
Gap Analysis for Individual Training in the Call Center



Scorebuddy
QUALITY SCORING SYSTEM

INTRODUCTION

Today's call centers are on the front lines of most customer communications. Agents are called upon to not only manage direct interactions but perform at levels that engender customer loyalty for the long-term. That's a heavy load but certainly one that skilled agents and center managers can manage.

Quality assurance is the key dynamic and can be left to subjective interpretation without benefit of more analytic tools. Fortunately, agent scorecards can reveal strengths and weaknesses as a baseline for root cause analysis. Further investigation will reveal gap analysis and areas where training can dramatically improve call center activity as it works toward the goal of customer delight.

How to Use Scorecard Quality Data to Drive Improvements in Agent Performance and Customer Experience

Quality assurance is a must in today's customer experience culture. Customers have so many choices available to them and can easily switch to another company, leaving businesses and brand relationships vulnerable. And because the call center is a pivotal point of contact, the weight of customer relationships often rests on its shoulders.

Every call center interaction is critical and agents must be on point to not only resolve the customers' interaction but also to secure the relationship moving forward. But what happens when customer feedback isn't as positive as it needs to be? What are the root causes for this disconnect?

There could be several reasons but often it falls on agent performance. Fortunately, there are opportunities to improve individual activity for the greater good of the brand.

Moving past the discomfort of agent monitoring

Collecting agent scorecard data is the first step toward identifying and altering problematic agent performance, but how can that be accomplished without alienating agents who may resent being monitored? No one - even high-performing employees - likes performance appraisals. This is especially true in call center environments where agent activity is subject to constant monitoring.

Even though monitoring is critical in a quality assurance initiative, agents may feel as if they're being singled out for poor performance or are being punished for not working to capacity all the time. Creating - and working to - call center scorecards, agents can see that any reviews of their performance are usually fact based from pre-determined criteria, reducing the subjectivity of any performance issues.

A proven way to reduce negative attitudes towards these Scorecards is to include your agents in the development of them at the outset. When they have the opportunity to contribute, they are more inclined to understand and to buy into the standards and perform accordingly.

How to build Scorecards that will help to bridge performance gaps

Creating actionable scorecards will help agents and managers to objectively evaluate agent performance on an ongoing basis. It's important to design the scorecards for relevance and then collect and analyze the data that results from customer interactions.

- **Focus on the purpose of your scorecards:** Are you trying to assess? What behaviors lead to a successful call outcome? Do you have specific weaknesses to highlight? Are you trying to understand gaps in agent training? Try to be as specific as possible when designing scorecards so you'll get better data to work with.
- **Be sure to solicit agent input:** Agents are more inclined to participate in monitoring situations when they have had the opportunity to participate in setting the criteria to be evaluated. If possible, include customers in the discussion so that you have a well-rounded view of the center's activity and can gather appropriate information that could help the brand overall.
- **Decide what you will measure:** What are the behaviors and content of a successful interaction where the

customer leaves feeling satisfied? What does the business need in terms of regulatory or process adherence? What are the characteristics that reflect the Brand? All these items can be measured on scorecards which can then pinpoint gap analysis to determine further training.

- **Monitor and adjust scorecard parameters:** A call center is a dynamic organization with many opportunities for growth and change. This makes it critical to be vigilant in monitoring scorecard criteria and adjusting when appropriate. The sooner relevant revisions are made, the sooner agent behavior modifications can occur and customer satisfaction can be cemented. Scorecard designs and weightings should be questioned and reviewed regularly.
- **Collecting scorecard data for analysis:** Based on your scorecard parameters, you should soon see actionable data that will help with gap analysis and further agent training. If collected properly, data will help managers and quality assurance specialists identify agent strengths and weaknesses. This information can then be shared with agents to both facilitate improvements as well as recognize achievements.

Objectivity and subjectivity in defining gap analysis

Creating scorecards that identify ideal agent behavior is just the beginning. Analysis can get complicated because there are objective and subjective decisions that managers have to make. There are standard behaviors - which are quantifiable - such as asking for an order or verifying customer data. These are cut and dried components and there's little room for misinterpretation.

This gets more difficult when managing agent performance objectives which are more qualitative. Does the agent easily build a good rapport with customers? Can he or she diffuse heated situations? Is the agent articulate and professional? Identifying these behaviors on a scale (e.g. 1-5) will help determine how to bridge the gap of where the agent is now and the desired behaviors in the future.

To ensure that the evaluations are consistent across multiple evaluators

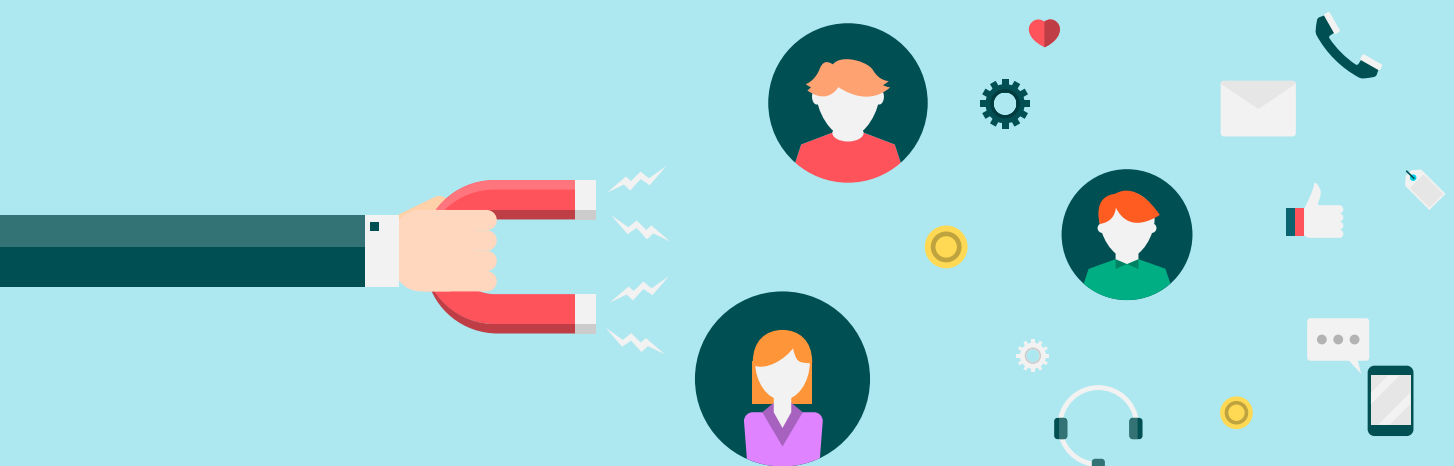
scores should be calibrated by allowing multiple evaluators score the same event and comparing and contrasting the results, if there is a significant variation between two scores then a discussion about relative weightings and views will align scoring across the team.

Designing actionable scorecards is a great start to building a highly effective call center that is both productive and positive in securing important customer relationships. And when scorecard results are optimized, agents can be given valuable training to bridge the gap to higher performance.

The end result will be highly functioning employees who are interested in securing customer loyalty and will be able to work effectively on their personal goals to achieve it.

Get started on your custom scorecards today by using the flexible Scorebuddy [scorecard builder](#). Act now to get a free 30-day trial.

The combination of objective and subjective analysis of agent behavior will be the key to improving interactions with customers. A comprehensive root cause analysis will identify opportunities for improvement through short- and long-term training initiatives.



HOW TO ANALYZE DATA TO IDENTIFY GAPS IN AGENT TRAINING

We looked at how quality assurance (QA) and scorecard data can help improve agent performance and lead to greater customer experiences. What about getting to the root of the problem? Unfortunately, many call center managers spend way too much time putting out fires, and having the time to dig for root causes would be a luxury.

Here's the rub in that line of thinking. It's only by understanding root causes that any type of change can be enacted, which, in turn, reduces the number of fires. Your very own call center Catch-22.

So, how do you put a stop to this fire vs. root cause dilemma? By creating call center scorecards and analyzing the QA analytics gleaned from the scorecard data, call center managers and QA managers can pinpoint areas where agents need further training. This type of gap analysis shortens time for improvement and ultimately, creates better customer experiences which are the end objectives for your brand.

Gap analysis in the call center

In its simplest terms, a root cause is an element that has caused a malfunction or problem in a process. It is applied in most industries to determine the source of problems using a number of approaches, techniques and tools to uncover the source - or the root - of a business problem.

Root cause analysis has been developed on the premise that problems are solved best when attempts are made to eliminate or correct the root problem. This is in contrast to solving problems by addressing only quick fixes to get by for a short period of time. Root cause analysis works as a fundamental premise in continuous improvement initiatives.

Based on the principle that events and systems are interrelated, root cause analysis

is used to determine where and how the problem started and how it grew into the current problematic situation. Root cause analysis looks at the three types of causes for most situations:

- Human causes can be attributed to situations where people didn't behave or work to expectations.
- Physical causes are malfunctions in equipment or other material source of a problem that has occurred.
- Organizational causes include breakdowns in processes and policies that hinder employees from doing their work properly.

When these causes are examined, patterns, system flaws and other factors can be identified as root causes that are blocking progress and growth.

Finding the Gap

Many times the symptoms of a problem are identified but the root cause remains, leading to a repeat of problematic behavior or continued reliance on a broken process or system. There are, however, some steps to take to identify the root causes of a poor customer experience so that gaps can be bridged through coaching, process improvements and perhaps needed adjustments in the quality assurance parameters. Some common root causes can be discovered via the following tactics:

- **Talk to agents and Supervisors:**

Establish a focus list Your goal is to generate an initial target list of possible causes, your agents and supervisors are a great source for this.

- **Apply the list to your QA**

Framework: Use the evaluation time to tag a poor score with the likely cause, for best results you should try to associate

root causes right down to question level in your scorecards. over time the top issues will be revealed. Over time additional causes will be added to your focus list and others will be removed as you address them.

- **Consider your Rules of Engagement:**

In many cases the rules that the business attaches to processing of a customer interaction restrict the agent from offering the best service, that may relate to a rigid script or limited authority to manage an account. Consider this when constructing your root causes list.

- **Categorize customer problems:**

You should be able to easily identify problems that customers have due to agent interactions as opposed to those that stem from marketing, product or other issues. Training may need to extend to other groups in the organization if their efforts are creating problems for call center agents.

Reducing the Gap

Root cause and resulting training should be viewed from a strategic vantage point with certain guidelines to direct the process.

- **Careful assessment can help identify skill gaps:** Digging to get to the heart of a skill gap can take time so be prepared to devote the necessary time. By quantifying the number of times you can attribute a poor customer experience to an identified cause will allow you to focus on the top ten and try to eliminate or reduce them through training or process improvement.

- **Establish necessary agent skills:** Training will improve skill levels and proficiency and agents should be able - through relevant, ongoing training - to advance to more proficient levels. Evaluations and call monitoring will give you an idea of how effective agents are in their roles, carrying out gap analysis at the QA evaluations stage will reveal what knowledge is required by which agent.

- **Reassure agents about training:**

Agents shouldn't be made to feel that they're being tested or further trained because they are inadequate. Let them know that everyone needs training to advance for their own good and for the benefit of the business. The goal is for each agent to become proficient at each step in his or her career and feel incited to improve when training opportunities are presented.

- **Create a gap training plan:** Once skill gaps have been identified via scorecard data analysis, a comprehensive training plan should be developed. The plan should include both group and individual agent training plans based on the relevant assessments.

- **Promote the benefits of ongoing training:** Because the call center is a pivotal point of contact for customers, it will always have high priority in a business. Agents should be proud of their frontline interactions with customers and the trust that the brand places in them. Further training should support

this and engender confidence in agents at every step of their progress.

- **Communicate the necessity of training:** While agents should feel good about ongoing training, they should also realize that it's not an option. If training is recommended for individual agents or the entire team, it needs to be presented as non-negotiable on the path to greater customer satisfaction and loyalty.

Gap analysis is a proactive initiative designed to improve agent proficiency and call center effectiveness. But, further, it will dramatically improve customer satisfaction and should be on the dashboard of any call center manager interested in the ultimate quality assurance initiatives.

Scorebuddy takes root cause analysis a few steps further through [gap analysis](#). This helps managers aggregate the scoring data from scorecards to show where training initiatives should be implemented. Scorecard data shows agent vulnerabilities and it's easy to see where training should be directed to improve performance today and customer experience long term.



Data and resulting analytics should also be shared with agents so that they can understand how their performance affects call center objectives.

The scorecard allows managers to conduct coaching sessions and resulting training initiatives backed up by performance data.

Digging deep into actionable data provides a solid gap analysis that sets up the call center for continuing improvement through appropriate agent training as well as other center improvements.

Working with the fundamentals of a scorecard process, quality assurance managers and agents can not only dramatically improve how the center functions but will also directly impact customer interactions for the long-term health of the brand.

Gap analysis is best viewed from a strategic perspective so that quality assurance managers can develop an appropriate plan, punctuated with pertinent training sessions. Continuing education opportunities are not only beneficial for agent progress; they're the life blood of a brand.



CLOSING GAPS IN AGENT TRAINING AND RESOLVING THE ROOT CAUSES OF CUSTOMER DISSATISFACTION

Root cause analysis (RCA) is a systematic process for identifying “**root causes**” of problems or events and an approach for responding to them. RCA is based on the basic idea that effective management requires more than merely “putting out fires” for problems that develop, but finding a way to prevent them.

Root cause analysis in the call center means looking beyond the superficial and identifying the problem’s core. Most negative outcomes have deeper issues at their core, whether they’re human, organizational or physical as defined.

Root cause in the call center can be relatively easy to identify and change. One approach is to add RCA to your QA framework. Use of [agent evaluation scorecards](#) to collect, quantify the attribute causes to poor outcomes. The blog, “How Scorecard Data Can Drive Improvements in Agent Performance and Customer Experience” outlines the importance of agent behavior and how to capture relevant data via scorecards.

Customer satisfaction is the ultimate goal of every call center so it’s critical to understand root causes of customer dissatisfaction, so they can be positively altered through appropriate agent training or improving the underlying processes.

How to Bridge the Gap

Many times the symptoms of a problem are identified but the root cause remains, leading to repeat problematic behavior. There are, however, some steps to take to facilitate root cause so that gaps can be bridged and agents can successfully work within quality assurance parameters. Some common root causes can be discovered via the following tactics:

- **Identify conversations that seem abnormally long:** Parameters such as repeated calls and call duration can be identified via speech analytics. Specific keywords used during the calls can indicate problems or customer dissatisfaction which should be alerts of more training for those agents.

- **Conduct real-time observation:**

By listening to live calls and observing how the agent uses the processes and tools at the desktop, you'll be able to pinpoint problem areas quickly. This works for both agent behavior as well as outside elements such as new marketing campaigns and sales activity. Calls coming in from customers who are confused about the details indicate the need for some course correction and agent updating.

While useful for creating a list of root causes, it can be difficult to say how widespread those causes are across the team. Using the QA evaluation process to tag poor scores with root causes allows you to aggregate that information so

the main reasons become obvious and through ongoing monitoring trap any new issues that may be introduced over time.

- **Consider physical elements:** As mentioned earlier, root causes can be based in physical problems. Acoustics and equipment problems can quickly deflate a call with a customer leading to dissatisfaction. Agents need to be trained to understand that reporting any flaws in their surroundings or equipment need to be elevated as soon as they're noticed.

- **Categorize customer problems:** Every issue is not under the control of the agent, it is important to take a wider view and categorize issues causing negative customer experience, e.g.

Category	Example	Resolution
Agent Behaviors	Abrupt tone, long silences or hold time, poor use of language	Supervisor coaching while reviewing call recordings, peer reviews
Agent Skills	Inaccurate or missing product knowledge, unfamiliar with tools or processes	Assigned product or application training
Customer Support Processes	Restricted authorization to manage the customers issue, unnecessary escalation rules	Review and revise rules of engagement and look to enable the agent when resolving an issue
Supporting Tools	Cumbersome CRM processes or in-call scripting	Review CRM and scripting for efficiency and replace or streamline where possible
External Factors	Poorly designed FAQ section in website, misleading product information or advertising	Alert department responsible and highlight the issue

Managing a gap analysis in the call center

Root cause and resulting training, system or processes changes should be viewed from a strategic vantage point and the very positive effect it can have on the commercial growth of the whole organization. When it comes to critical agent training here are some guidelines to direct the process.

- **Careful assessment can help identify skill gaps:** Digging to get to the heart of a skill gap can take time so be prepared to devote the necessary time. The lift in customer satisfaction will be worth any time dedicated to it.
- **Establish necessary agent skills:** Training will improve skill levels and proficiency and agents should be able - through relevant, ongoing training - to advance to more proficient levels. Random testing and call monitoring will give you an idea of how comfortable agents are in their roles.
- **Reassure agents about training:** Agents shouldn't be made to feel that they're being tested or further trained because they are inadequate. Let them know that everyone needs training to advance for their own good and for the benefit of the business. The goal is for each agent to become proficient at each step in his or her career and feel incented to improve when training opportunities are presented.
- **Create a talent map:** Once skill gaps have been identified via scorecard data analysis, a comprehensive training plan should be developed. The plan should include both group and individual agent training modules based on the relevant assessments.

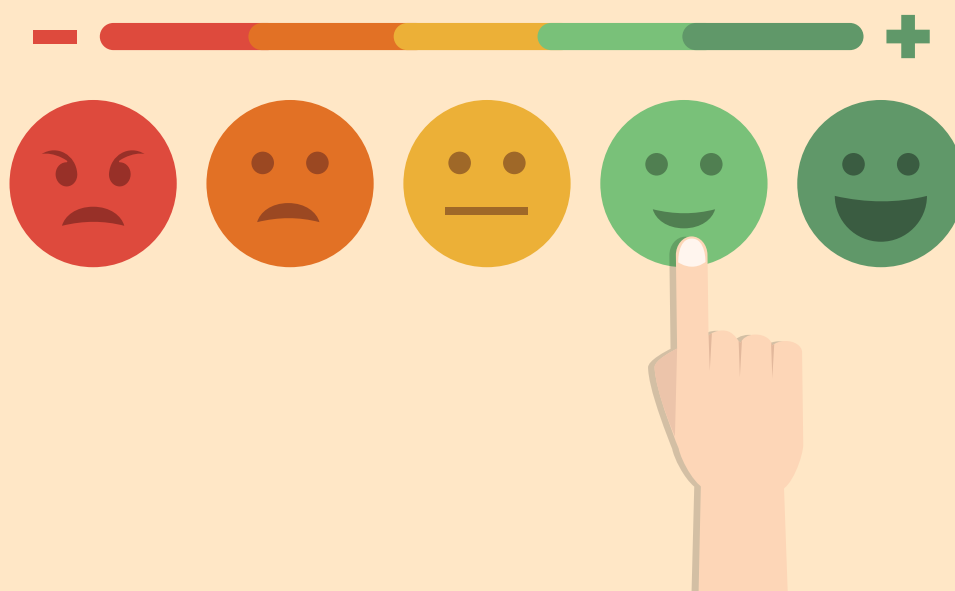
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Gap analysis is a proactive initiative designed to improve agent proficiency and call center effectiveness. But, further, by applying RCA routinely at this vital customer touchpoint it will dramatically improve customer satisfaction and should be on the dashboard of any call center manager interested in the ultimate quality assurance initiatives.

A call center is a dynamic organization - always growing, always improving - for the benefit of the brand. The people who take on this important work should be trained - and recognized - to further the organization. Gap analysis employed by managers is the best route for call center agents to improve their own performance and, ultimately, grow the business.



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