Case Study:
Linking Quality Results to Actual Business Outcomes

Financial Services Provider

After implementing the COPC Inc. quality approach, quality results were finally aligned with customer satisfaction results

Challenge

This leading financial services organization was struggling with a typical challenge – the results reported from the quality program were consistently in the high 80s or 90s, but they were experiencing low performance in customer satisfaction. With results this good reported from quality, operations did not believe much action was needed to improve. COPC Inc. was asked to work with the organization to better align quality with actual business results so the quality data could be used as a predictor of performance.

The COPC Inc. Solution

COPC Inc. worked with the client team to redesign and execute a new quality program. After assessing the current program, the following changes were made:

- Modified the quality form to ensure key customer, business, and compliance drivers were treated and scored as critical attributes.
- Evaluated transactions from the CUSTOMER'S perspective instead of simply the agent's perspective. For example, if the issue was not resolved for ANY reason, it was considered not resolved, even if it was a non-agent issue.
- Implemented appropriate metrics to ensure an accurate reflection of performance from the customer, business, and compliance perspectives.

Results

COPC Inc. then monitored a statistically valid sample of transactions using the new form and approach. The team then compared those results to the original quality results, found below in Figure 1.

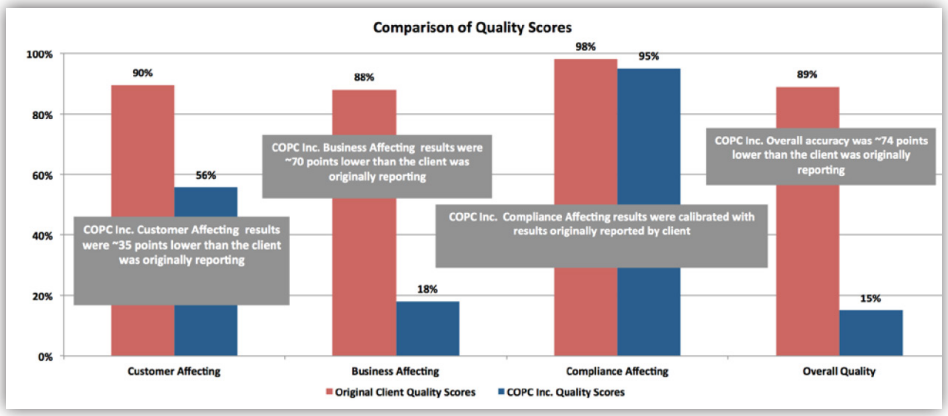

Figure 1: Figure 1 shows that the client was actually reporting several quality metrics (Customer, Business, and Compliance skills), which is the correct approach. However, the scores for each category were overstated in the high 80s and 90s.

- **Customer Affecting** attributes were reported as 90% originally, while COPC Inc. reported a 56% Customer Affecting accuracy (~35 points lower than the client was reporting)
- **Business Affecting** attributes were reported as 88% originally, compared to COPC Inc's results of 18% (~70 points lower than the client was reporting)
- **Compliance Affecting** attributes were reported as 98% originally, and COPC Inc. had a similar result of 95%. So the client's original score was calibrated to the redesigned COPC Inc. approach
- The **Overall** quality result originally reported was 89%. COPC Inc. reported a 15% overall accuracy (~74 points lower than the client was reporting)

The next step was to compare both sets of quality results to actual customer satisfaction results and other business measures.

	Actual Results	Original Client Results	COPC Inc. Results
FCR	71% (Customer Survey Results)	96% (Fulfilled Customer Request score from QA form)	68% (Resolved issue score from COPC Inc. form)
Top Box	63% (Customer Survey Results)	89% (Overall Quality Score)	56% (Customer Affecting Accuracy result from COPC Inc.)
Business Attributes	15% (Results by client Audit)	96% (QA results – Business Attributes Section Score)	18% (Business Affecting Accuracy result from COPC Inc.)

Figure 2: As shown in Figure 2, it is evident that the results from the COPC Inc. approach were more closely aligned with customer satisfaction results and other business measures.

- When compared to actual Customer Satisfaction (CSAT) results (63% Top Box), the COPC Inc. customer affecting quality scores (56%) proved to be more aligned and therefore a more accurate picture of the customer experience.
- First Call Resolution (FCR), as measured through customer satisfaction surveys, was 71%. COPC Inc.'s result of the same through the redesigned quality approach was 68%. The originally reported result from the company's quality process was 96%. Should the original quality results be used, the company would be under the false assumption that no action was needed to improve issue resolution.
- Not only did the COPC Inc. redesigned quality process correlate customer quality metrics and CSAT, the correlation extends to business attributes. The COPC Inc. scores for business attributes looked so dramatically lower than the existing quality scores (18% vs. 96%, respectively) that they became questionable. However, upon an internal company-performed audit, the redesigned quality process scores proved out here as well.

In summary, by redesigning their quality approach, the client could now be confident that the results reported from quality aligned with actual customer and business outcomes. Quality data could now be used as a predictor of performance, driving improvements in the customer experience and overall performance.

About COPC Inc.

COPC Inc. provides consulting, training, certification, benchmarking and research for operations supporting the customer experience. The company created the COPC Standards, a collection of performance management systems for customer experience operations, customer experience management, vendor management and procurement.

Founded in 1996, COPC Inc. began by helping call centers improve their performance. Today, the company is an innovative global leader that empowers organizations to optimize operations to deliver a superior service journey. COPC Inc. headquarters are in Winter Park, FL, U.S., with operations in Europe, the Middle East, Africa, Asia Pacific, Latin America, India and Japan. www.copc.com.

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