CallMiner

The Contact Center QA "X Factor"

How to Drive Business Results with Automated and Hybrid Quality Assurance

Learn why CallMiner was named
the Leader in The Forrester Wave™:
Conversation Intelligence for
Customer Service, Q3 2023

Introduction

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A positive customer experience (CX) can be a major competitive differentiator. According to recent **PWC research**, 1 in 3 customers would walk away from a brand they love after just one bad experience. On the other hand, organizations that deliver great customer experiences can charge a 16% premium to their customers, while still maintaining customer loyalty.

At the same time, employee experience (EX) is paramount, especially in historically high-turnover industries like the contact center. According to the 2022 **CallMiner CX Landscape Report**, 99% of senior contact center decision-makers understand that EX is important to CX. Retaining top performers and providing proper coaching and training opportunities can not only save costs, but also improve both the employee and customer experience.

So, how do you maintain customer-centric standards around contact center quality, with an eye toward EX? Quality assurance (QA) and quality monitoring (QM) are some of the most important tools for contact center management. But today, most organizations have a large disparity between the number of QA analysts and contact center agents.

This means QA is predominantly done via manual reviews for a random sample of interactions. Typical QA analysts can often only listen to **3 to 5 random calls** per agent, per month — less than 1% of overall interactions. What about the other 99% of customer interactions? Plus, manual listening takes time that could be spent upskilling analysts or redeploying them in more strategic areas.

Even so, it's impossible to fully automate QA overnight, nor should you focus on that as a goal. On the journey toward automated QA, organizations should strive towards automating step by step, or taking a hybrid approach— retaining certain manual processes, while achieving quick wins, measuring success, and expanding from there.

Certain facets of CX will always demand the human touch. Achieving the QA 'X factor' requires focusing on how to appropriately deploy AI and automated or hybrid QA to support your business where it is today, as well as drive toward a cycle of continuous CX improvement.

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An AI-forward approach to quality monitoring

For most organizations, 100% QA automation is not a realistic goal. Some subjective scores such as the perception of an agent's friendliness or professionalism should involve human empathy and understanding, which can never be fully automated. With that said, partial or hybrid automation can help your QA analysts and supervisors focus on the important things, such as targeted agent coaching and training.

Many aspects of QA can be automated with technology like AI-powered conversation intelligence to drive toward a process of continuous improvement. These initiatives don't necessarily need to happen all at once. Instead, you can prioritize what to focus on based on business objectives. Here are a few ideas to get you started.

Achieving quality, process adherence and compliance goals via consistent monitoring of all omnichannel interactions

Conversation intelligence monitors and analyzes 100% of omnichannel interactions. Whether it's in real time or post-interaction, analytics can help you understand every part of the conversation versus just the keywords. The result is actionable insights presented via a dashboard with customizable scorecard metrics.

Quality metrics from conversation intelligence systems enable contact centers to identify exactly where agents need help, and continuously measure progress across key performance indicators (KPIs). Quality supervisors can make informed, data-driven decisions when it comes to process adherence, compliance, and need for supplemental coaching or training. Automated scorecards can save hours of "needle in a haystack" searching through millions of interactions by quickly retrieving exact examples of an agent's behavior in seconds.

Automation, whether it's full or hybrid, can make components like compliance and process adherence easier to manage, particularly for highly regulated industries like collections and healthcare. Here's how one organization uses conversation intelligence to increase revenue collection and accelerate agent development.

How State Collection Service leverages conversation intelligence for continuous improvement

Healthcare receivables organization, State Collection Service, Inc. (SCSI), manages four contact centers that employ 600 agents, serving over 280 hospitals and 80 physician groups nationwide. Before deploying conversation intelligence, SCSI used random call sampling and scoring processes to measure CX improvements and compliance objectives.

After implementing conversation intelligence, robust insights and targeted agent coaching enabled the company to achieve significant improvements. In the year after implementation, SCSI increased monthly average revenue per agent, while reducing average silence by 12% per call, and improving first call resolution (FCR) rates by 23%. And, because supervisors and quality analysts no longer spend hours analyzing the calls, SCSI saves an equivalent of 4,000 full-time QA hours.

The team leverages conversation intelligence in a variety of ways, including:

- **Automating QA with agent scorecards:** Conversation intelligence enables SCSI to access all the benefits of the insight provided by analyzing 100% of its interactions with patients. To assess its agents' performance more fairly, the company migrated to automated scorecards, reducing manual discrepancies and giving agents personalized feedback daily.

- **Targeting coaching:** Automating scorecards allows supervisors to evaluate agents more objectively and effectively, freeing up QA hours for targeted coaching and training when it's needed most.

- **Measuring compliance and collections effectiveness:** Conversation intelligence scores agents on how well they are following the correct call structure and compliant language, such as: patient identification; Mini Miranda disclosure; and most importantly, financial negotiations with patients.

- **Providing real-time feedback for agents:** Rather than relying on post-call analysis alone, the conversation intelligence system can alert agents with real-time guidance to both prompt corrective action and reward positive behaviors, such as the use of compliant language.

Read the **full case study here**.

Driving business transformation goals through strategic alignment with contact center KPIs

It can be hard, if not impossible to accurately measure contact center KPIs without analyzing 100% of your omnichannel interactions. Some of the most important metrics that can hint at the quality (or lack thereof) of your company's service are:

- **Abandon rate**
- **Average talk time**
- **Cost per call**
- **Net Promoter Score (NPS)**
- **Average handle time**
- **First call resolution**
- **Customer satisfaction score (CSAT)**
- **Call quality**
- **Occupancy rate**
- **Attrition and absenteeism**
- **Customer effort score (CES)**

Yet, with so many metrics, supervisors and agents can often lose sight of what is really important and focus on the wrong things during an interaction. Automated scorecards allow supervisors to zero in on areas that actually need improvement, based on real data and not assumptions.

For example, a contact center agent may have lightning-fast average talk time, but they may also be transferring your customers to other agents (which would be visible from first call resolution rate). Or they may make customers feel rushed, versus heard and understood for their reason for calling in. It's also critical to align contact center KPIs with business improvement initiatives. Agents are on the front lines of customer feedback – appropriately leveraging contact center data to drive business improvements is a way to take your quality monitoring and measurement strategy to the next level.

Let's look at how one organization used QA metrics to fuel digital transformation. →

Teleperformance taps QA insights to meet airline client's digital transformation goals

Before implementing conversation intelligence, Teleperformance, a business process outsourcer (BPO), worked with a major airline that was only able to randomly sample 2-3% of customer interactions. Trying to define trends and potential areas for improvement from such a small pool limited the impact of certain business decisions.

However, once the airline migrated to automated QA, with the help of CallMiner, the Teleperformance team could automatically monitor, score and tag voice and web chats. This process led to the team finding business improvement opportunities for the airline client, resulting in $500,000 in annual savings.

For example, analyzing 100% of interactions revealed the airline had to change its IVR options and add informative text on its website, resulting in a 50% reduction in calls to contact centers. This root cause analysis covered not only contact centers, but also web and in-person interactions, as well.

The newly implemented automated QA process now enables supervisors to have a precise coaching plan towards agents. Automated QA means managers can quickly identify specific contacts and pinpoint language (e.g. script compliance, regulatory compliance, complaints, closing language) within the call recording and transcript.

In addition, analytics-based reporting shows baseline performance levels, trends and identifies specific agents that need additional training. Figuring out what agents need to do better was taken out of the supervisors' responsibilities, allowing them an average of 12 hours more a month to apply to actually coaching agents. Now first call resolution (FCR) is up and call transfers are down, demonstrating that the increased coaching has added value to call center operations.

Together, Teleperformance and CallMiner maximized the airline's analytics and customer journey.

Improving agent satisfaction, retention and CX through data-driven agent coaching and training

As we've seen through some of the examples above, one high-impact tool is automated scorecards. These can be used as a first step in implementing a data-driven, **hybrid coaching** program.

Automated scorecards provide agents with consistent feedback on all interactions, not just random samples or the shortest calls. As an added benefit, automation uses significantly fewer QA analysis resources. Conversation intelligence does the listening and provides data that can be used to emphasise both positive interactions, as well as provide coaching where agents need improvement.

In addition, scorecards enable quality supervisors to define the measurement criteria based on your enterprise initiatives. Some examples might include evaluating sales and marketing effectiveness (cross-selling, customer retention practices, response to competitor mentions, ability to soothe an angry customer) and then measuring performance against these metrics on a caller, group or complete contact centre basis.

On top of evaluating individual agent performance, a dashboard scorecard could provide a view into how an entire team is performing across designated categories. Once a baseline is set, supervisors can easily uncover that a group of agents needs coaching on arranging call backs or taking ownership over situations, which would indicate potential process problems. Armed with this data, your supervisors can spend more time coaching and less time consumed with administrative work, leading to happier agents, better performance, and lower turnover.

The same scorecards could also provide a total composite score for each agent, along with other metrics such as number of calls handled and average length of calls. From there, agents can view their own customised dashboard of how well they are performing against the metrics as compared to other team members. These metrics can encourage healthy competition or gamification, as well as fuel incentive and bonus programs.

Gant Travel improves agent coaching and supervisor consistency

Gant Travel provides business and corporate travel management to small and mid-sized companies. Gant Travel's commitment to continuous service and superior CX led them to explore automating QA processes. Previously, the company was only able to monitor 2% of its interactions, making it difficult to accurately measure performance or effectively coach agents.

In addition, Gant Travel was facing the challenge of inaccurate or incomplete dispositions. They simply did not have the resources necessary to listen to the number of calls it would take to understand why customers were calling in the first place. Other issues included a lack of data regarding silence on calls, an effective feedback loop with agents and supervisors, and a reporting mechanism to keep executive management informed about performance and productivity improvements.

Prior to conversation intelligence, supervisors spent an hour on each call monitored – locating the call, listening to it and filling out the QA scorecard. They also addressed disputed quality scores, which equated to approximately 20% additional rework. At this rate, Gant Travel was only able to QA two to five calls per agent per month. With CallMiner, Gant Travel has redirected supervisors' time and the frequency of feedback by 400%.

Overall, embracing automated QA monitoring helped the team standardize and drive consistency, improve training, and relay critical information back to its customers. The ROI of conversation intelligence versus manual monitoring has been a no-brainer. The Gant Travel team has cascaded information vertically and horizontally in the organization – including sharing valuable intel with their clients about trends in customer behaviors.

Hear more from Gant Travel here.

Strategically allocating and upskilling QA talent

One of the most exciting aspects of automating QA, whether it's hybrid or full, is effectively **upskilling human talent** and applying efforts toward your strategic goals. Removing employees from repetitive tasks provides more fulfilling career opportunities for the QA discipline, giving these critical employees a concrete development plan. Maximizing this existing talent can drive cross-functional business improvements.

Here are a few examples of how QA talent can be strategically allocated and upskilled. With rapidly emerging **compliance and risk management requirements**, more talent is needed to ensure organizations are focused on effectively serving vulnerable customers. Rather than QA monitoring alone, supervisors' time could be reallocated toward helping agents achieve a higher degree of empathy, along with careful attention to detail to ensure that compliance objectives are met.

In addition, the analytics talent used in QA can be applied to other areas of the business. For example, analysts can share contact center data cross-functionally to drive more effective sales and marketing programs. Here's how one organization used conversation intelligence from the contact center to upskill employees and drive cross-functional business improvements.
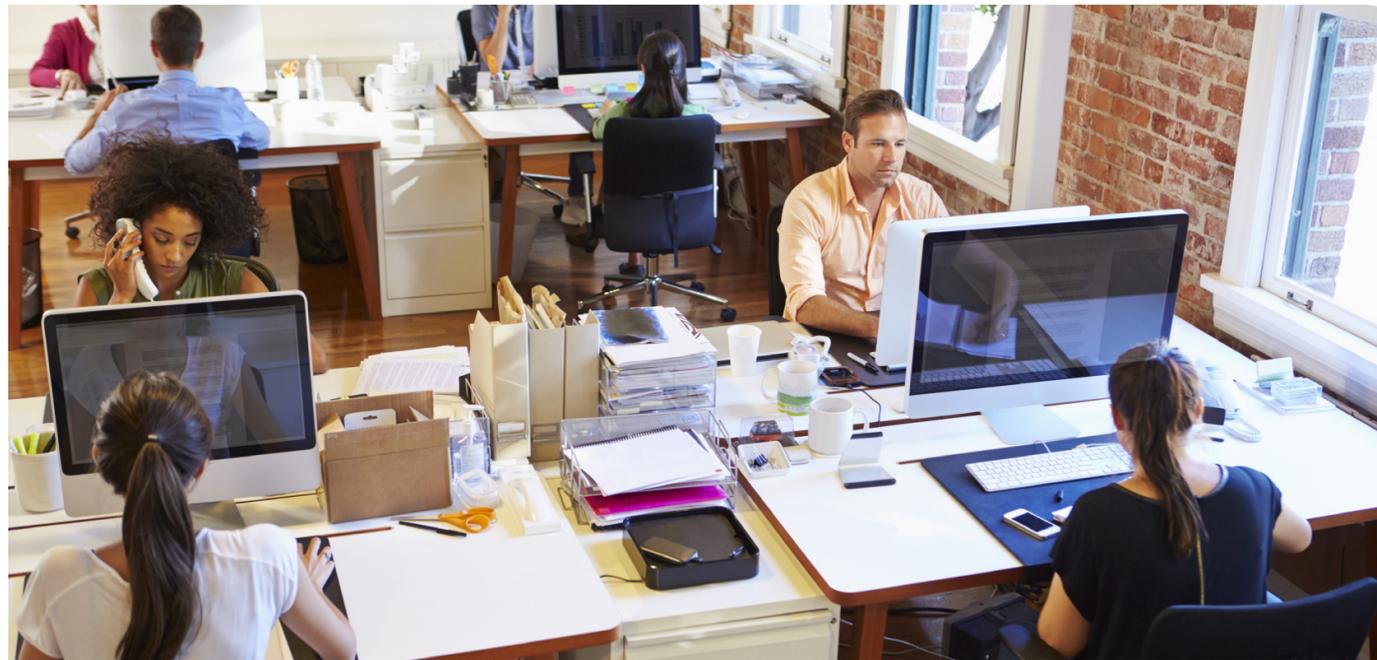
How Qualfon uses conversation intelligence data with cross-functional teams

Qualfon has a rigorous ongoing quality improvement process, and leverages conversation intelligence to boost sales, coach its agents and make meaningful improvements to its operations.

As a BPO, Qualfon represents more than 200 brands and has extensive contact center operations with well-documented procedures. Prior to implementing conversation intelligence technology, it was challenging to track agent adherence to certain procedures and provide performance feedback in a timely manner.

In addition, many Qualfon agents focus on sales for their clients and receive commission for certain accounts. As part of an effort to continuously improve the sales process, the company transitioned to a consultative selling approach focused on agents acting more like advisors than salespeople and providing recommendations to prospects based on their specific needs.

The Qualfon team implemented a process of continuous improvement, starting with the parts of a call that could effectively be measured with conversation intelligence. Agent scorecards and other insights became an extremely valuable part of Qualfon's ongoing quality efforts.

Using agent performance scorecards, the sales team can see who is performing the strongest based on proven sales principles. By quickly focusing on issues with targeted coaching, the team has experienced near-immediate improvements that show up the next day in agents' sales numbers. Over time, the team has achieved over 95% accuracy on these scorecards, making them a valuable resource for evaluations.

Qualfon continues to explore more ways to use AI-driven analysis across different departments to improve CX. For example, the marketing team leverages conversation intelligence data to understand customers' most frequently asked questions. Using this information, the team can design more effective campaigns that proactively address these questions and clarify confusion around issues such as pricing.

Learn more about Qualfon's automated QA efforts.

Embracing an automated or hybrid QA journey

The effective use of conversation intelligence in automated QA doesn't have to be an all or nothing approach. You can start by using automation to monitor compliance and process adherence at the baseline, while using CallMiner to continue to score other areas manually. From there, automated scorecards can drive a more effective coaching and training program. Over time, your organization can accelerate toward a vision of sharing data cross-functionally to drive business improvements.

Keep in mind that automating QA is a continuous process, not a one-shot effort. And it's possible you'll find a hybrid approach to QA that delivers the long-term outcomes you're looking for. The true QA 'X factor' is using your human talent to evaluate the results of automated outputs to drive continuous learning and improvement.

The case study examples in this guide provide real-world inspiration on how to drive QA efficiency and effectiveness, agent satisfaction and retention, as well as CX and business improvements. The results of ongoing, measured efforts include happier employees, lower costs, increased compliance, and satisfied customers that drive long-term growth.

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About CallMiner

CallMiner is the global leader in conversation intelligence to drive business performance improvement. Powered by artificial intelligence and machine learning, CallMiner delivers the industry's most comprehensive platform to analyze omnichannel customer interactions at scale, allowing organizations to interpret sentiment and identify patterns to reveal deep understanding from every conversation.

By connecting the dots between insights and action, CallMiner enables companies to identify areas of opportunity to drive business improvement, growth and transformational change more effectively than ever before. CallMiner is trusted by the world's leading organizations across retail, financial services, healthcare and insurance, travel and hospitality, and more.

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