Transform your Contact Center with Analytics-Enabled Quality Management

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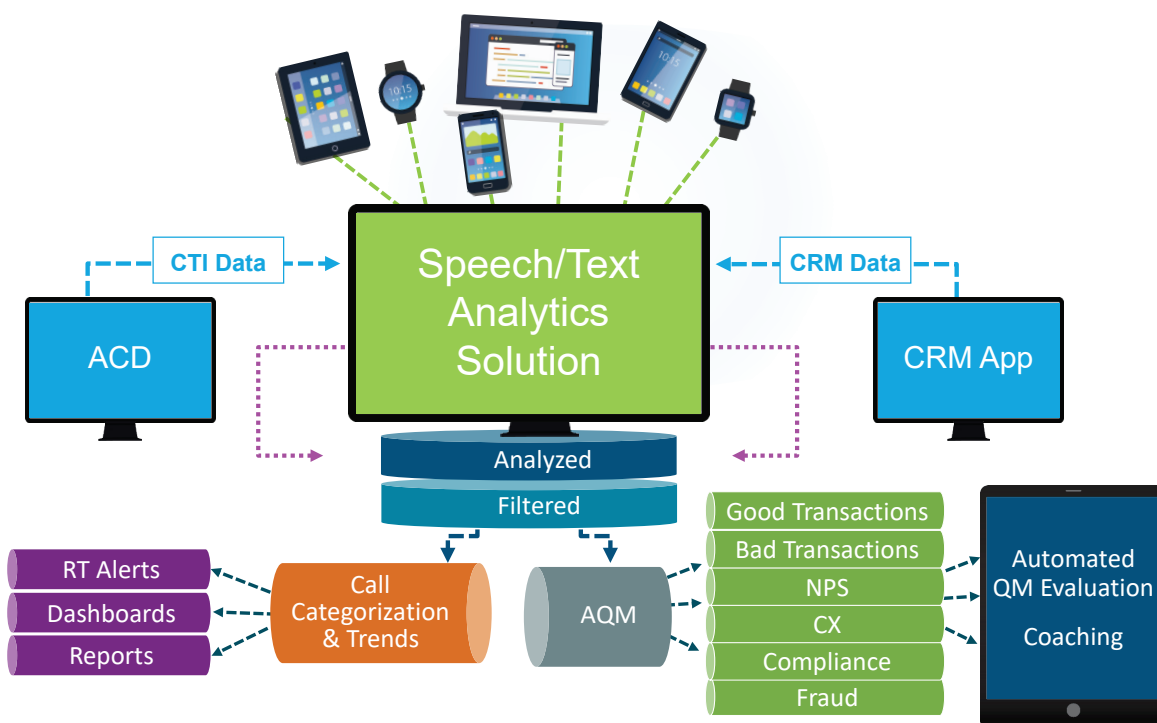
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I.   Introduction

Quality management (QM) is an essential application and process in contact centers. Its fundamental purpose is to ensure that agents adhere to internal policies and procedures, but it does so much more for companies and their customers. From the customer perspective, QM should be used to make sure agents are effective at building rapport and are caring and empathetic throughout conversations (calls and digital); are knowledgeable about products and services and can answer a majority of inquiries; know where to find additional information; and have excellent call/interaction management skills. From the enterprise perspective, QM should be applied to build the brand, deliver a consistently outstanding customer experience cost effectively (i.e., quickly), identify company and contact center issues and trends, and make sure that agents are taking the right actions for customers, properly processing transactions and not engaging in fraudulent activities. When it comes to the contact center, QM should also be used to identify agent training opportunities and individuals who are having a hard time performing their job, so that supervisors know when to provide assistance. Companies are asking a lot from their QM function, often at the same time as they reduce the budget for this activity and ask its leaders to come up with creative methods for reviewing more interactions (the "classic" contact center goal of "doing more with less"). An effective way to address this challenge is to automate the QM process with an analytics-enabled QM (AQM) solution.

II.   What is Analytics-Enabled Quality Management?

Analytics-enabled QM is an application designed to automate the QM process. DMG Consulting defines AQM as "an application that leverages interaction analytics (IA), business rules and automation to identify, classify and score as much as 100% of voice and text-based interactions based on defined quality criteria." See Figure 1.

Figure 1: The AQM Process

Source: DMG Consulting LLC, February 2021

Analytics-enabled QM solutions capture and evaluate interactions in order to measure agent performance and assess their impact on the brand, customer experience and customer effort. To achieve these objectives, an AQM solution must perform three core evaluations on every interaction:

1. Did the agent respond properly to the customer inquiry?

2. Did the agent deliver the right answer/information in an appropriate manner for each customer?

3. Did the agent handle the interaction with appropriate emotion and empathy?

Once the AQM solution performs these assessments, it can "score" how well the agent performs in each of these categories. Since an AQM system uses artificial intelligence (AI)-enabled technology to conduct these evaluations, this automated process is more accurate than when done manually (and randomly), using traditional QM. Additionally, AQM applications can evaluate 100% of customer interactions cost effectively, whether they are voice or digital, and can compare findings by interaction, agent, site, country, channel or topic. Analytics-enabled QM is the future of QM, as, unlike the manual QM approach, it can scale and expand to meet the needs of digitally transformed contact centers.

III.   How to Implement AQM Successfully

Analytics-enabled QM solutions use IA technology, including emotion detection and sentiment analysis, to evaluate customer interactions. While the AQM solutions in the market use different techniques and technologies, the process generally begins by converting unstructured recorded and live-stream audio and digital customer conversations into transcripts and/or structured output files that can be searched, analyzed and, if desired, categorized. Set forth below are the steps companies should follow to launch their AQM initiative.

Step 1: Getting Started. Setting up an AQM system and process involves some of the same activities required when establishing a manual QM initiative. The QM team, consisting of a QM leader (or specialist) and contact center managers, supervisors, agents and trainers, drafts one or more QM evaluation forms. (If the department has an existing QM monitoring form, it can be used as a starting point but should be revisited.) The team should begin by identifying the major components of a "conversation" (voice or digital) that are most important to customers and the company, and make these the sections in the evaluation form. The most common ones are:

1. Opening – the agent identifies themselves and the brand while quickly establishing rapport

2. Identification of customer issue/opportunity – the agent determines why the customer is contacting the brand

3. Verification – the agent confirms the customer is who they say they are, if necessary

4. Problem solving/providing information – the agent solves the problem and/or gives the customer the information/answer

5. Closing – the agent wraps up the conversation

6. Agent empathy – the agent demonstrates that they care about the customer and their issues

Once the sections are finalized, the team should build out the rest of the QM evaluation form. This includes drafting the questions for each section, selecting a rating scheme (Yes/No, 1 to 10 scoring, etc.) and assigning weights to prioritize the importance of the questions and sections. When the QM team has a draft of the evaluation form(s), they should manually test it on a few dozen interactions to make sure it captures all of the important components of interactions.

Step 2: Setting up the AQM application. The QM specialist or other contact center staff member(s) who is going to maintain the AQM solution on an ongoing basis should work together with the vendor to set up the initial QM evaluation form(s) in the system. (The best way to learn to administer and use the solution is to implement and work with it.) If training courses are offered, invest the time to learn to use the application, so that in-house resources can maintain it once the vendor is gone. (It's a best practice to have at least 2 individuals in each contact center trained to administer the application.)

As part of the set-up process, contact center executive leadership will need to decide how they want to use the findings from the new AQM solution. The ideal approach is to leverage the AQM solution to score 100% of interactions in all channels, but few contact centers are doing this today. Therefore, it's necessary to decide on the percentage of interactions that needs to be scored for each agent and the department overall, on a monthly basis. DMG recommends a minimum of 25% of agent-handled interactions from all channels, for starters.

The next step is for the QM specialist to work with the AQM vendor to build the searches needed to capture the information required to answer each of the questions within the QM evaluation form(s). It may require 2 or 3 different searches to collect the data necessary to properly address some items in the QM evaluation form. This process will take time and require a significant amount of trial and error; however, it is worth the effort, as the iterations will help the QM specialist become comfortable in using the new AQM application.

Step 3: Test the efficacy of the automated QM process. Once the QM evaluation form(s) are set up in the AQM application and the searches required to identify and collect the information needed to complete the evaluation form are designed, conduct a thorough test of the solution. DMG recommends dedicating 3 – 6 weeks to this initial testing phase and involving contact center managers, supervisors, agents and trainers in the process so that they are comfortable with the system and its findings. It is also necessary to test each of the QM evaluation forms in all channels where the solution will be used. (In many AQM applications, the automated QM evaluation forms are often referred to as a scorecard.) When testing the efficacy of the AQM application, it may be necessary to modify the underlying questions in the scorecard to ensure that they capture the right information. This is an iterative process and should continue for as long as necessary to get it right.

Step 4: Conduct a pilot. Identify a small group of agents, or one team, to pilot the AQM application. (It's a best practice to select a multi-generational group of agents.) Explain the new solution and its purpose to the supervisor and agents involved in the pilot, so they know what to expect and understand the type of feedback that will be conducive to enhancing the AQM application before it is rolled out to the department. The QM specialist should sit with each of the participants and discuss their recommendations, and then update the system based on the feedback and continue with the pilot until all issues are addressed.

Step 5: Enhance QM scorecards and search criteria. As the pilot proceeds, make changes to the QM scorecards, the search criteria, and all other aspects of the solution, as issues are identified. Take every opportunity to customize the solution to the needs of your department.

Step 6: Train contact center leadership in using the solution. While the pilot is taking place, all contact center managers, supervisors, team leaders, trainers, etc. should participate in a training session so they know how to use the new AQM solution. The objective is to ensure all contact center leaders are comfortable with the new application and are in agreement with the plan to transition from manual QM to the AQM process and system.

Step 7: *Train all agents to understand and use the new AQM solution.* Once the contact center leadership team is trained, they should participate in training their own teams. One objective of this approach is to create advocates for the new AQM approach. A second goal is to get as many people knowledgeable in the use and application of the solution as soon as possible. Encourage contact center leaders and agents to provide feedback about the new AQM system and make the changes as quickly as possible when issues are identified.

Step 8: Cut over to the new AQM process. When all of the issues are addressed and the staff is ready and trained, cut over to the AQM application.

Step 9: Conduct a quarterly review of the AQM solution and process. One of the major advantages of AQM over the manual QM approach is that the AQM solutions are being enhanced on an ongoing basis and new capabilities are being introduced to the market continuously. This is a particular advantage for companies that are using a cloud-based AQM solution. Contact centers should conduct a thorough review of their AQM process and system on a quarterly basis and make the enhancements that will enable them to improve customer and agent engagement while increasing quality and productivity.

IV. Using AQM to Improve Agent Coaching and Retention

Analytics-enabled QM solutions can improve many aspects of a contact center, including the agent coaching process, which is essential for agent engagement and retention. Agent attrition is one of the most costly and mitigatable challenges in a contact center. One of the top reasons why agents resign is because they do not receive adequate feedback and coaching. Agent complaints about limited coaching opportunities are often fair, as supervisors and QM specialists do not always have enough time to work with their agents and may be uncomfortable delivering negative feedback in a one-on-one session.

Providing consistent feedback, both positive and negative, to agents is a best practice and necessary to improve the customer experience and agent retention as well as to reduce hiring, onboarding and training expenses. Agent attrition rates vary by industry and company; most business process outsourcers (BPOs), for example, experience an annual attrition rate higher than 100%. And, prior to the pandemic, in an enterprise contact center with more than 250 agents, an attrition rate of less than 20% was considered excellent. (Data is not yet available for the "new normal.")

Analytics-enabled QM solutions that come with automated coaching workflows are ideal for addressing the coaching challenge. An AQM solution is designed to use a series of discrete searches to evaluate each aspect of agent performance. When a coaching moment or opportunity is identified in a search, the AQM solution can be set up to search for an appropriate training or coaching session and send it to the agent. But this should be just the first step in the agent AQM/coaching process. The AQM application should be set up to monitor how each agent performs on an ongoing basis and to function as a "buddy," reminding the agent of opportunities for continuous improvement, complimenting them when they perform well, and encouraging them every step of the way. Using AQM to improve coaching is a game-changer for contact centers, as, when done right, it will help to reduce agent attrition. See Figure 2.

Figure 2: AQM/Coaching Cycle

Source: DMG Consulting LLC, February 2021

V.   Final Thoughts

Contact centers should transition from their manual QM programs to AI-enabled AQM solutions, as a standard component of their digital transformation. Analytics-enabled QM solutions are delivering many proven contributions and benefits to contact centers, including: automating the QM scoring process, providing timely and useful feedback to agents, measuring empathy as part of the QM process, enabling the QM team to do much more creatively with fewer resources, expanding QM to cover all channels/interactions, improving agent coaching and engagement, reducing agent attrition, and much more. Analytics-enabled QM is the future for the essential quality management function.

About NICE

NICE (Nasdaq: NICE) is the worldwide leading provider of both cloud and on-premises enterprise software solutions that empower organizations to make smarter decisions based on advanced analytics of structured and unstructured data. NICE helps organizations of all sizes deliver better customer service, ensure compliance, combat fraud and safeguard citizens. Over 22,000 organizations in more than 150 countries, including over 80 of the Fortune 100 companies, are using NICE solutions.

NICE Quality Central provides a holistic approach to quality management, ensuring that processes and agent performance align with business initiatives in today's omnichannel contact centers. Leveraging AI behavior and sentiment models, analytics and quality automation, contact centers have an efficient and accurate way to identify agent coaching opportunities that will improve their performance and the customer experience. For more information, visit https://www.nice.com/quality-management/

About DMG Consulting LLC

DMG Consulting LLC advises enterprises, vendors and the financial community on all aspects of building, acquiring, operating, optimizing and investing in contact centers, to enhance their enabling technologies and the customer experience (CX). A leader in vendor-agnostic research and consulting, DMG is the only firm whose expertise spans operations and technology. DMG is the primary source for market activity and revenue data and analysis for contact center IT segments. It publishes annual in-depth reports on contact center and back-office industry sectors, including contact center as a service (CCaaS), digital customer service, intelligent virtual agents, interaction analytics, robotic process automation (RPA), workforce management (WFM), workforce optimization (WFO) and more. These reports provide the accurate market share, trend identification, growth predictions, functional capabilities and pricing information DMG's global clients rely on to make critical business decisions. Learn more at dmgconsult.com

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