



From Agent Performance to Business Optimization

The Evolution of Contact Center Quality Management



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Quality management systems have evolved over the years resulting in huge increases in the efficiency and effectiveness of monitoring and managing agent performance. That's where the evolution seems to have stalled, with today's quality management systems focusing more on individual agent performance than on overall business performance. A new concept of quality management is emerging. One that embeds the time-tested principles of the performance improvement process, and layers on top innovative analytics capabilities. This new approach aligns the efforts of the contact center with the strategic objectives of the business. As such, it presents an opportunity to transform quality management into a powerful business optimization solution.

Quality Management – A Historical Perspective

Quality management first appeared about 200 years ago during the industrial revolution when a supervisor inspected the work of a laborer and decided to accept or reject their effort. In the 1960s the Japanese manufacturing sector refined the concept with the help of early quality pioneers such as Juran and Deming. A key notion they introduced was the quality process, a methodology that is really pretty intuitive, but very powerful when applied correctly—monitor performance, identify gaps, undertake corrective action and repeat.

That process is still the underlying basis of today's quality management efforts in the contact center. The enabling technology has changed substantially though, from the early days of side-by-side monitoring and paper evaluation forms. Tape recorders eventually replaced live monitoring, and spreadsheets were used to enter scores and produce reports. These first steps at automation made the quality management process more efficient and more useful to the business.

In the 1990s, automated quality management systems were introduced into the contact center market, significantly boosting evaluator productivity and focusing on the importance of individual agent performance. Since that time, there have been technical improvements in these systems—digital recording, online evaluation forms, Web-based access—but nothing really changed in how the quality process was targeted.

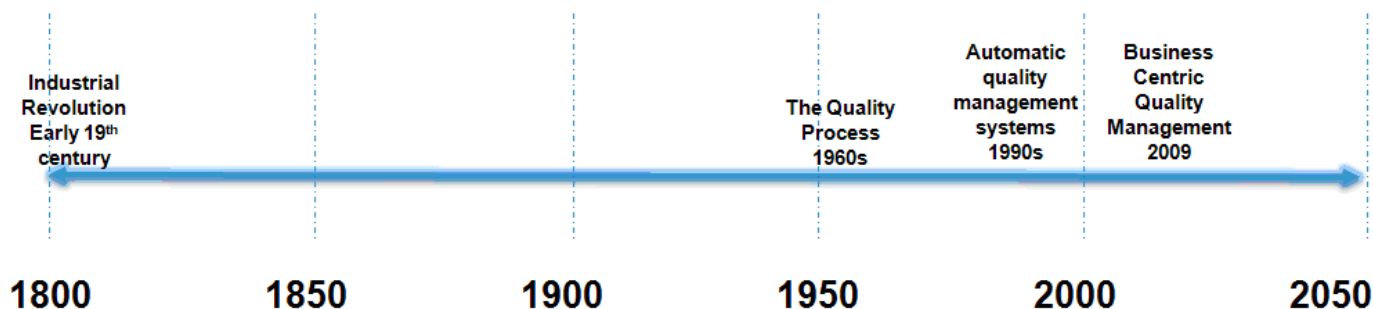


Figure 1: Evolution of Quality Management

Agent-Centric Quality Management

Contact centers have long understood the significance an agent's behavior has on their customers' perception of the business, and ultimately their loyalty. As a result, quality management systems have focused on monitoring and managing individual agent performance. They are agent-centric in their approach of creating improvement.

There is merit to this approach. Weeding out bad agents, or if possible helping them overcome bad habits, should improve overall service quality along with customer satisfaction. Conversely, effective agents can be identified and rewarded for their superior performance so they will stay happy and not look for jobs at a competitive contact center. Examples of their correct behavior can even be used to help train those that are struggling to succeed.

Limitations of Agent-Centric Quality Management

Ultimately though, this agent-centric focus has led to some serious limitations. In an effort to be fair when selecting which calls are evaluated for an individual agent, calls are randomly selected. This is a good approach to address the fairness issue. Random call selection, by definition though, eliminates the potential to utilize quality management to target specific customer satisfaction issues, for example, excessive hold times and transfers, repeat calls and agent knowledge gaps.

A call exhibiting one of these issues may surface at random, but the focus is primarily on how a single agent performed. This one instance can be corrected and some warning flags may be raised, but there is no way to grasp the full extent of the issue across the business. There is also no way to know whether a particular issue is trending upward, downward or remaining the same.

Quality evaluation scores can be tracked, but there is no direct linkage between these scores and overall business performance. Contact centers attempt to overcome this lack of linkage through the use of external process and procedure documents that specify what desired agent behaviors are expected. These documents must be updated regularly to keep current with business priorities. As written documents, they are also subject to varying interpretations from evaluation personnel.

In short, all an agent-centric quality management process measures and manages is individual agent conformance with established processes and procedures. It provides very little insight into how well quality management contributes to the strategic goals of the business.

Business-Centric Quality Management

A new concept of quality management is emerging that aims to overcome these limitations by focusing the quality management process on optimizing business performance. This business-centric approach is achieved by linking the strategic objectives of the business and the quality process together within the quality management system itself.

Instead of only selecting calls at random for evaluation, they are presented based on their impact on key performance indicators (KPIs) relevant to overall business performance, such as excessive handle times, escalations or unresolved customer issues. Using this approach managers are directed straight to the agents having the most impact on KPI achievement. This enables them to identify and resolve individual performance issues with the highest potential benefit.

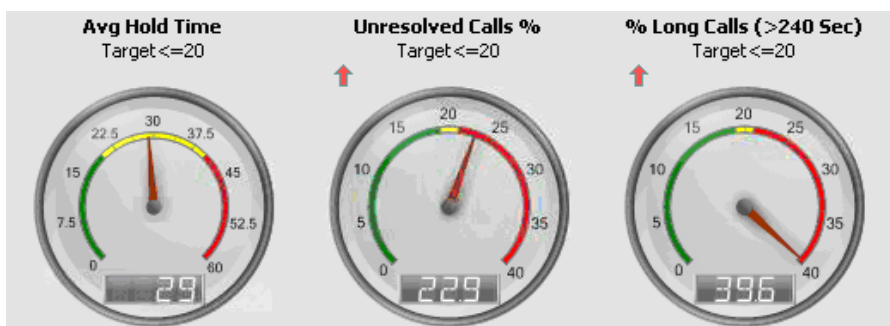


Figure 2: KPI Gauges

This is best illustrated through the use of an example.

A supervisor, Andrew, is presented with a dashboard for monitoring KPIs of his agent team. One of the KPIs, average hold time, is exceeding the desired threshold. Clicking on the gauge for the KPI, Andrew is presented with a list of his agents and their individual performances for this KPI. One of Andrew's agents, Jane, is significantly exceeding the average hold time goal. Her performance trend is also declining.

Clicking on Jane's name, Andrew is presented with a list of Jane's calls where she did not meet the target for average hold time. He could also choose to view her calls where she met or exceeded the target, or both, depending on what he is investigating. Listening to a few of the problematic calls it becomes apparent that Jane is struggling with knowledge gaps regarding the new billing statement. Rather than leaving his desk and interrupting Jane to explain the problem, he uses an integrated, online coaching system to send her a quick reminder of the changes. He also attaches a reference document from the training session for her to review.

This example could have also started from a higher-level KPI view, drilling down first to team performance and then to individual agent performance.

Expanding the Possibilities with Interaction Analytics

Business-centric quality management systems can be further enhanced by utilizing innovative analytics technologies that bring the “voice of the customer” into the process. This expands the range and scope of potential business issues that can be targeted. Interaction analytics technology categorizes calls based on their spoken content, the actions of the agent and customer as well as information from emails, chat and other sources.

Analytics categories reflect important business topics such as propensity for customer churn, repeat and long calls, successful and unsuccessful up-sell opportunities and customer dissatisfaction. Interactions are automatically analyzed as they are captured and placed into one or more categories based on what transpired during the interaction. This grouping of interactions by targeted business issues provides long-term tracking to identify trends and makes them readily available for further analysis.

Extending a business-centric quality management system with interaction analytics significantly expands the types of KPIs that can be monitored, and their corresponding business performance objectives that can be targeted.

Interaction analytics also provides an array of automated root-cause analysis tools to greatly improve the investigation and determination of the underlying causes of KPIs breaches. This speeds up the improvement process, further increasing efficiency. It also provides highly accurate and detailed insights into the real contributors of performance issues. Insights which are then used to create finely targeted corrective actions, resulting in highly effective results.

From Knowledge to Action – Driving Performance Gains

Business-centric quality management takes the time-tested quality cycle—monitoring, problem identification, root cause analysis, corrective action and continued monitoring—and embeds that process in an automated solution. In doing so, it creates a closed-loop system for driving continued business improvement.



Figure 3: Performance Improvement Process

This new approach to quality management promises to be the next big evolutionary step by overcoming the limitations of traditional agent-centric systems. Aligning individual agent performance with strategic organizational goals, within an automated closed-loop process, enables organizations to more effectively drive incremental performance improvements in key business objectives.

The focus on business performance extends the benefits of quality management beyond ensuring agent conformance to processes and procedures. It offers the potential to transform quality management into a powerful solution for optimizing business performance.



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