
Understanding Call Center Quality Assurance Frameworks



Scorebuddy
QUALITY SCORING SYSTEM

| CONTENTS

Introduction	3
The Evolution of Call Center QA Frameworks	5
Operational Call Center QA Framework Defined	11
Tactical Call Center QA Framework Defined	16
Strategic Call Center QA Framework Defined	20
Key Takeaways	23

INTRODUCTION

When it comes to call center quality assurance, the central issue for most organizations isn't why it needs to be a focus. It's well known that the phone is considered the most frustrating customer service channel by US internet users, and it's equally well known that 40% of consumers have abandoned a company for one of their competitors due to subpar customer service. Knowing, why organizations need to focus on quality assurance for their contact centers isn't a point that inspires much doubt or debate.

Instead, what organizations should be focusing on is how to get better at assuring quality customer service. Investing in an automated call center quality assurance solution is a good start, but like any business solution, it needs to be used carefully in order to produce the best results.

This means having a plan for everything from the starting point to the metrics being tracked, the calls being monitored, and the way your agents are involved in the process. By doing so, they'll be able to reap the biggest benefits for customer experience, customer loyalty, and ultimately, the bottom line.



INTRODUCTION

It is not a secret: [contact center quality assurance measurement matters](#).

Eighty-five percent of Quality Assurance Leaders agree that evaluating agent performance and training requirements is fairly to highly impactful to contact center success. The challenge is not in knowing the importance of quality assurance, but in the process and accuracy of data collection and analysis from multiple sources.

The process of evolving from one stage of QA effectiveness to the next is what this eBook explores. It provides actionable insights and a new lens with which to understand call center quality assurance.

Call centers and quality assurance operations, metrics and data-collection are ever-evolving, and so it is helpful to think of them as overlapping stages or frameworks. A convenient way to think about these stages of evolution is: Operational, Tactical, and finally, Strategic call center frameworks.

In this paper we define and illustrate each stage with specific case study examples to make them readily accessible and understandable.

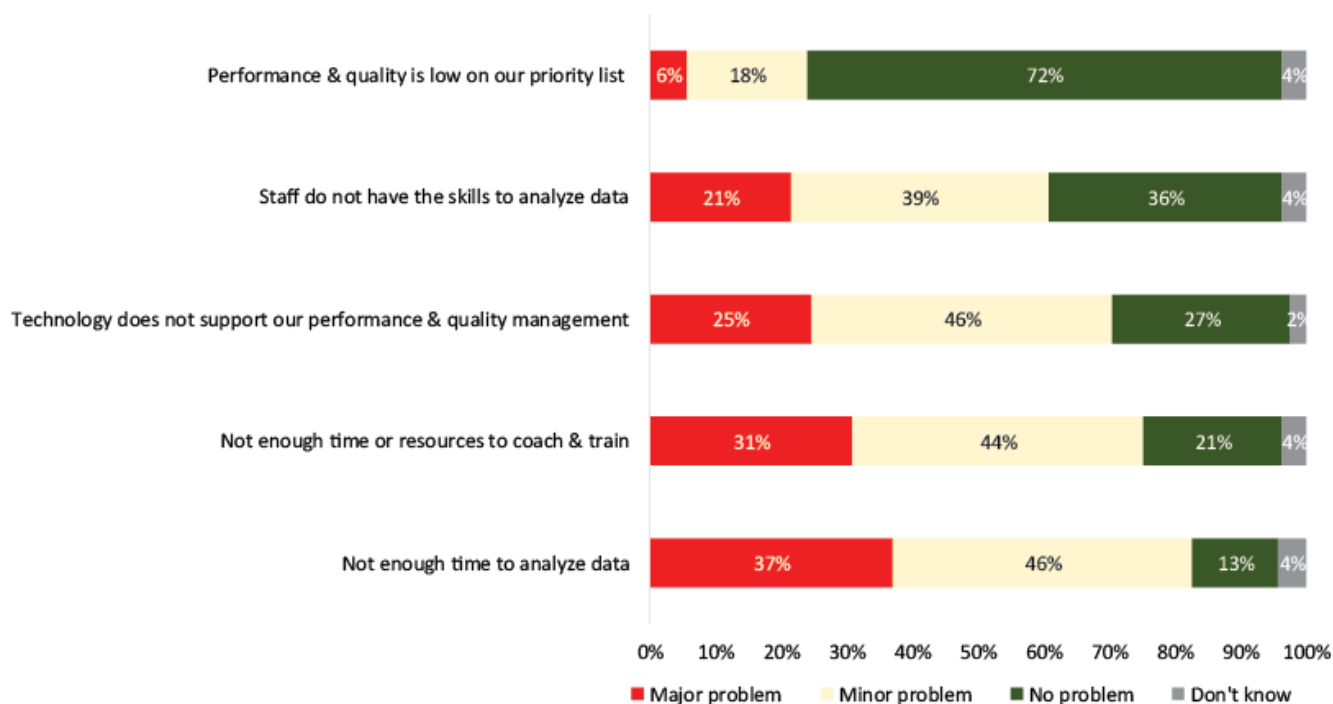
In a business based upon [human-to-human interaction](#), there is no reason data from disparate sources should overwhelm decision makers. When viewed from an overall quality assurance framework perspective, the data may be viewed in a dashboard with analytics that provide data-driven ways to help improve and to empower managers, call center employees, and clients.



EVOLVING A STRATEGIC CALL CENTER QA FRAMEWORK

There are overwhelming amounts of data points associated with call center quality monitoring and measurement. And there is no dearth of methods available by which to collect those metrics. Time and resources are scarce and, for many, quality assurance data collection technology is lagging.

CHALLENGES TO MANAGING PERFORMANCE AND QUALITY



Challenges to managing performance

Quality Assurance Managers are typically tasked with analyzing large amounts of QA metadata from both clients and callers who, to make things more complicated, often have significantly different goals. These metrics are plentiful and complex and take time to interpret and use to make actionable improvements and identify coaching opportunities. It is easy to get bogged down by seemingly endless data points from clients and callers. One QA dashboard is required to simultaneously view all essential data points at-a-glance.

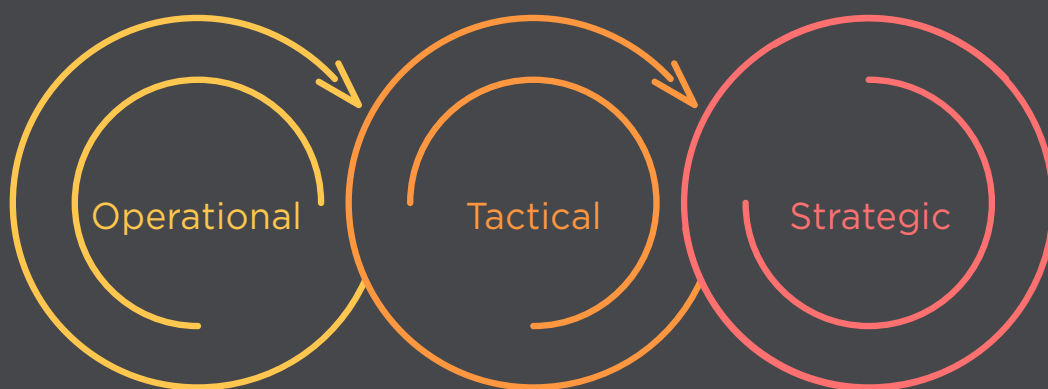
TAKING A STEP BACK — A LOOK AT THE QUALITY ASSURANCE BIG PICTURE

There are different types of call centers which vary by industry and by stages of growth. However, when examined from a top-level perspective a natural evolution is revealed. Each call center, at one time or another, fits into, transitions through, or overlaps across three QA frameworks: operational, tactical, and strategic

Understanding quality assurance through the lens of these evolutionary frameworks provides a basis from which to identify goals and pinpoint key performance

indicators, and more specifically, which of those KPIs delivers the most strategic long-term value.

With an overarching 'strategic framework' as the end goal in mind, it remains essential to embrace elements of operational and tactical frameworks which all contribute to a larger picture of success. Knowing which stage or stages your business is working through will help inform decision-making for revenue growth..



An essential starting point, an operational call center framework pertains to those aspects of quality assurance focused on improving operational goals and on process and workflows. These represent the integral nuts and bolts activities that get the job done on a day-to-day basis.

Operational quality assurance helps to improve workflow practices by:

- Maintaining consistent service delivery
- Identifying poor performers
- Measuring adherence to process and procedure

- Tracking agent development and progress

Operational quality assurance covers all of the basics and is absolutely necessary as companies begin to lay the groundwork for success in call center customer service and customer experience. While there is nothing inherently wrong with this approach to improving customer service, it is important to note that significant work may need to be done to evolve towards a more strategic quality assurance framework. However, a company, like its call center, must be fully-operational before moving on to more tactical and strategic approaches.

A tactical quality assurance framework generally addresses a company's medium-term goals, with more flexibility and foresight than operational goals. Tactical frameworks take a deeper dive into understanding the customer service experience. Tactical QA frameworks tend to be more changeable by definition.

Tactical quality assurance goals include:

- Improving client retention
- Reducing staff churn/attrition
- Identifying knowledge gaps

- Looking for the root causes of poor service
- Reporting on trends
- Aligning tightly with business goals

In this context, call center agents are encouraged to self-score their own success metrics on each of their calls, essentially acting as data collectors for Quality Assurance Leaders, who can now focus on coaching rather than merely on data collection.



Voxpro is a well-established, award winning call center with a global influence and high profile clients including Google, Stripe, and Airbnb. Voxpro was looking for a solution to their data fatigue. They were challenged by a lack of time and resources to analyze and correctly interpret large volumes of QA meta-data. In this video Kieran from Voxpro explains how call center self-assessments drove customer satisfaction (CSAT) and NPS.

A tactical framework eliminates additional layers of data by personalizing the metrics and applying it specifically to the person behind the phone.

Empowering call center employees to take ownership of their own performance tends to boost morale and reduce staff churn, but most importantly it outlines the root causes of poor service.

Once identified, these root causes may be directly addressed and improved. For example, employee self-scoring

data contrasted with caller feedback often reveals challenges in expectations. These expectation gaps are immediately identified so that action may be taken to resolve direct pain points.

Flexibility is built into this tactical framework so that it can be built upon and move towards a more strategic, big picture approach. But this stage of self-awareness and root cause identity is nevertheless an essential stepping stone in crafting an improved customer experience.

Strategic QA frameworks are focused on long-term impact and may suffer some significant growing pains before measured improvements take place. With a top-down approach, senior leadership is charged with influencing employee buy-in towards this cultural shift. While it may seem daunting, the potential wins far outweigh the stagnation of the status-quo.

- Improve Net Promoter Score (NPS)
- Increase customer loyalty
- Use QA as differentiator
- Improve propensity to purchase

Implementing a strategic framework moves the business away from quality assurance scores and focuses instead on actionable behaviors. When a call center has mastered both Operational and Tactical levels, they are ready to step away from the basics and focus on what will deliver measureable business results. It is a shift from a culture of micromanagement to one of listening, evolving, and mutual respect. In simplest terms: happier call center representatives equal happier callers.

[illegible]

Defining a Great Customer Service Experience

Clients and call center representatives alike have the same goal: To use quality assurance to achieve strategic goals and drive positive customer service experience.

When call center representatives are asked to describe a great customer experience in three words, the predominant choices include: consistent,

needs and expectations.

Consider your own call center model and think about where it may fit within these overlapping frameworks. Knowing where you are on that is essential in determining where you are heading and how you wish to successfully get you and your team from 'always the same' to 'always evolving.'

Defining the Operational Call Center QA Framework

An essential starting point upon which to build exists within the core of every call center. Process and workflows are the operational framework of the call center. So, when we reference the operational aspects of a given call center, we are speaking to the day-to-day, nuts and bolts of getting the job done in the most immediate-term. These are the decisions and actions that inform getting from point A to point B in the most efficient and customer-centric way possible.

Call centers that are working within the

operational QA framework typically employ the following processes:

- Measure QA as part of the daily operation
- Develop a QA framework with a primary function of identifying poor performers
- Complete a quota of scores by staff per month
- Perform evaluations by team leaders that are reviewed monthly

OPERATIONAL QUALITY ASSURANCE GOALS

There are four pillars of operational quality assurance that work to measure and ultimately improve call center process and workflow practices. Of course there are challenges within each, but understanding these issues is exactly what helps to evolve the framework and to build more tactical and strategic QA frameworks down the line.

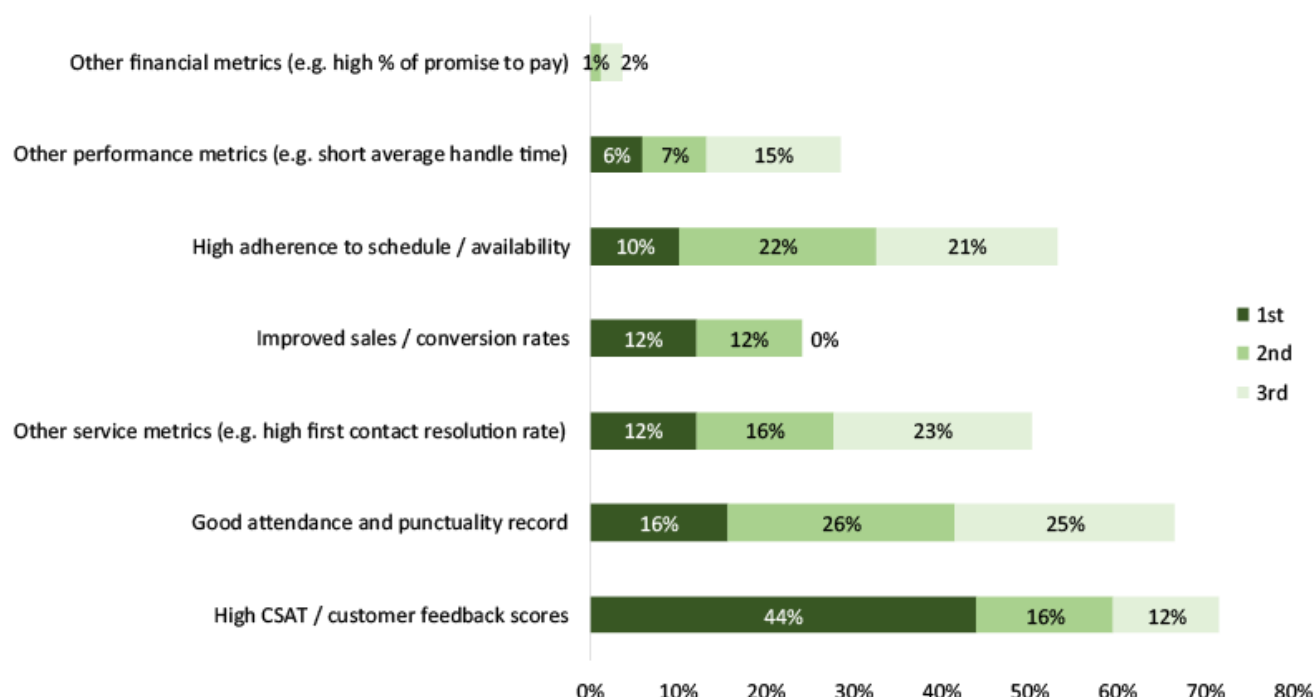
1 Maintain consistent service delivery

Consistency is key in most industries and functions, but especially important when managing the personalized level of service call centers demand their employees deliver on a regular basis. And yet, CSAT (customer satisfaction) tops the list as an area where most call centers feel they need the most improvement. In fact, the focus on CSAT improvement is a staggering; 32% higher than sales and conversion rates.

High customer feedback scores are what matter most to call centers and they are also one of the most difficult areas in which to achieve consistency.

FOCUS ON IMPROVEMENTS

What are the top three characteristics you would like to improve?



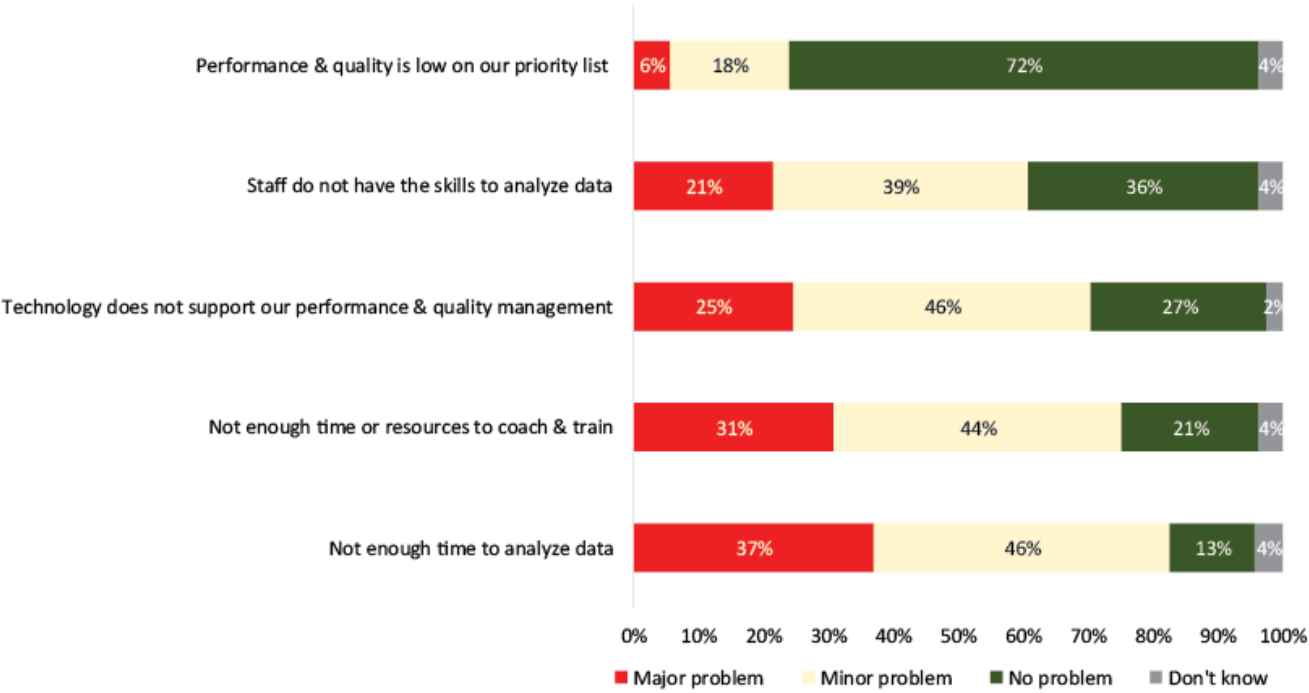
Consistency can easily become one of the more subjective data points to measure, particularly within an operational framework where importance is placed on fulfilling a quota of monthly scores and on identifying poor performers. We must first define what is meant by “consistent service delivery” and then benchmark attainable consistent data points that are not only measurable, but easily translatable to Quality Assurance Leaders, and shareable with their teams.

2 Identify poor performers

Identifying poor performers seems like a noble effort, but in truth, within an operational framework little time is available to effectively manage performance and quality. While these metrics and their follow-through actions remain an important goal, most call center managers agree that “there is not enough time to analyze data” nor is there “time or resources available to coach and train.”

Call center quality assurance data exists, but it is not easily translatable or streamlined in a way that results in resource-driven measurements for appropriate identification or coaching. Twenty-five percent (25%) of Quality Assurance Leaders agree that when it comes to performance management, call center technology is a problem.

CHALLENGES TO MANAGING PERFORMANCE AND QUALITY

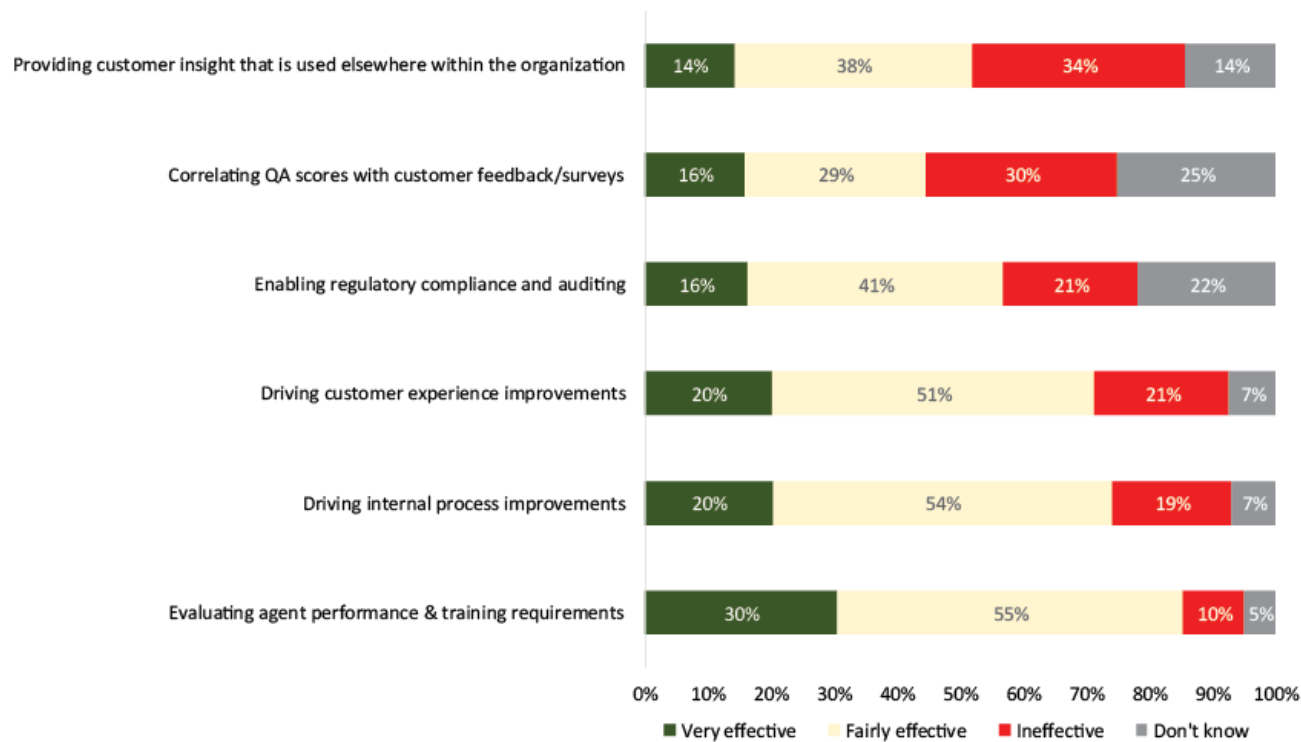


Once a poor performer is identified, the remaining challenge is to understand the ‘root cause’ of why they are poorly performing and how to coach for greater success.

3 Measure adherence to process and procedure

Measuring the overall impact of a call center’s process and procedures is meaningful at all stages of the call center’s development, but particularly as it shifts to higher growth phases. Unfortunately, 55% of call centers polled admit that they do not know if their quality assurance scores align with their customer feedback and CSAT scores.

HOW IMPACTFUL IS QUALITY ASSURANCE IN YOUR CONTACT CENTER?



Meanwhile 48% do not know if any collected customer insights are shared elsewhere within their respective organization. This means that the call center, where employees are closest to understanding what customers think and feel, is not sharing any of these key learnings with other departmental organizations.

While process and procedure adherence may be measurable, it is not especially useful if little or no action is taken based on the learned results. This makes the metrics less meaningful, potentially resulting in a cycle of poor or inconsistent data collection.

4 Track agent development and progress

Monthly quota-based tracking checks the box when it comes to tracking agent development and progress, but it is not a clear and effective way to coach or motivate employees. These data points are often convoluted and there is rarely time to analyze results with any in-depth to look into what may really be going on.

With most call centers unable to identify poor call center performers it may come

as no surprise that tracking agent progress also presents a challenge. Time is scarce for analysis and dedicated coaching is often under-resourced. Quality Assurance Team Leaders are often performing evaluations that are reviewed on a monthly basis. With much of this time spent on poor performer identification, it remains a challenge to focus on rewarding agent progress or analyzing how agent development affects the greater good.

Looking Forward to Tactical and Strategic Frameworks

While quality assurance measurement exists through operational frameworks, there are seemingly countless missed growth opportunities. An operationally-focused call center needs to be concerned with daily tasks, workflows, and processes. But as innovations in live web chat and social media customer care continue to trend upward, call centers working within a strictly operational framework will not be able to keep up.

It is best practice to consider call center quality assurance as an evolution from operational to tactical to strategic. The processes and workflows in an operational framework are absolutely essential to call center success. This day-to-day, short term decision-making is what begins to support the grander scheme tactical and strategic approaches we discuss next.

Defining the Tactical Call Center QA Framework

In sports, tactics are plans made before the start of a game, to play against your opponent's weaknesses and to your team's strengths.

We prefer the more managerial definition; Tactics are the actual means used to gain a business objective.

What it means to have a Tactical QA Framework Approach

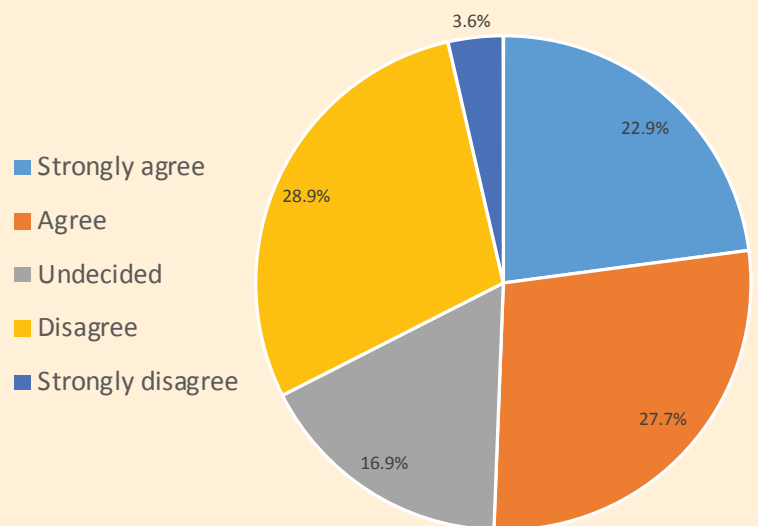
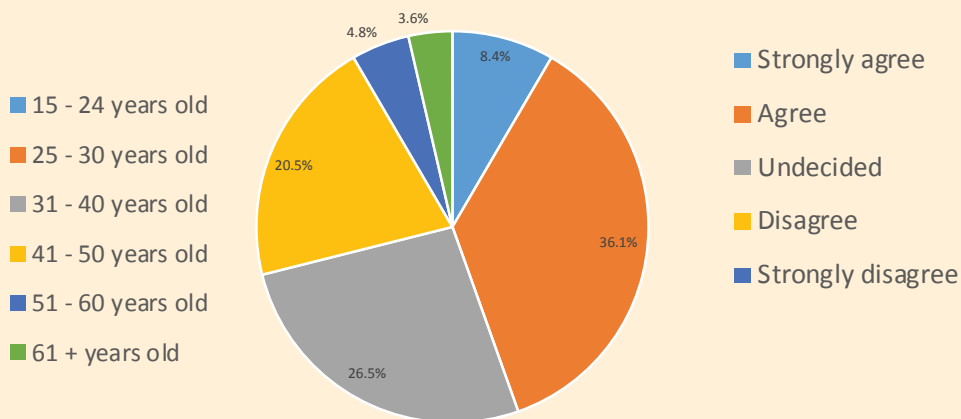
As business and by extension, the supporting call centers mature, they naturally evolve from operational to tactical to strategic frameworks. To clarify, we must recognize that all centers — there are upwards of 45,000 in the US alone — as they mature will need to align (at least some aspects of their business) with a tactical QA framework approach.

Specifically, a call center taking a tactical QA framework approach is typically focused on the following more changeable

aspects of measuring call center success:

- QA goals more often than not reflect medium-term business goals
- QA is used as a method for identifying process or service improvements which are then adopted and implemented
- QA processes, workflows, and wins are used to sell business
- QA evaluations are pushed to agents in real-time

A business should **respond to me** 24 hours a day, 7 days a week



10 PREDICTIONS FOR 2017

 brainfood

In the midst of so much call center technological innovation with strides in artificial intelligence, live chat, social media customer service efforts, and mobile-readiness, call centers must be fast to adapt. Customer expectations are exceedingly high and getting higher.

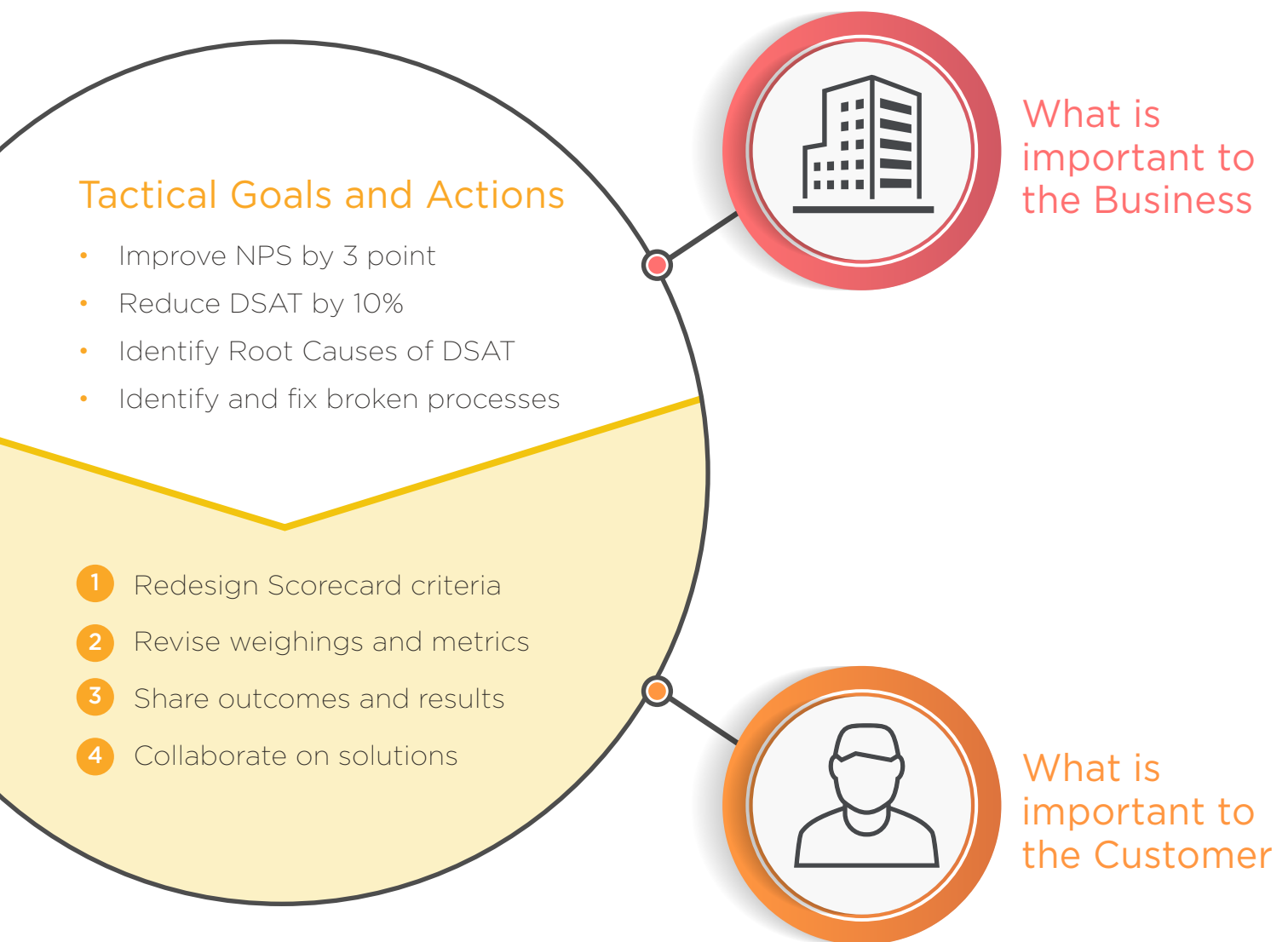
In this [10 Predictions for 2017](#) study by Brainfood, consultant Martin-Hill Wilson

points out that a growing portion of customers agree or strongly agree that a business should respond or be available 24 hours a day, seven days a week.

It may be useful to keep this in mind as we review call center QA tactical frameworks and look towards a larger goal-oriented picture.

A TACTICAL THOUGHT PROCESS

Moving from operational to tactical means the internal conversation has to change. The diagram below illustrates the typical thought process that you need to go through when redesigning your QA framework.



UNDERSTANDING CALL CENTER QA TACTICAL GOALS

More in-depth than operational call center QA goals, Tactical goals, for example, are focused much more on growth and scalability than on processes and workflows.

1 Improve client retention

Not only does a tactical framework demand consistent service delivery, but a level of quality service that results in higher client retention.

2 Reduce staff churn

Reducing staff churn saves on invested time and dollars in staff training and development, and ultimately assists in maintaining a healthy client retention rate. A tactical framework points to call agent self-scoring as a method of getting to the root cause of an issue (see #4) while empowering employees with self-awareness and a weighted say in why and how a call succeeds or fails.

As expressed in a [case study with Voxpro](#), staff agents tend to be more motivated when data measures success against more specific KPIs and can more fluidly inform direction shifts towards meaningful goals.

3 Identify knowledge gaps

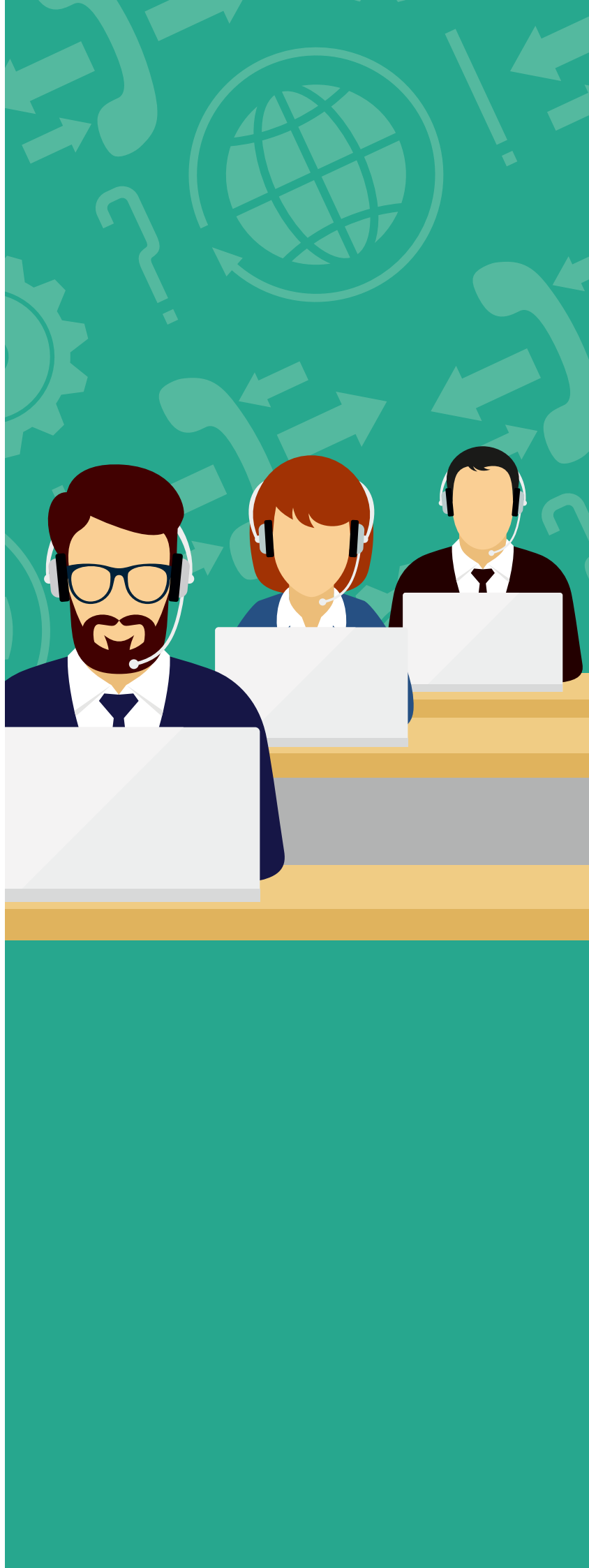
With an ability to look and see beyond the day-to-day process, a tactical framework lens enables Quality Assurance Leaders and others to do the job of using metrics to pinpoint specific knowledge gaps. These gaps may be found in the call center employee knowledge base, or reach as far as enterprise-wide product and service issues. Tactical frameworks begin to open this communication channel so that call centers can function as a more holistic part of the client's business by identifying knowledge gaps and raising trending call concerns through the ranks.

4 Look for the root causes of poor service

Rather than merely identifying poor performers based on somewhat subjective data points, a tactical call center QA approach digs deeper into identifying and understanding the true root cause of poor service. With a focus on the quality of the service rather than on the individual performer, the idea is to strengthen and empower employees through coaching and progress, ultimately reducing staff churn and improving the customer experience.

5 Report on trends

With a focus on month-over-month, or year-over-year data, tactical pivots can and should be made. By collating trending data as opposed to one-off data points or subjective data collection, Quality Assurance Managers can make more informed decisions.



CALL CENTER QA TACTICAL FRAMEWORKS AT WORK: A VOXPRO CASE STUDY

A firm that has shifted to a QA Tactical framework is illustrated in our customer example and Voxpro case study.

Voxpro is a well-established, award winning call center with a global influence and high profile clients including Google, Stripe, and Airbnb. Voxpro was looking for a solution to their data fatigue. They were challenged by a lack of time and resources to analyze and correctly interpret large volumes of QA meta-data.

The end goal at Voxpro was to evolve from an operational (process and workflow-oriented) framework to a framework that is tactical (changeable and flexible). The Voxpro plan involved working to:

- Obtain a unified QA dashboard view of all pertinent analytics

- Gain the ability to analyze the data in real-time
- Implement new concepts of self-scoring and self-awareness for call center agents.

With these tactical goals at the fore, Voxpro identified exactly how a streamlined data solution could help them grow and improve. This is a solid outline for any call center also suffering from an abundance of metadata and interested in evolving toward a tactical or even strategic way of doing business.

The Voxpro success story continues with increased growth, higher customer satisfaction (CSAT) scores, reduced employee churn, as well as root cause identification.

Kieren McCarthy, Head of Quality at Voxpro, summarizes his team's tactical QA framework success and how he plans to build upon this into a strategic framework.



NEXT STEPS: FROM A TACTICAL TO A STRATEGIC QA FRAMEWORK

In the Voxpro case study example, we learn how flexible, medium-term business goals lead to greater client retention and higher CSAT scores while improving employee turnover. Pockets of value are uncovered by identifying knowledge gaps and taking action to improve communications. Even QA processes begin to be less cumbersome as metrics shift to a call

center agent self-scoring process.

Evolving from a catch-as-catch-can approach within an [operational framework of process and workflows](#), heading to a more tactically-influenced mindset, opens significant opportunities for continued growth through the strategic framework we explore in our next chapter.

Defining the Strategic Call Center QA Framework

The end goal for ultimate call center QA efficiency is to be working within a strategic QA framework. This approach takes into account all critical influences — the business, the customer, the client, and the agent — and aims to seamlessly set the standards, measure and collaborate across these partnerships.

Call centers that adhere to strategic QA frameworks are designed to deliver on the businesses' strategic objectives and goals. They are structured to analyze, interpret, and share data that may result in actions that drastically depart from previous

operational practices. Because this highest level QA format is focused on long-term impact, it must necessarily be facilitated by a top-down approach.

Senior leadership is charged with influencing employee buy-in towards the potential cultural shifts that may come about due to key data findings. They are rewarded as top-notch; QA (and the data associated therein) becomes a key differentiator and selling point responsible for significant revenue growth and delivering real shareholder value.

Working within the strategic QA framework focuses on the following processes:

- Correlating and understanding the connection between Customer Experience, Customer Sentiment, and QA.
- Considering and reviewing QA from positions of senior leadership, or on the executive board level.
- Evaluating consistent QA as a senior management key performance indicator (KPI).
- Encouraging call center agents to score themselves as a way to raise levels of self-awareness, and adopt customer positive behaviors.



A visual representation of strategic thinking at work. Discover how higher level strategic partnerships emerge and how quality is driven with this Strategic Quality Framework chart by Martin-Hill Wilson, the founder of customer service and customer experience consultancy, [Brainfood](#).

STRATEGIC QUALITY ASSURANCE GOALS

While it may seem as though strategic-oriented frameworks enable call center employees and team leaders the luxury of stepping back to philosophically address the bigger picture, this is not the case. Yes, more time is certainly dedicated to longer-term thinking, but big organizational changes are often necessary as a means to experience growth, consistently high net promoter scores, and increased returns-on-investment. The question is whether the QA Framework is seen as capable of moving the needle on these headline KPIs?

1 Improve Net Promoter Score (NPS)

Net Promoter Score goes a few steps beyond CSAT as it focuses on how a customer might promote, or recommend a given call center's services. On a scale of zero to ten, only an NPS score of nine or ten qualify as a "promoter." Promoters are the goal; they are the ones most likely to spread the good word about a company or call center. The others classified as either "passives" or "detractors," and as their names suggest, are not very helpful.

2 Increase customer loyalty

Customer loyalty metrics look beyond first-time callers and one-off interactions and focus instead on repeat business rates. Knowing who these people are, where they are coming from, and why they continue to come back, proves to be invaluable client and call center information.

3 Use QA as a key differentiator

As QA data collection and the streamlining of data interpretation improve, QA shifts from a poor performer identifier in an operational framework to a selling point to potential clients in a strategic framework.

4 Improve the propensity to purchase

The end goal is to increase sales. While operational QA frameworks are concerned with providing consistent service, a strategic approach is to examine how that service is impacting a customer or potential customer's propensity to purchase.

How to Become a More Strategic Call Center – ‘Always the Same’ to ‘Always Evolving’

First, identify under which framework your call center currently exists: operational, tactical, or strategic. Next, be certain your call center is prepared to evolve to the next framework. Strategic, for example, requires the cooperation of senior leadership, so make sure the key players are aligned in their focus on growth. Remember also that call centers rarely, if ever, fall exclusively under one framework and that these are constantly shifting and overlapping constructs.

While working with a strategic framework is a call center's ultimate goal, there is important work to be done within the stages of operational and tactical development. Identify where you are and take action.

KEY TAKEAWAYS

Customer service remains a fast-growing aspect of most businesses and an industry that continues to become more and more influential to business growth, customer retention, and brand loyalty. How we measure that service and take action to improve its results, is critical to implementing data-driven improvements and driving revenue increases.

While there are varying degrees of what defines data-driven success, we know that a strategic QA call center framework aims specifically at:

- Improving Net Promoter Score (NPS)
- Increasing customer loyalty
- Using QA as a differentiator
- Improving a client's propensity to purchase

Measurement goals ensure that data is grounded and meaningful. These goals will not be immediately met, but when envisioned as an evolutionary process, the journey to getting there may be more impactful.

Braindfood's Martin H. Wilson shares some valuable insights in moving towards a strategic framework. In his recent study, "Setting Your Customer Service Strategy," Wilson suggests shifting the following operationally-focused call center ideas to ones of greater impact and significance. He encourages call centers to move from regimented thinking to a more creative approach

- From Scores to Agent Behaviors
- From Telling to Learning
- From Micro-Management to Mutual Respect
- From Assuming to Listening
- From 'Always the Same' to 'Always Evolving'

There are 41,500 call centers in the US alone where call center operations are forecasted to create 365,000 new jobs in the next four years. Competition continues to rise along with innovative strides in customer service surrounding AI, live chat, and voice interfaces.

Evolving from 'always the same' to 'always evolving' is the future of call center QA. While it is expected that call center leaders may find themselves engaged in different points along the quality assurance journey, to refuse to evolve in this fast-growing industry is failure. To evolve through operational, tactical, and strategic frameworks can point you toward greater success.



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