
If Your Contact Center Uses Spreadsheets, READ THIS



INTRODUCTION

This eBook is designed for contact center management teams who are striving to create a more positive, efficient, and productive work environment, are focused on improving customer service and are ready to ramp up their internal Quality Assessment process.

Knowing the limitations of contact centers that manage quality using scorecards created in Excel -- or, really, any contact center needing to scale -- this eBook focuses on the benefits of streamlining data collection focused real-time reporting and its definitive impact on employees, clients and contact center Return on investment (ROI).

More specifically, we will explore the following three topics:

1. Are Spreadsheets Burning a Hole in Contact center QA Productivity?

You may feel spreadsheets are the most effective choice for your contact center. Still, it is worth exploring other options if only to know whether you're missing out on ROI opportunities or a more productive contact center operation. This section makes a case for measuring the real cost of using spreadsheets vs. implementation of a real-time reporting and an analytics dashboard to manage your contact center QA. Discover the benefits of contact center automation and find out if it's right for you.



2. Eliminate Your Spreadsheets to Create Accurate Contact center QA Reports

This section will guide you and your team on how to create contact center QA reports that are accurate and impactful. How you collect and organize QA Evaluations data will directly impact on the value of your reports and QA Analysis. Learn ways to design and build reports that everyone from the contact center agent to team leaders, contact center managers and even the CEO and Board of Directors know are correct as well as actionable.

3. How to Engage Agents with Real-Time Reporting on Accurate Data

In this section we highlight contact center agents, the people on the front lines who speak with your customers on a regular basis. We explore the many ways real-time reporting and accurate data engages agents, helping them to become more efficient and cost-effective in their work. With real-time feedback and reporting, gone are the days of outdated and awkward reviews. Now there are opportunities for positive workplace cultural changes, and more impactful and immediate opportunities for success.



THE HIDDEN COST OF USING SPREADSHEETS FOR CONTACT CENTER QA EVALUATIONS

Time - every business is (or should be) concerned with it. Working hard is important, but working smart, especially with your usage of time, is what can set you, your contact center team, and your company apart.

One of the greatest time drains on contact centers is the way in which quality is measured. [Spreadsheets are holding back contact center progress](#). While they do serve some purpose, they are largely inefficient as a data gathering and reporting tool and are unable to scale as your contact center grows.

Scores and data must be collected, analyzed, reported, and then decided on before the cycle begins again. Regular reporting is an essential part of contact center management used to:

- Quantify the quality of customer interactions
- Measure against your quality goals
- Track Adherence to process and regulations
- Measure employee performance
- Collect and analyze [Net Promoter Scores \(NPS\)](#) and customer service feedback

Accuracy - To collate, measure, and make quality business-driven decisions with a spreadsheet is incredibly limiting. Not only does this take more valuable time, but with manual inputs of data and formulas errors are far more likely to occur.

Benefits of using a dedicated QA Solution

Every manager or business owner should immediately know the numbers. Day-to-day data matters, but, as any contact center or quality assurance manager knows, it is often most useful when key performance indicators (KPIs) are tracked with their performance examined over time. Trends must be appropriately identified in order for business to improve. Quality is a critical KPI and without a [proper quality assurance scorecard and tool](#) for measurements and reporting, improvements in processes and performance cannot be made.

Guessing on key decisions and prioritization is not in the best interest of any contact center's management model. There is a wealth of data – data on agent performance, sales statistics and trends, client retention rates -- use all of it to your advantage. While spreadsheets only get you so far, automated dashboards may be manipulated, sliced and diced in a variety of ways with a click or two. No complicated formulas and no nonsense.

Engage Your Agents



Identify Trends



Improve Your Quality



Designing a scorecard for your business? Focus on what matters.

To get the most effective set of reporting downstream it is important that the data collection, (i.e. the Scorecard) is designed with the end result in mind. When designing your evaluation scorecards you should ask yourself:

- What is important to the customer?
- What is important to the business?
- How do customer expectations vary across channels?
- How should the QA scores be tagged and categorized?
- What reports do I need to help manage the quality of service delivery?
- How do I make it easy for the Evaluator?

By asking these questions you will craft a scorecard that captures the quality of a customer interaction in meaningful terms and organizes the result so that the reporting highlights areas for attention and action and reflects positive (or negative) changes in customer service delivery.

Streamline reviews

Sharing data also streamlines the contact center employee review process. With less guesswork and more data, both agents and managers are better informed about performance. Both parties will quickly see if performance is trending in a good direction or one that leaves room for growth. Identifying a contact center agent's strength will more immediately and transparently present issues and accolades up front thus resulting in higher agent engagement and ownership in their performance.

Get real-time analysis

With automation, gone are the days of waiting for the spreadsheet to be updated and end of month reporting. With dashboard access, anyone who has permission can see whatever real-time data they wish to view. This data may also be exported or shared in any way that is most efficient for the management of your contact center.

Improve reporting

Leaders need to know how well their contact center performed this December compared to the previous December. Whether you are most interested in year-over-year, quarterly, monthly reporting, or all of the above, only a database and secure, time series data stored in a system designed for that purpose, enables data to be retrieved in real time. With a significantly lower margin of error, automation saves time by removing the need for manual spreadsheet inputs and pivot tables that may not be accurate and are vulnerable to change. Adding filters to the data will give you even more granularity, tags such as interaction type, product, or even NPS predictor will tailor your reports and focus attention where it is needed.

Be prepared

With a single repository holding your QA data contact center and quality assurance managers can refer to automated data in real-time and be prepared to make quick, informed decisions as necessary. Meeting with senior management? No more spending days checking pivot tables and prepping decks with questionable statistics. Get what you need at the click of a button.

Bottom Line

If you want to move the quality and customer experience needle, a dedicated QA solution is not a nice-to-have, but an absolute must-have.

So many contact center decisions are rightfully based on data. It only makes sense to optimize gathering, analyzing and reporting on data for maximum returns.

2

ELIMINATE SPREADSHEETS TO CREATE ACCURATE CONTACT CENTER QA REPORTS

If you want to deliver great Customer Experience in a productive and collaborative way you are going to need more than spreadsheets to get the job done right. A contact center is not scalable for quality management or growth without a robust QA software solution.

Pulling data from various sources, relying on manual inputs and formulae creation only serves to increase the margin of error. Time is spent -- and wasted -- on checking data sources, copying and pasting, cloning, and debugging. Spreadsheets are inefficient and offer very little value to contact center quality management, let alone supporting accuracy, increased customer satisfaction and growth.

There is a better way. Imagine viewing essential key data points from an easy to read, at-a-glance dashboard that is not only customizable, but at once exportable and shareable with key stakeholders.



If you want to create accurate reports, do this:

Invest in an automated contact center QA measurement and reporting tool.

Obviously, we are partial to Scorebuddy, but with good reason. Ramp up your contact center's efficiency and quality with the following benefits:

- **One, easy-to-access analytics:** Share and export data with managers or colleagues.
- **Customizable data points and time frames:** View your data by year-over-year, month-over-month, or however you prefer to identify contact center trends.
- **Real-time analysis:** No need to run reports or wait for data to collate. Get what you need, when you need it.

The Scorebuddy analytics module takes the guesswork out of reporting, so that you can immediately identify your successes and opportunities.

There are few things worse in the world of contact center management than wasteful meetings that take time away from execution.

If you want to facilitate quality meetings, do this:

Good news: if you have accurate reports, you can lessen, or perhaps even eliminate some of these wasteful discussions.

With an automated agent dashboard that accurately reports data, you can save time by following these steps:

1. Share reports with contact center leaders:

No more presenting or taking managers through lengthy spreadsheets with numbers that may or may not add up. Set and forget your monthly or weekly reporting to arrive in your manager's inbox.

2. Analyze and review with confidence:

If you do present, you may do so with quality data, pre-built, color-coded charts that cover a variety of cross-departmental metrics. Because the data is presentable and customizable as needed, presentations take

little time to prepare. This way you and your team can focus on what matters most to the bottom line -- including presenting results to senior management.

3. Run through the data in real-time:

If you get a question during your presentation, run the data right then and there. Quickly filter for what is being asked. Better yet, grant access to leaders who want it, and empower them to customize the data they prefer to view when they want to view it.

4. Drill down from the headline number:

if you want to see the underlying teams or scores behind a trend just click through the chart

Stick to what matters most and keep meeting time productive and insightful.

Focus on building the business, not on looking at outdated spreadsheets with what is likely, inaccurate data.

Bottom Line

Accurate, real-time data leads to more efficient meetings. A contact center work environment with less time spent on producing analysis and even worse, talking about analysis, is far more likely to be successful.

It is not that measuring data is not important. It is, in fact, crucial. And because it is so essential, is why it must be streamlined in a way that is most productive.

This data and the decision-making that follows its analysis directly impacts leaders, managers, agents, customers, and clients, not to mention overall revenue. It is not to be taken lightly. Our recommendation: automate to get it right.

3

HOW TO ENGAGE AGENTS WITH REAL-TIME REPORTING ON ACCURATE DATA

“If you can’t measure it, you can’t manage it,” Peter Drucker, the man deemed the founder of modern management and the author of the bestselling leadership book, *The Effective Executive*, is often quoted as saying.

These words ring true at all levels of business and most certainly when we speak of contact center data collection and analysis; used to measure and analyze agent performance.

If a contact center agent does not receive feedback, how will they know if they are succeeding or missing the mark? The answer is simple: they won’t. And as a contact center manager, it is your job not only to ensure that agents have a thorough understanding of their current performance, but what steps they can take to improve.

It is important, also, to understand that it is not only the measurement itself that matters, but the way in which data is collected, stored and reported upon. While it is certainly possible to reduce employee performance to a set of numbers that may be input into a

spreadsheet, this is a limiting way to store and report on performance of contact center agents.

What if contact center agents could view their own progress in real-time? Imagine if agent quality performance could be tracked on a daily, even hourly basis and results delivered with coaching tips attached in near real time? The good news: with Scorebuddy’s dashboard, it is possible. Immediate feedback is better for the contact center agent, not to mention the contact center’s overall performance. It is a more effective way of management and gives workplace culture a boost.



Getting Performance Reviews Right

Typical performance reviews take place on a monthly or quarterly basis. In many cases, even in large contact centers an agent's performance is tied to data points collected on a spreadsheet that may not be entirely accurate, let alone timely.

Scorebuddy empowers contact center agents to be part of their own review process. They can be granted access to their review dashboard that reports back -- using factual data points -- a measure of their progress. And agents can even receive feedback as soon as an evaluation is complete.

This level of analysis and feedback is a gamechanger for the review process. It saves managers time while removing the emotional, more subjective parts of performance improvement. Because measurement is based on true data analysis it eliminates guessing or personal bias that may otherwise lead to uncomfortable conversations that waste more time. More importantly agents trust the system and have visibility of their performance before the review.

With Scorebuddy's dashboard, the data speaks for itself, so that both agents and their managers can more confidently move forward knowing what's working and what needs improvement.

The Benefits of a Quality Feedback Dashboard

By removing the guesswork and subjectivity from performance reviews, both agents and their managers save time by reflecting on more accurate data. Compared to the dated use of spreadsheets, an automated dashboard provides the following value:

- **Delivers real-time feedback to agents:** Agents have the ability to examine their own performance whenever they like, even immediately following a customer service call.
- **Saves time for managers and agents:** Managers no longer need to spend so much time preparing for performance reviews by wrestling with spreadsheets. Having a system where the scorecards, the scores, the feedback to agents as well as all of the reporting are kept in one place offers both transparency and insight into agent performance, training gaps as well as opportunities to improve.
- **Perform better, faster:** The data doesn't lie. Agents will know if they are succeeding or falling behind on a day-to-day basis, not quarterly or annually. They may choose, with the help of their managers, to adjust and learn fast what is working or not.

While the data will show overall performance, it also drills down into specific areas of the agent's job. Rather than getting nebulous feedback that might suggest "to just do better," agents will have highly specified data insights pointing them to specific areas of the job.

Bottom Line

Feedback scoring analysis goes a long way towards improving contact center agent performance and therefore the performance of the entire contact center, and while spreadsheets are in of themselves an excellent tool, they are just not suitable for this exercise. Start from within to help your agents be the best they can.

Working with transparent, readily available, performance data is a great way to show your agents that you care for their success and their growth. Empowering contact center agents to take full ownership and thereby responsibility for their own performance will no doubt result in higher levels of employee engagement.

Use data insights to build a contact center culture that is respectful and cares for its employees and watch how a nurturing attitude and positivity flow from your agents to your customers and clients.



IN CONCLUSION — KEY TAKEAWAYS

Most contact centers start life using spreadsheets to gather QA scores. We hope that through this eBook we have helped you identify the benefits of moving to a dedicated fit for purpose tool.

Here's what to consider: Look at the numbers. Know the cost-effectiveness of implementing a new system compared to the overall benefits and ROI that system will deliver to your contact center.

Investing in a purpose built quality software will:

- Help you to develop a more efficient QA process
- Reduce the significant time spent preparing for reviews and data analysis
- Help to improve performance in a controlled and consistent way
- Reduce Churn through better agent engagement
- Improve the customer experience through consistently better customer interactions

Take into account your company's growth over time, your need to share and analyze data through a process that is both scalable and capable of flexing with the changing demands of customers and the business.

Also consider the non-tangibles like workplace culture and its effect on employee engagement churn and retention.



Multichannel? Try Anychannel!

Use Scorebuddy to **Quality Assess** Calls, Chat, Email, Social Media, white-mail... anything.

www.scorebuddyqa.com

VISIT THE WEBSITE

SCOREBUDDY CORE
SCORECARDS, CALIBRATION,
COMPLIANCE, REPORTING

ANALYTICS
ADVANCED
REPORTING

AGENT INSIGHT
SUPERVISOR AND
AGENT DASHBOARDS

SURVEYS
COMBINE CSAT
AND QUALITY