



Leading Practices in Quality Management
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- As a seasoned industry expert, Wendy has a successful track record of implementing and reengineering successful, world-class call center and processes and teams for companies of all sizes.
- In her 22 years as a customer service professional, she has held various positions responsible for all aspects of contact center operations – from CSR to call center manager to WFM director.
- She has a clear passion for Customer Service and a talent for being able to identify opportunities quickly within an organization and provide the necessary design to make cost-effective, data driven change.



The International Customer Management Institute (ICMI), has been in business for 26 years and is a leading global provider of comprehensive resources for customer management professionals—from frontline agents to executives—who wish to improve contact center operations, empower contact center employees and enhance customer loyalty.

The purpose of this session is to:

1. Share leading practices every Quality Management (QM) Program should have.
2. Discuss the benefits of adopting these practices
3. Share information on additional resources for enhancing your QM Program.

Identify the strategic objective of the quality monitoring program.

- **ACTION:**

- Identify the company's reasons for performing quality management processes.

- **BENEFIT:**

- Creates a strategic vision for developing and administering the QM program.
- Ensures consistency
- Helps manage the Cost of Quality

Determine and analyze the Cost of Quality (CoQ).

- **ACTION:**

- Analyze spending on quality, including a thorough analysis of costs per call and other factors like complaints and rework

- **BENEFIT:**

- Allows you to correlate spending with Customer Satisfaction
- Assess where resources should be applied to gain the highest business value

Document policies and procedures:

- **ACTION:**
 - Document all existing transaction policies and procedures
 - Set up a process that keeps policies and procedures up-to-date.

- **BENEFIT:**
 - Ensures consistency among contact center staff and QA specialists/supervisors
 - Decreases errors
 - Improves training time

Develop QM criteria and guidelines

- **ACTION:**

- Specify the criteria to apply when evaluating transactions and performing evaluations
- Provide examples of the right and wrong way to perform tasks
- Can be incorporated as a component of policies and procedures

- **BENEFIT:**

- Provide clarity on scoring and expectations
- Aids in calibration
- Improves training time

Define program mechanics

- **ACTION:**

- Who, what, when, how many and how

- **BENEFIT:**

- Improves communication
- Sets expectations
- Guide for setting up parameters in a QM system (if available)

Establish a closed-loop training process

- **ACTION:**

- Establish a closed-loop training process that addresses new content, system issues, updates and agent performance issues.
- Train everyone on the QM program and how to handle customer interactions and

- **BENEFIT:**

- Improves communication and ensures training and QA staff work together
- Improves the effectiveness of the QM program

Provide frequent feedback to agents about their performance.

- **ACTION:**

- Ensure QA staff/supervisors can provide effective, consistent coaching sessions
- Feedback should include where agents are performing well and areas where they have opportunities to improve.

- **BENEFIT:**

- Enhances employee development
- Improves morale
- Improves customer satisfaction

Build consistency into the QA program through calibration.

■ ACTION:

- All reviewers must listen to the same call, score it, identify variance in scoring approaches, reconcile their differences, and set a standard measurement that all will use going forward.
- Calibrate monthly
- Include agents in the process

■ BENEFIT:

- Ensures consistency and equity
- Improves the effectiveness of the QM program
- Helps agents appreciate the challenges associated with consistently evaluating transactions.

Provide a process to facilitate two-way communication between agents and reviewers

- **ACTION:**

- A mechanism for responding to their quality evaluations so that they feel empowered and heard.
- Include a process for filing complaints

- **BENEFIT:**

- Improves employee morale and communication
- Yields a better and more effective QM program

Incorporate the customer's experience into the monitoring process.

■ ACTION:

- Survey your customers to see how satisfied they are with the quality of an organization's products, services, processes and agents.
- Track interactions to see if the customer was are put on hold, transferred, required conferences, or was a repeat caller.
- Correlate quality monitoring results to customer feedback

■ BENEFIT:

- Improves customer satisfaction
- Lowers operating costs/increases revenue

Share monitoring information with other business departments.

- **ACTION:**

- Share essential information with stakeholders through call recordings.
- Invite stakeholders and executives to conduct side by side monitoring sessions

- **BENEFIT:**

- Improves customer satisfaction
- Improves products, services and lowers risk

Develop a cycle of continuous improvement.

- **ACTION**

- Develop a culture and processes that support and encourage continuous improvement of quality monitoring processes, including the gathering of information about customer satisfaction.

- **BENEFITS**

- Lowers costs
- Increases customer satisfaction
- Empowers employees

Recognize and reward top performers.

- **ACTION**

- Include a rewards and recognition as part of the QA program

- **BENEFITS**

- Encourages good work
- Motivates employees

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