

Improving Business Performance through Outcome-Focused Quality Monitoring

The Value of an Analytics-Driven Approach

Research Perspective

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Aligning Business and IT To Improve Performance

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Quality Monitoring Today

Benchmark research by Ventana Research into contact center agent performance management shows that companies record anywhere from 2 or 3 percent to 100 percent of calls. These recordings contain potentially valuable insights into what agents and callers say during calls, but the research shows that companies use them mostly to assess agent performance, which they do by listening to approximately 5 percent of the recorded calls. This is a manual process that involves someone listening to recordings and completing a standard form to assess how well the agent performed. Reviewing even this small a sample is time-consuming, subjective and limited in scope, and it is unlikely to represent overall performance because it cannot reflect all the types of calls handled by the agent. Further, the process typically ignores the caller's side of the call and thus reveals little that can help the business improve the outcomes of customer interactions.

Wider analysis of quality monitoring often is limited because most companies use spreadsheets as the main tool for analysis. More mature companies have implemented dedicated analytics tools, but most limit their use to analyzing structured transactional data such as call and CRM records.

The most mature companies, in contrast, adopt advanced analytics tools that work with unstructured data such as call recordings, text (such as letters, forms, surveys, instant messages and CRM notes) and event data collected as agents use their desktop systems. This analysis enables the companies to extend the scope of the quality monitoring process to include customer and other information and to focus on the business outcome.

Advanced analytics tools work with unstructured data such as call recordings, text and event data collected as agents use their desktop systems.

Analytics-Driven Quality Monitoring

The emergence of new technologies is enabling companies to change their quality-monitoring processes to better support overall business objectives. The latest call-recording systems and hardware make it affordable and practical to record 100 percent of calls, and new data-capture techniques make it possible to record all other forms of customer interactions such as letters, survey forms, email messages and Web-based chat sessions. Using advanced integration techniques, companies can capture all customer-related interactions and tag these with other transactional data such as name, address and phone number. The starting point for many companies is to capture customer survey response data from completed Web-based or text surveys and link each survey back to the agent who handled the original interaction, while at the same time using data and text analytics to prepopulate some of the fields in the agent's quality assurance (QA) form – such as a QA score of 1 to 5 derived from selected customer answers, for

example, how likely the person is to recommend the company based on how the agent handled the call.

The latest tools also allow companies to identify both the systems and the data agents used to resolve customer interactions and link these with the recording of the original call. Speech and desktop analytics then allow them to combine information derived from both sources to classify calls and identify those that require special attention – for example, customers complaining about a specific product, service or agent. The final step is to use all forms of analytics (structured, speech, text and desktop) on all forms of data, combine the outputs and identify the outcomes, yielding an understanding of all the interaction-handling processes from beginning to end, including those that cross communications channel boundaries, and the actions of everyone involved in trying to resolve the issue. An example of a challenge these analytics can address is a customer who began trying to purchase an item on the Web, then called the contact center and chose to drop out of IVR to speak to an agent who closed the sale, after which the customer completed a mailed survey in which he indicated that he was unhappy having to use two channels but was very happy with the way the agent handled the call. Analytics applied to the full interaction can yield information that can be used to prepopulate agent QA forms.

Analytics applied to a full customer interaction can yield information that can be used to prepopulate agent quality assurance forms.

Our benchmark research shows that contact center managers and their bosses focus on key performance measures as a way to assess agent performance. These measures range from efficiency metrics such as average call-handling time and time spent on after-call work to effectiveness metrics such as customer satisfaction scores, first-contact-resolution rates, net promoter scores and

customer effort scores. By using various analytics and combining them with predefined rules, companies can automate the process of calculating these scores and prepopulating the agent QA form.

This use of analytics allows companies to spot trends, hot issues and best practices for handling different interaction types and to generate better business outcomes as a result. This analysis can be used to personalize agent coaching and training needs, prepopulate QA forms and improve interaction-handling processes. Mature companies combine dashboards, graphical analysis, workflow and alerts to ensure issues arising from the analysis are dealt with, such as ensuring that agents take the identified training. The most mature Innovative companies build these steps into a continuous improvement process that uses analysis to understand what is happening, what the outcomes are and what areas need improving, to manage the improvement process and then to measure again to ensure the changes are effective.

Benefits of This Approach

This analytics-driven approach can provide a number of benefits:

- Being more automated, it is timelier and less costly to use.
- It enables companies to prioritize the review of interactions by categorizing interaction recordings by business issues and outcomes and then allowing the system to select the most appropriate evaluation form for the type of interaction.
- It has a more unified structure, taking into account both agent performance and the impact on the customer and business results.
- Being based on common analysis and business rules, it is more objective, so all participants can trust the outputs.
- Agent evaluation forms can be at least partially completed and can be used to develop more personalized and focused agent training and coaching, and send alerts to managers or supervisors based on quality scores.

The old-style manual quality monitoring process is not responsive or detailed enough, and it focuses narrowly on agent performance rather than business outcomes. Today's analytics-driven quality tools allow companies to automate the end-to-end quality monitoring process, gain more detailed insight into agent performance, identify best practices and predict business outcomes. By doing so they can improve interaction-handling processes, more accurately and consistently derive key performance metrics and focus agent coaching and training where they are needed most. Likely results will be more agents following best practices, less agent turnover, more highly skilled agents delivering more consistent and satisfying customer experiences, and better business outcomes.

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