



Omni-Channel QA Best Practices for Contact Centers

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Introduction

To improve the customer experience, companies need an omni-channel contact center infrastructure system to receive, intelligently route and queue interactions; a customer relationship management (CRM) application to track customer information and activities; and a workforce optimization solution to provide management, analytics and optimization capabilities. While a large percentage of contact centers have a quality assurance (QA) program to evaluate agent performance and the experience they deliver when handling calls, surprisingly, this activity is not performed in other channels such as email, text/SMS, online chat or social media posts.

This is an accident waiting to happen. It's only a matter of time before the risk of inaction catches up with organizations, as it is at least as likely that agents will do something wrong in a digital channel as on the phone. Even worse, a mistake made in some of the digital channels, such as social media, is likely to have a much more significant impact on an enterprise because it is more visible and public than a phone call. But the accident is avoidable.

To improve the customer experience, engage agents and eliminate risk, enterprises should build omni-channel QA programs and implement them as soon as possible. This white paper provides best practices to help companies build an effective omni-channel QA program for their contact centers.

What is an Omni-Channel QA Program?

An omni-channel QA program allows companies to perform QA on every channel and provides an assessment of every agent's performance throughout each customer's journey. The program evaluates all aspects of an agent's complicated job – greetings, problem identification and resolution, sales or up-selling, communications skills, time management, and closing in every channel in which they work – giving companies great insights into the quality of agent performance and the customer experience.

Building an Omni-Channel QA Program

Figure 1 is a high-level project plan for building an omni-channel QA program. This Figure breaks down an initiative into phases for building a successful program. Even if companies already have a formal or informal QA program in place for calls, and possibly a couple of other channels, it's a good idea to walk

through each of these steps and use them to assess, reinvigorate, or expand an existing program.

Figure 1: Omni-Channel QA Program Roadmap

Activity	Description	Responsibility	Time Frame	Status
1.0	Identify QA champion for the omni-channel contact center	Contact center leader	Before kicking off the QA project	
2.0	Identify QA program manager	Contact center leader	Before kicking off the QA project	
2.1	Identify resources to perform QA reviews	QA program manager with input from the contact center leader	1 week	
3.0	Create a QA program development team, including managers, supervisors, team leaders, agents, trainers, and other relevant staff	QA program manager with input from the contact center leader	1 week	
4.0	Communicate to staff that a new QA program is under development	QA program manager	1 week	
4.1	Draft an internal communication to explain the plans and why the program is being developed; share the name of project team members, and invite staff participation			
4.2	Discuss the new QA program in team huddles, and solicit suggestions and recommendations			
5.0	Develop evaluation forms for each channel; determine sections, questions and weights	QA team	2 weeks	
6.0	Test the evaluation forms with real interactions	QA team	3 weeks	
7.0	Develop quality monitoring criteria and guidelines for each channel	QA team	2 weeks	
7.1	Test the criteria and guidelines to ensure they are consistent in all channels			
7.2	Conduct calibration sessions for each channel and across channels			
8.0	Build a QA coaching and feedback process	QA team with assistance from a professional training	4 weeks	

Activity	Description	Responsibility	Time Frame	Status
		development resource		
8.1	Train all coaches so they know how to provide feedback to agents			
9.0	Build a QA training program	QA leader with assistance from a professional training development resource	4 weeks	
9.1	Train all contact center staff so they fully understand the new omni-channel QA program and what is expected of them in each channel and for the overall customer experience			
10.0	Pilot the program for 2 months	QA team	8 weeks	
11.0	Adjust the program and repeat the pilot as needed	QA team	1 week – this should be occurring throughout the pilot	
12.0	Implement the QA program	QA leader with support from the contact center leader	Once the other steps are done	
13.0	Annually review the QA program		Ongoing	

Source: DMG Consulting LLC, January 2017

Details of these steps are explained below. However, this plan is a guide, and each company should customize the steps to meet their own needs.

Activity 1: It's highly beneficial to invite a senior-level manager from outside of the contact center to be the project champion. Consider asking the head of marketing, the customer committee or another highly influential resource within the company. This will greatly enhance the credibility of the findings from QA and improve the chances of applying them outside of the contact center.

Activity 2: Assigning the right manager to oversee the development and ongoing management of the omni-channel QA initiative is essential for the program's success. It's not going to be easy to transition from a single channel to an omni-channel program. Managing the effort requires someone who knows the business of the company, fully understands the needs of the contact center, has outstanding organizational skills, and is well respected within the department. If you've been doing QA for many years, it may be a good idea to consider introducing a new, high-energy resource to transform your QA initiative.

Activity 3: Picking the right resources for the team is key to success. These employees must know the business and believe in the benefits of QA. They do not have to go into the process knowing how to build a QA program, as the QA program manager can teach them the skills they need.

Activity 4: To get all employees on board, staff communications about the new omni-channel QA initiative must be clear and frequent. This program will be instrumental in helping agents, team leaders, supervisors and managers perform their jobs successfully, so it's important for them to know what is going on and invite their participation and ideas on an ongoing basis.

Activity 5: Look at the journey through your customers' eyes, and evaluate agent performance from their perspective while also capturing essential information about whether agents are adhering to their policies and procedures. Take this opportunity to reimagine and possibly recreate QA evaluation forms as you go through the process of building additional ones for the new channels.

Activity 6: After drafting new evaluation forms and assigning weights to the various sections, test them out with real interactions. Expect to go through many tests and calibration sessions before finalizing this process. The more staff you involve in the process, the more effective the evaluation forms will be, while also achieving greater buy-in within the department.

Activity 7: For the program to succeed, the quality monitoring criteria and guidelines for each channel must be consistent, clear, and easy for everyone to understand and apply. QA concepts and approaches should be taught during the new-hire training program; you want your staff to be able to access their interactions and self-evaluate. They need to understand how each category and question is assessed in order for them to perceive the process as fair and just.

Activity 8: The toughest function for QA evaluators is to provide feedback and coach their agents, but this is also the most valuable activity in the entire program. Take the time to build an effective training program to teach QA evaluators how to deliver positive news and constructive advice.

Activity 9: Develop a QA training program to kick off the new omni-channel QA initiative, and which will become a standard module in the agent new-hire training program. Be sure the training program explains the reasons why QA is performed, how the QA process and coaching sessions work, the benefits of QA for agents, customers and the company, and exactly how QA impacts their evaluation and compensation. Emphasize the collaborative intent of the QA program, and invite feedback into the process.

Activity 10: When a new QA initiative is introduced to provide visibility into many channels where agents were not monitored in the past, it's important for the staff

to have time to get accustomed to the new process. Some companies pilot the program for a couple of months, and others give agents many months to get used to it. The amount of time dedicated to the pilot will depend on the culture of your organization and recommendations from HR.

Activity 11: It takes trial and error to create an effective QA program that is right for your company and employees. The most effective QA initiatives are the ones where management is flexible and continuously enhances the program and evaluation forms, as transactions and customer expectations are constantly evolving.

Activity 12: After preparation is complete, the staff is fully trained on what to expect, and QA evaluators have been taught best practices for coaching and providing feedback, it's time to implement the program. This should be done with a good deal of fanfare, so no one is taken by surprise.

Activity 13: QA is dedicated to continuous improvement, and it should be the priority for the program, as well. The best QA programs are initially effective for only 9 – 12 months, at which point the entire initiative should be reviewed, QA forms updated and enhanced, and new techniques identified to improve staff performance. Every time a new channel is added, take the opportunity to rethink the entire customer journey and how best to capture and evaluate how well the contact center and its agents are performing.

Project Dependencies

There are three dependencies for this plan. First, the contact center needs an omni-channel QA application; secondly, they need up-to-date policies and procedures; and third, they need a training program to teach the staff how to handle interactions in all channels. Many companies are using dated QA solutions that have not been enhanced in 5+ years. If this is the case, it's time to invest in an omni-channel QA solution capable of doing the following:

1. Capturing, retrieving and replaying interactions from all channels, calls, email, text/SMS, online chat and social media in a regulatory compliant manner, so they can be used for omni-channel QA evaluations
2. Allowing the company to add new channels as they are introduced into the contact center environment
3. Giving agents access to their recorded interactions and evaluations so they can learn from past performance and self-correct
4. Generating dashboards and reports to enable management to analyze the performance of the contact center and customer experience

The Benefits of an Omni-Channel QA Program

Well-designed and implemented omni-channel QA initiatives deliver many benefits, as seen in Figure 2. These programs enhance both the customer and agent experience, while reducing cost and risk for the enterprise.

Figure 2: Omni-Channel QA Benefits

	Customer	Enterprise	Contact Center	Agent
Customer Experience (CX)				
Improved CX	✓	✓	✓	✓
Enhanced omni-channel journeys	✓	✓	✓	✓
Consistency throughout the journeys	✓	✓	✓	✓
Improved NPS	✓	✓	✓	✓
Better transaction quality	✓	✓	✓	✓
Fewer errors	✓	✓	✓	✓
Employee Experience				
Increased employee engagement and satisfaction	✓	✓	✓	✓
Reduced agent attrition	✓	✓	✓	✓
Enterprise Opportunity				
Increased up-sell/cross-sell	✓	✓	✓	✓
Identification of business opportunities and trends	✓	✓	✓	✓
Improved operating policies and procedures	✓	✓	✓	✓
Enhanced brand	✓	✓	✓	✓
Reduced enterprise risk	✓	✓	✓	
Productivity				
Increased first contact resolution	✓	✓	✓	✓
Improved agent productivity	✓	✓	✓	
Reduced operating expenses		✓	✓	

Source: DMG consulting LLC, January 2017

Final Thoughts

As more companies migrate to omni-channel service delivery and focus on the customer experience, it's essential for them to build a QA program to provide visibility into the performance of their staff throughout the customer journey. QA is a mission-critical function that enables management to oversee employee activities while identifying customer trends and reducing enterprise risk. QA initiatives are intended to improve quality, and they offer the added benefits of engaging employees and reducing operating costs at the same time.

About ZOOM International

Numerous analysts, 1500+ customers, and 300+ partners across 90+ countries have consistently awarded ZOOM International best-in-the-industry customer satisfaction scores—with an 82% net promoter score. ZOOM workforce optimization software helps contact centers improve customer experiences, lower costs, and generate profits by capturing, analyzing, and improving the quality of all contact center interactions while addressing compliance, risk, and regulations. ZOOM's Call Recording architecture has solved some of the most technically challenging requirements in the world, and the new ZOOM Omnichannel Search Engine is the first of its kind in the history of the industry. The company has 11 offices worldwide, has operated since 1999, and has two centers of operation—Franklin, TN, and Prague, Czech Republic.

About DMG Consulting LLC

DMG Consulting LLC is a leading independent research, advisory and consulting firm specializing in contact centers, back-office and real-time analytics. DMG provides insight and strategic guidance and tactical advice to end users, vendors and the financial community. Each year, DMG devotes more than 10,000 hours to producing primary research on IT sectors, including workforce optimization (quality management/liability recording), workforce management, performance management, speech analytics, desktop analytics, text analytics, customer journey analytics, surveying/voice of the customer, voice biometrics, cloud-based contact center infrastructure, dialing, interactive voice response systems and proactive customer care. Our actionable solutions are proven to deliver a lasting competitive advantage, and often pay for themselves in as little as three months. Learn more at www.dmgconsult.com.

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