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All of us who work in the customer contact industry have experienced this—we have quality scores in the 90s, but our customer satisfaction (CSAT) or issue resolution results are in the 60s or 70s. How can that be? Why is it that our quality results are not aligned with CSAT and other business measures?

It begs the questions. Do you really know what your customer is experiencing with your contact center? How can there be such a disconnect between the results of your quality monitoring program and what your customers are telling you about their actual experience?

> Eighty percent of company executives surveyed believe their company was providing a 'superior experience' to their customers. Actual customers surveyed about their perceptions, rated only eight percent of those same companies as 'superior' in customer experience.
>
> — 2011 Aberdeen Research Survey

Overview

Most quality programs are not designed correctly to drive improvements that will directly impact the customer experience or provide an accurate measure of performance. This fundamental problem prevents your contact center from getting the desired return on investment (ROI) from your quality program in terms of performance. Plus, your quality program does not deliver value back to the organization.

COPC Inc. provides performance improvement consulting services for customer contact operations throughout the world, and we have found that when quality programs are designed correctly, it can predict the customer's experience with your company. This will allow you to be more proactive in fixing issues before they impact your customers.

This white paper offers **seven fundamental changes** we have recommended to our clients to drive improvements in their quality programs. By doing so, they have transformed these programs to directly and substantially improve their customers' experience with their contact center operation. These changes are:

- Redesign the quality form to align with key customer drivers
- Score only output metrics and use sub-attributes to capture reasons for errors
- Measure quality using three metrics instead of one overall score
- Evaluate transactions from the customer's perspective
- Capture non-agent issues for lack of issue resolution
- Expand the quality process to include the capture of business intelligence
- Focus on systemic issues through your quality process

By implementing these changes, your quality program will become a stronger asset to your company. Not only will you be able to drive improvements that directly improve the customer experience, but you also will be able to provide valuable customer insights to help your overall business performance.

1. **Redesign Your Quality Forms to Focus on Key Customer Drivers**

   Many differing opinions can go into developing quality forms, which result in including attributes that just are not important to the customer's experience with your contact center. Instead of relying on opinions, you should conduct analysis of your customer satisfaction data to truly understand the key drivers of your customers' experience. Once you identify those key drivers—and there are usually less than seven—they should be included on your quality form as customer-critical attributes. You will have other critical attributes from a business and compliance perspective, but for this discussion we are targeting only those attributes related to the customer.

   If you focus only on key customer-critical drivers, this implies you should minimize the use of noncritical items, such as using the appropriate greeting and closing, or saying the customer's name a specific number of times. Only those items most important to the customer should be included on your quality form to ensure quality results are correlated to the customer's actual experience.

2. **Only Score Output Metrics and Use Sub-Attributes to Capture Reasons for Errors**

   Only output metrics, such as issue resolution or providing accurate information, should be scored in your quality forms. Again, you want to focus on the customer's experience, and the output is what the customer truly cares about. Then, use sub-attributes to capture the reason for a failure. For example, if the issue was not resolved, you would score that as a "fail," and then choose the appropriate reason, or causal factor, for the error.

   If the reason an agent did not resolve the issue was because they did not use their tools, you would choose "did not use tools" as the sub-attribute. This allows you to accurately measure performance, while collecting detailed information about the causal factors of errors. From that data, you can quickly uncover areas that need to be addressed and take action that will result in direct improvements.

3. Measure Quality With Three Metrics Instead of One Overall Quality Score

Using just one overall quality score cannot provide an accurate measure of your operation's performance. Customer, business and compliance attributes should be treated and scored separately. If you use an overall score, all attributes are rolled up and averaged to achieve that one score, regardless of whether they impact the customer or the business. By using an average, you are creating both inflated and inaccurate results. See the example in the chart in Figure 1.

Overall Scoring vs Three Metrics

Calculated the typical way with a combined score, this company reported an overall quality result of **86%**. When calculated the recommended way using three separate metrics, actual performance was much lower in two areas, with Customer Critical Accuracy at **60%** and Business Critical Accuracy at **70%**.

Overall Score: 86%
Customer Critical Accuracy: 60%
Business Critical Accuracy: 70%
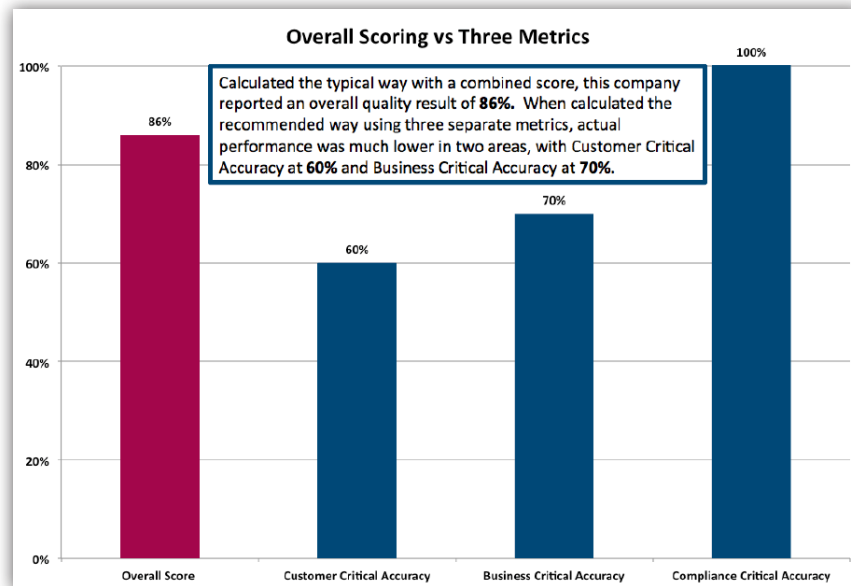Compliance Critical Accuracy: 100%

Figure 1

In Figure 1, the overall quality score was reported at 86 percent. However, when the three metrics that encompass that score are separated, it tells a different story about the actual performance. For Customer Critical Accuracy, 60 percent of transactions had no customer-critical errors. For Business Critical Accuracy, 70 percent of transactions had no business-critical errors. For Compliance Critical Accuracy, all transactions were compliant at 100 percent. By combining these scores to an average of 86 percent, you both deny the high performance in compliance, while at the same time do not understand the reality of what your customers are experiencing, as reflected in the customer-critical accuracy score. This quality result of 60 percent, rather than 86 percent, is a more accurate reflection of the customer's experience, and therefore better correlates with your actual CSAT results.

4. Evaluate Transactions From the Customer's Perspective, Instead of the Agent's Perspective

We have found over our 16 years of working with our contact center clients that this is one of the biggest mistakes of most quality programs. Assessing only the agent's behavior rather than the customer's experience is one of the main reasons for the disconnect between quality scores and CSAT scores. When scoring transactions, you should listen to calls and evaluate the interaction from the customer's perspective.

Best example – Issue Resolution

Approach	Was issue resolved?	Did agent perform prescribed steps?	The Call…	CSAT result…
Customer Perspective (recommended approach)	No	Yes	**Fails**	**True reflection**
Agent Perspective	No	Yes	**Passes**	**Untrue reflection**

Figure 2

The best example of this can be found with issue resolution, as represented in Figure 2. In most cases, if the agent did everything correctly but the issue was not resolved, evaluators will score the call as a "pass." However, the correct approach in this situation would be to score the call as a "fail," because from the customer's perspective, their needs were not met. If you view the transaction from the customer's perspective, then your quality results should align with the reality of your customer's experience. **Note: The agent is not failed in this example. The call is considered a failure at the overall business level.**

5. **Ensure You Capture Non-Agent Reasons for Non-Resolution**

Many things about a company's activities can impact a customer's experience. It is not just about the agent interaction in a contact center. These other non-agent related items such as technical issues, company policies, or operational processes, typically are not captured through the quality process. If you do not capture this information, you lack visibility into all potential business issues that affect the customer's experience. When you do capture this information, you will better quantify the improvement opportunity within the call center AND in other parts of the business.

Figure 3 shows an example of both agent-related data and non-agent data captured through the quality process. In this situation, when the customer's issue was not resolved, the majority of the time this was due to non-agent issues. By tracking this information, you get a true picture of what your customers are actually experiencing. In this case, only 57 percent of their issues were resolved. Secondly, this data gives you detailed information about the areas that actually impacted the customer, whether those areas were agent-related or not. In this example, 78 percent of the time the reason for lack of issue resolution had nothing to do with the agent at all. Instead, the biggest reason was a stated company policy, something that neither the agent nor the contact center had control over or the ability to change.
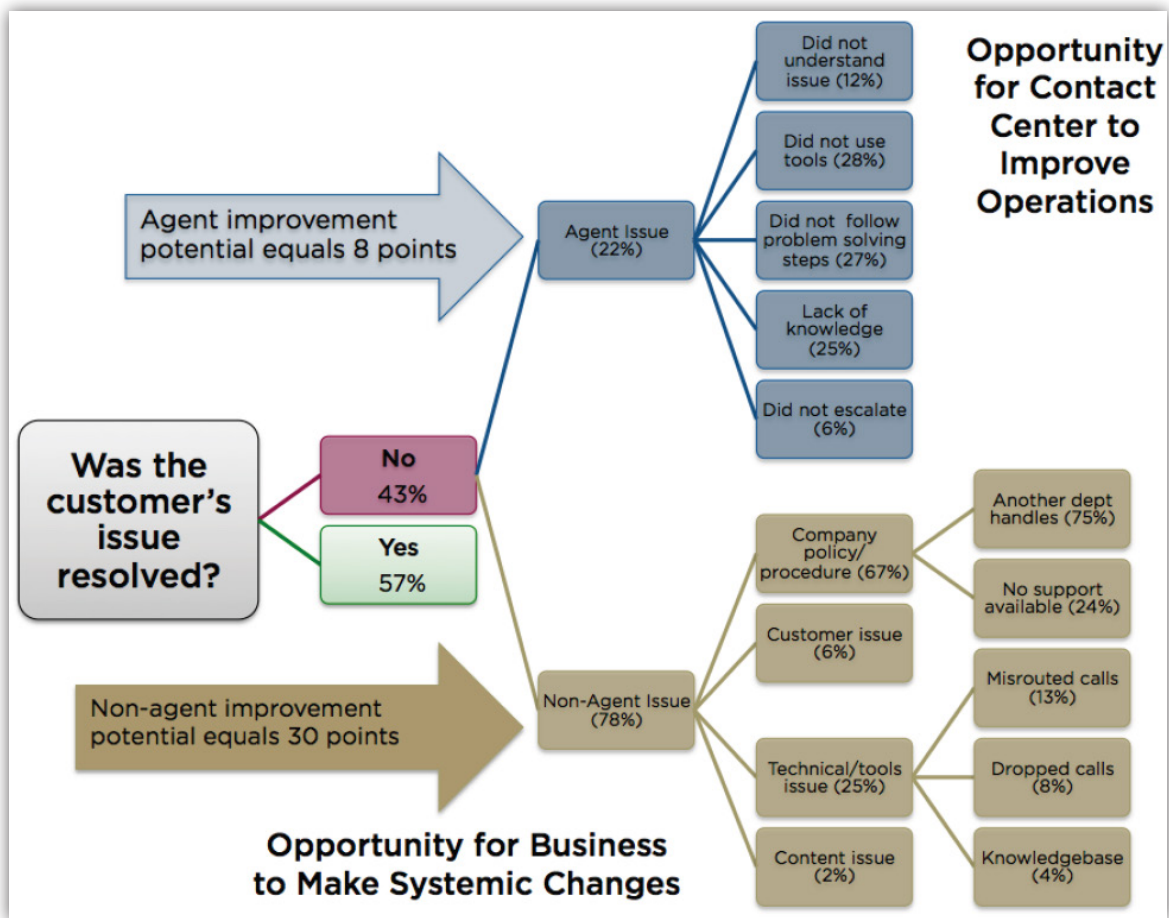
Figure 3

By collecting both agent-related and non-agent related issues, operations can more accurately quantify their improvement opportunity, and focus only on those agent-related issues within their control. In addition, this data gives your executive team information about non-agent issues that are impacting the customer's experience. Armed with this information, management can make informed business decisions about areas that are affecting their business performance. At the same time, operations can now be held accountable for only what is within their control.

6. **Expand The Quality Process to Capture Valuable Business Intelligence**

Your customer contact center is one of the best windows into the customer experience. However, most quality programs are not set up to capture what customers are actually telling you, because most programs are primarily focused on agent behavior. Instead, your quality process can also capture valuable insights that the customer is giving you.

With this information, your company can make strategic decisions to better serve your customers in areas such as marketing, product development, sales, operations, company policies and processes. This data could include:

- Why the customer liked or disliked a particular product or service
- Customer requests for additional products or services
- The impact of a policy or process change on the customer's experience
- Reaction to a new marketing campaign or sales promotion
- Information about the effectiveness of the sales process

By gathering this information through the quality process, your customer contact operation can become a strategic part of building brand value for your company. You will provide valuable information back to the company and make your contact center and your quality process an even greater asset to the organization.

7. **Quality Processes Should Focus on Systemic Issues**

Historically, the contact center industry has approached quality much differently than other industries. Typically our industry has focused too much on the behavior of individual agents, rather than identifying process or systemic issues that could be causing performance issues. If an agent makes an error, they are typically blamed. For example, if 12 agents are all missing the same attribute, the most common solution has been to coach each one of them. Conversely, if the agent follows correct procedures, then the call is "passed," regardless of the customer being satisfied with the outcome. However, through our client work, we have found that nearly 75 percent of the issues impacting contact center performance are systemic in nature. These issues include areas such as:

- A process or policy is confusing or limiting
- Capable agents were not sufficiently recruited
- Agents were not trained adequately
- Updates and changes were not communicated sufficiently
- Issues with using systems and tools

If multiple agents are experiencing the same issue, it is likely that the problem is something systemic. If you fix the systemic issue, such as by providing appropriate training, then you will usually solve the issue for all agents.

Implementing Change

To implement the changes recommended in this white paper, your quality program should be designed to include two separate but equally important approaches, from a business perspective AND an agent perspective. The primary objective of a business-level quality approach is to provide an accurate view of the center's performance from the larger organizational perspective, identify systemic issues, uncover problems that are impacting overall performance (both agent and nonagent), and provide valuable business intelligence to the company. The primary objective of an agent-level approach is to monitor and improve the performance of individual agents.

Both of these approaches are equally important and necessary when implementing your quality program. Supervisors and front-line managers are best suited to conduct agent-level monitoring and coaching. An independent quality team is most effective in conducting business-level monitoring by evaluating a random sample of transactions to achieve a statistically valid sample on a monthly basis.

Sample Results

We have provided two examples of companies that implemented these recommended quality changes, along with the positive results they achieved in improving CSAT and reducing customer dissatisfaction (DSAT).
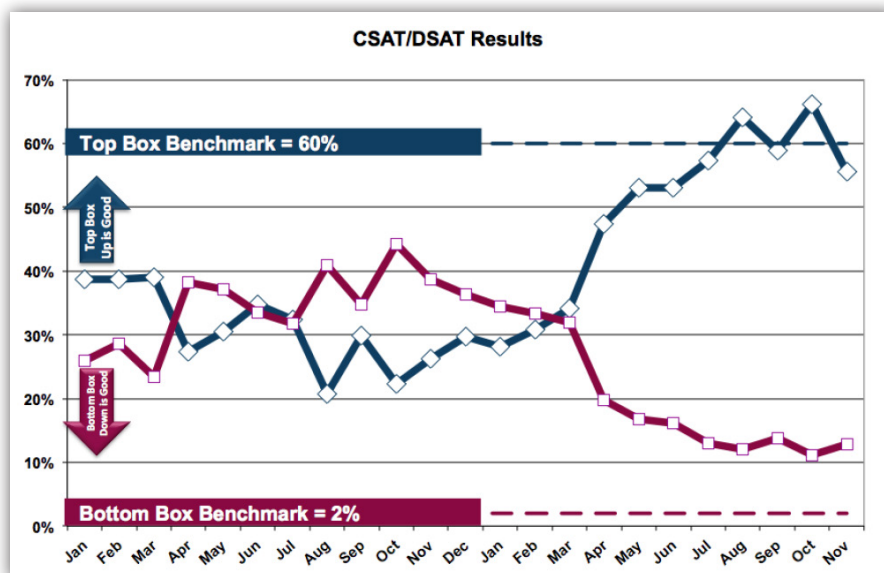

Figure 4

Figure 4 shows a company that achieved a 30-point increase in customer satisfaction while cutting dissatisfaction in half after changing its quality approach. The company aligned its quality forms with key drivers and determined that the primary issue impacting customer satisfaction was not providing accurate information. Through the quality process, it uncovered the systemic issues causing this problem, and implemented actions to solve it. These actions involved several components such as knowledge base changes and center-wide retraining. Once the company knew what its actual performance was and how these systemic issues were impacting performance, it was able to quickly turn around its performance.
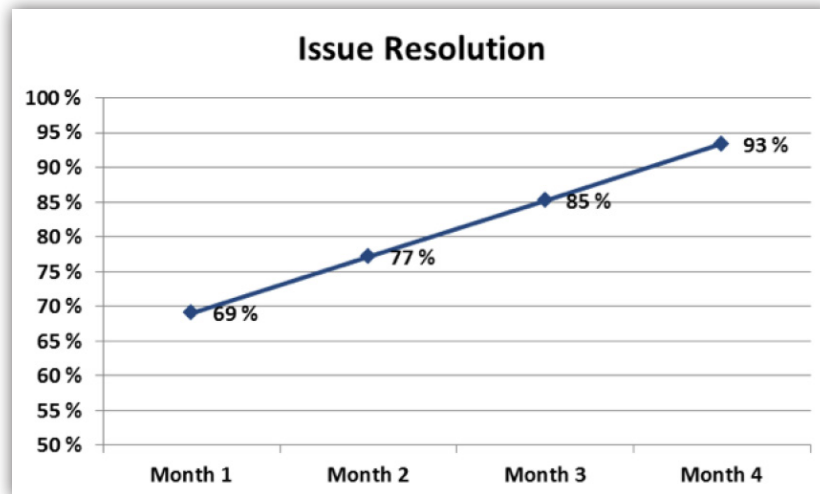
Figure 5

In Figure 5, this company achieved a more than 20-point improvement in issue resolution in just four months. The organization completely redesigned its quality process to align with key drivers, capturing all reasons for non-resolution, including both agent and non-agent. Through this process, it uncovered two primary issues impacting performance. One was a simple IVR issue that no one had uncovered before. The other was the need for a center-wide retraining about the leading issues that were driving customers to complain. Prior to implementing this process, the company's improvement efforts were primarily agent-level coaching, which were not producing desired results. Making these changes in its quality process paid off quickly in its issue-resolution results.

The level of improvement shown in Figures 4 and 5 is not uncommon. If you change the design of your quality program to evaluate your contact center operation from the customer's perspective, you will link your quality results to CSAT and other business outcomes. You will find your underlying performance issues, and you will no longer have that disconnect in results. You can be assured that changes you make will have a direct impact on your operation, and your quality program will become a true asset to your business.

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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