Case Study

Quality Lead Customer Services, Operations and Sales Teams. How Scorebuddy Improved Quality for Permanent TSB Group

permanent tsb

One of Scorebuddy's premiere clients, permanent tsb Group, is a leading financial services provider in the Irish market. permanent tsb offers a wide range of banking products and services including online banking, savings & deposit accounts, mortgages, loans, credit cards and home insurance.

What areas of the bank are using Scorebuddy?

Scorebuddy is being used throughout the bank by Quality Assurance for both the Sales as well as Operations. It is being used by the QA functions in the banks Group Operations and is also being applied within the bank's Distribution Division, including the sales contact center and for the bank's branch networks.

Noel O'Brien manages the Quality Assurance function in the bank's Group Operations division through their Operational Excellence Center. The Quality Assurance function encompasses the back-office including the collections contact center, the main customer service contact center plus the support functions; including mortgage operations teams, legal and securities teams, the document verification unit, legal and property.

Noel agreed to be interviewed to provide us with insight as to how the bank is using Scorebuddy. Noel described the bank's usage and experience with Scorebuddy, as well as their criteria and process for selecting a quality assurance solution for the bank.

Scorebuddy
QUALITY SCORING SYSTEM
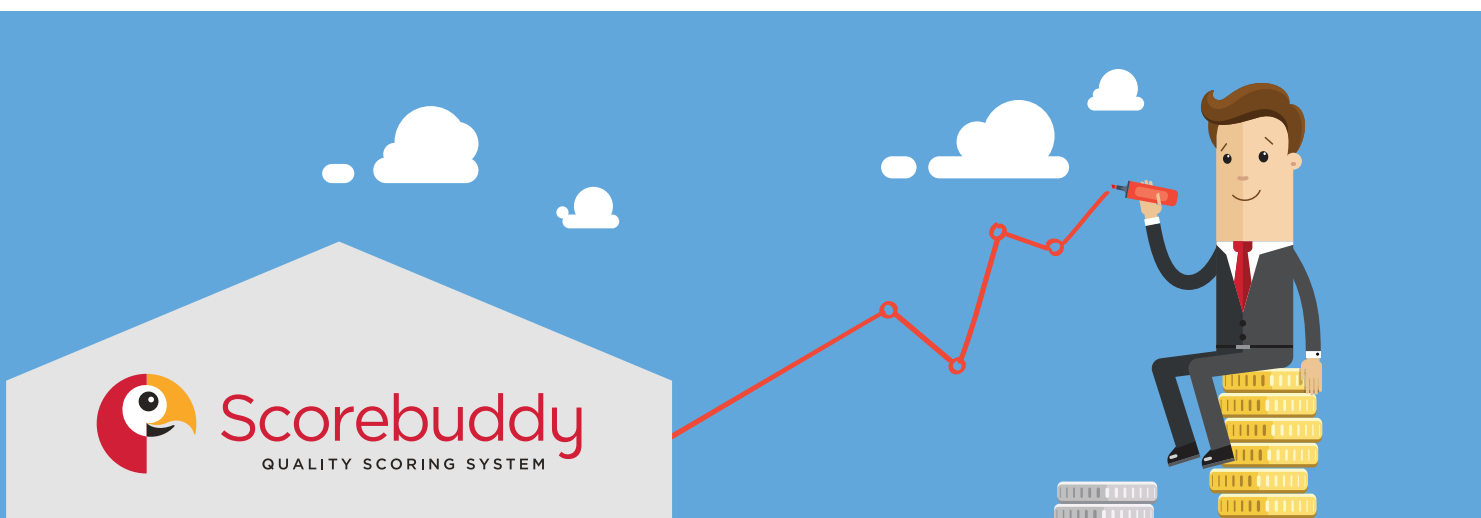
Why did the bank need a solution for QA?

Noel had worked in the call center and undertook a role to build a dedicated QA function. He is was instrumental in the selection and implementation of Scorebuddy. Scorebuddy was selected to replace both the spreadsheets that were heretofore being used, as well as to replace a solution integrated into the bank's call recording system. Neither was sufficient to deal with the growth of the QA function nor the complexities of supporting additional customer service, back office and support channels.

The use of Scorebuddy for the service contact center as well as for sales would require the measurement of quality for much more complex activities such as account opening and back office operations, that were utilizing all channels including chat, email, and social media interactions; not simply inbound or outbound calls.

Ultimately the impetus for the selection of Scorebuddy was so that the QA function throughout the bank would have one version of the truth; one system that could handle the volume and complexities of all interactions on many channels, for all business units throughout the bank to provide robust reporting back to each business unit.

One version of the truth for QA

If there is a process occurring within the back office that is being evaluated by QA, it is contained within Scorebuddy, thereby creating one version of the truth for all QA activity.

The Quality Assessment team is using Scorebuddy to build and score evaluations. Standard tests or evaluations are completed monthly—e.g., a call being handled in the call center or a complaint handling event requiring an evaluation. For each standardized test there are associated Scorebuddy scorecards.

Scorebuddy helps the bank to aggregate scorecard data and report the results of QA tests on a business unit basis; summarizing them for the respective management teams, so they have access to review the QA results for their teams. In addition, for each contact center or back office team, agents within those teams can access their individual QA results from Scorebuddy through the Agent Insight dashboard. In summary, all QA tests and evaluations reside today on Scorebuddy.

Business unit alerts for closing the gaps through coaching or training

Scorebuddy auto alerts have been customized so that each area is alerted about a less than satisfactory score; according to the severity of its potential business impact. Customer interactions and regulatory requirements are for example, high priorities.

This is followed by a notification for immediate action to remediate and track the follow up to ensure remediation occurs. In some cases one to one coaching between a team leader and agent is required. In other cases, eLearning might be used to remediate less urgent issues such as the deviation from a script or a product knowledge gap.

Overall business unit results are reported monthly and are used to drive coaching and training requirements within each business area.

In summary, Scorebuddy has been selected by this major financial services institution because of its flexibility and transparency, it's easy deployment for everything in customer service and operations, as well as its reporting capability. It is now the one place for all QA throughout the bank.

Want to learn more?

Schedule A Tour

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