thoroughly review each in the sample, and extrapolate the data to the whole population. With Speech & Text Analytics, we start with the whole population i.e. monitor 100% of customer interactions, observe specific, pre-determined areas of focus, and drill down to the actionable events of either positive reinforcement or performance modification.

### **Types of Evaluations & Monitoring**

Once the analytics solution has identified risky calls that need further investigation, QAs/Team Managers may adopt different types of evaluation techniques to measure performance and coach advisors effectively, depending on the situation and tenure of advisors; be it new starters, seasoned or tenured advisors.

### **Remote Monitoring of Recorded Calls**

Evaluator remotely monitors a customer interaction without the advisor being aware he/she is being monitored.

This technique ensures that the agent, at any given point in time, provides accurate and complete information and does not get conscious to do the right thing only when they know an evaluator is monitoring them. This is the most preferred means of quality monitoring.

### **Side-by-Side Monitoring by Team Managers (Live Calls only)**

- Evaluator sits next to the agent during a live call
- Ensures that the advisor follows the correct procedures and uses the required tools
- Helps the Team Manager identify areas of improvement if any
- Direct & real-time feedback is provided to the advisor either during or immediately after the call or any type of customer interaction

This technique is mainly used for new advisors or advisors with a higher call handling time.

### **Peer to Peer Evaluation / Group Evaluations**

Agents perform group evaluations with fellow agents, promoting healthy competitive spirit. This technique is specifically helpful in a multi-lingual contact centre where it might be expensive and impractical to have QAs speaking multiple languages.

### **Self-Evaluation**

- Agent evaluates his/her own call, rates themselves on the monitoring form and then calibrates with QA or Team Manager
- Gives the agent a better understanding of the monitoring scorecard
- The end goal is to improve performance with self-initiative from the agent's side.

### **3-in-a-Row / 5-in-a-Row**

QA evaluates sequential calls, either 3 or 5 in a row to identify patterns. Again, very beneficial technique to coach new agents.

### **Scanning**

Evaluator listens to specific portions of a call or scans through specific portions of an email response. This technique can be used in scenarios where a new opening statement or brand name has been introduced or a new disclaimer statement has to be said towards the end of a call.

## 2 COACHING AND FEEDBACK

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Coaching & Feedback is a key step within the framework. However, in many contact centres, this is often ignored or given least importance as compared to managing day-to-day service levels, resolving complaints and people management issues.

**Transactional Feedback** - It is vital to provide transactional feedback pertaining to individual quality evaluations. Best way to instill the rigour for feedback delivery is to set target for feedback to be delivered within 24-48 working hours. This can be easily done in contact centres by tracking (a) the timeliness of feedback delivery and (b) ageing of pending feedback. Only when feedback is delivered, an agent can correct the behaviour on interactions handled on the next day.

Using an automated, online portal for Quality Management, which gives agents access to their scorecards, drives huge improvements by itself. It speeds up the feedback process, inculcates immediate corrective behaviour and, most importantly, puts the agent in the driver's seat to improve their performance.

**Coaching** – For overall coaching and development of your agents, the G.R.O.W. model is a tried and tested, yet simple, method for goal setting and problem solving. The team managers in your contact centres can adopt to this model to structure their coaching sessions.

The G.R.O.W. coaching model offers a framework with general questions to elicit goals, work through obstacles, explore options, and much more, without ever needing to offer advice or force any direction. With this model, the coach provides a dynamic vehicle for their agents' development.

**Goal** – Define specific objectives, long-term and short-term. Goals should be S.M.A.R.T.

**Options** – Cover full range of options, invite suggestions from agent, work through obstacles and ensure choices are explored

**Reality** - Invite self-assessment, offer specific examples of feedback, avoid assumptions and discard irrelevant history

**Way forward** – Choose one appropriate choice, check on motivational level of agent, commit to action, agree support and timing, set up review date.

## 3 CALIBRATION SESSION

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One of the key strategies to provide a consistent customer experience in the contact centre is regular call calibrations in which the Team Managers (TM), supervisors, QAs, trainers, SMEs and agents participate, individually grade and discuss customer service interactions.

- Call calibration is an important strategy to ensure that your managers, supervisors and QA teams can effectively and consistently evaluate agent performance & improve customer service
- This is recommended to ensure that service organisations are scoring key behaviours for success
- In a calibration session, everyone has an opportunity to rate the interaction before the calibration session
- During the calibration, the participants align with the supervisors and agents on technical behaviours (e.g., compliance and procedural issues) and soft skills (e.g., empathy, politeness, helpfulness)
- More sophisticated tools like 'Attribute R&R' from the world of Six Sigma and Measurement System Analysis can be used to consistently measure accuracy between participants and with themselves
- The objective is to enable a seamless and consistent measurement experience for agents, no matter who evaluates the customer interaction.

## 4 QUALITY KPIs AND REPORTS

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Implement a variety of Quality Reports to adhere to the Quality Framework for example (i) Quality dashboard showing quality scores for all channels (ii) Track Quality Scores by agent and by teams (iii) Agent Stack Ranking report showing a consolidated view of agent performance in rolling 30-60-90 period with Red-Amber-Green status - depicting Quality scores, AHT and individual agent-wise C-SAT scores, thus co-relating Quality scores with other KPIs.

## 5 RCA AND CONTINUOUS IMPROVEMENT

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Root Cause Analysis (RCA) focuses primarily on systems and processes, not individual performance. Root cause analysis is a process for identifying the basic or causal factors that underlie variation in performance. The analysis could include;

- Pareto Analysis to depict performance by line items / attributes / sections of the Monitoring Scorecard.
- FCR (First Contact Resolution) Analysis to identify and improve non-FCR friendly processes and to determine top reasons for poor resolution rate.
- Quality scores by contact reasons, market, products and lines of business will highlight Product issues and Process gaps and then work closely with Product / Process teams to continuously improve processes and address complaints/dissatisfaction.
- Review end-to-end customer journey for processes not delivering FCR, using tools like Value Stream Mapping to identify non-value adding activities. Conduct end-to-end process reviews, identify opportunities for automation, contact deflection, repeat call reduction, improve FAQs for customers on product websites and enable self-serve opportunities.
- Training Need Analysis will identify refresher training needs for individual agents. Refresher training could be delivered 1-2-1 or in a group via an online learning platform or in a classroom-based environment, depending on the nature of the topic. An online learning platform like ['Ember's Errol Owl'](#) can be an excellent tool to improve knowledge retention, compliance, coaching and more!

When talking about Root Cause Analysis and Continuous Improvement, it is worth mentioning that investing in an interaction analytics solution is a smarter decision! The analytics solution will give your business the ability to easily identify issues you didn't even know to look for. The speed at which you can unlock business insight is unbelievable. It identifies key drivers of long calls, repeat calls and other costs and satisfaction drivers, leading to identification of process improvement opportunities across all agents, enterprise-wide. This gives users the ability to mine their interaction data, group calls by their category and frequency, and then establish the root cause of their calls.

# 6 COMMUNICATION PROTOCOL

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Strong partnership between significant functions within your contact centre is key to the feedback loop and overall development of the agents.

Thus, Quality Monitoring in any contact centre is essential to the success of a business, whether the contact centre has been outsourced or remains in-house. Careful consideration should be given to ensure the feedback and coaching given to agents is productive and will lead to agent progression and employee satisfaction. This, in turn, will enhance the customer satisfaction!



## FINAL THOUGHTS

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In this day and age, we cannot end this whitepaper without emphasising the value an Interaction Analytics solution can bring to your contact centre. So, continuing from our point made earlier regarding deployment of speech and text analytics solution, it is no doubt a very impressive solution that not only automates the Quality Monitoring process, but is also beneficial to ensure compliance, script adherence, increase sales, enhance Voice of Customer scores, perform RCA and trends analysis.

Given the advantages of an analytics solution, it leads to the obvious question: Can Interaction Analytics replace the manual approach to Quality Monitoring?

The prospect of replacing the Quality Monitoring program with Interaction Analytics has been raised. These are two different approaches with varying strengths and weaknesses. It makes it easier to see how well these two can work in tandem—Interaction Analytics working hard, driving through every call, finding those pieces of potentially important information, and handing off to a QA for a deep dive and further investigation. Having both Interaction Analytics and a Quality Monitoring program, is the way to go.

Interaction Analytics can offer value on its own, plus it can make your quality monitoring program better and the results are exciting. It does not, though, eliminate the need for a manual Quality Monitoring program.

**Are you looking for an inexpensive, state-of-the-art Interaction Analytics solution combined with a highly sophisticated Quality Monitoring program that will revolutionise your operations? If yes, we are here to help!**

At Ember, we offer swift and cost-effective implementation of solutions, assess the health of your contact centre operations and discover hidden trends and patterns, providing actionable insights that relate purely to your business. Trust our skilled experts to help you understand what *better* looks like for your business! Get in touch with our analytics experts today!!

## **ABOUT THE AUTHOR**

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Rena Ghotey has over 17 years of extensive experience in Quality Management, Customer Services Operations and Continuous Improvement. She is a certified Green Belt in Six Sigma and has a Bachelor's degree in Business and Master's degree in Computer Management.

Using her contact centre, outsourcing and quality background, Rena has led strategic transition projects in the past, leading to significant reduction in costs. Her ability to understand the requirements of clients and maintain a strong customer focus has given her great success in enhancing customer experience for various organisations.



## **ABOUT EMBER**

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Ember Group was established in 2010 and is a specialist consulting, analytics and professional services group dedicated to transforming customer engagement and CX strategies and operations for major brands globally.

With offices in London and Toronto, they deliver solutions to help organisations realise their customer service vision and increase commercial value from their service operations.

The Ember Group has teams of specialists across various practices and disciplines, including service operations, digital, outsourcing, technology, commercial and finance, analytics, recruitment & search, training and L&D.



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