ABSTRAKT

BUILDING A REPEATABLE CALL QA PROCESS

What to expect in this document:

- How to create a QA framework
- Questions you need to answer in order to build a repeatable process
- Different QA framework examples
- Best practices from companies across industries
- QA audit checklist you can steal

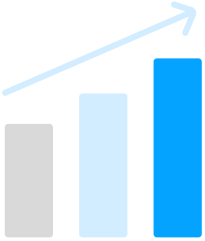
Creating a QA framework

Creating a solid QA framework has three parts:

Establish the metrics that define good quality service or sales calls.

Legal and regulatory needs for your given industry to remain in compliance with state and federal laws.

Collect data on how agents are performing against these metrics.



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Creating a QA framework continued...

To start, we always suggest that you answer these four questions:

☐ **1. What KPIs are you going to measure?**

There's no "one size fits all", unfortunately. This is why we've detailed a checklist for you below to help you determine the best path forward.

If your call center receives thousands of calls per day it would be advantageous for you to focus on the average handling time (AHT). Other call centers might prefer to prioritize customer service, so they will likely focus on first call resolution (FCR) or net promoter score (NPS).

You'll want to measure multiple metrics to ensure you have a well-rounded QA structure.

Avg Handle Time

First Call Resolution

Net Promoter Score

Customer Satisfaction Score

Calls Handled

Avg Call Abandonment Rate

☐ **2. How will you monitor, measure, and analyze these metrics?**

You can utilize a number of methods to monitor your agent's performance and analyze the data. Utilizing software can help remove the manual process from some of these options.

1. Paid surveys
2. Call scorecards
3. Call recording and call sessions that are highlighted for review from your automated QA software

Creating a QA framework continued...

☐ **3. Based on the data, what steps will you take to improve these numbers?**

This will be based on the metrics you decide to measure.

Examples:

Do your agents have a high handle time (AHT)? This is where software like Abstrakt that provides real-time dynamic responses might come in handy. Or additional training to further develop knowledge and skills.

Do your agents struggle when call volume is high? Finding ways to ramp up faster using virtual chatbots might be the right solution for you. You can find even more examples that dive into IVA in the Abstrakt + SmartAction webinar.

☐ **4. Based on your industry, what is a must-have in order to remain in compliance?**

This is always the top priority, but most companies understand this which is why it's number four on our list.

For example, more recently Medicare started requiring 10% of all calls to be monitored and/or reviewed to remain in compliance with federal regulations.

Other industries have to read certain statements word for word otherwise they could be penalized if they are ever audited. It's important to know these laws and find a QA framework that works to help you remain compliant.

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Ways To Think About Your QA Framework

Operational QA

Focus: "Day-to-Day"

You're measuring the daily tasks of your agents. Identifying top performers versus those who need extra attention.

This is great for the supervisor level when it comes to training and developing your agents, however, it doesn't allow you to necessarily see the big picture.

Ex: How is your team impacting top-line revenue and growth?

Tactical QA

Focus: The Customer

What are the common issues your agents are facing? What habits negatively impact the customer? What workflows or processes need to be changed?

In all, this framework will allow you to identify the root cause of your low performers.

Strategic QA

Focus: Alignment Between Teams & Business Goals *(aka revenue)*

Metrics generally focus on net promoter score (NPS) and how likely your customers are to recommend your company based on their experience with your agents.

This is driven by the culture, standards, and impact your top executives have on the company for long-term results.

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Best Practices for a Repeatable QA Process

☐ **Standardization of processes**
Define and document each step that you want agents to follow. This allows for more accuracy when scoring calls to give an unbiased assessment of agents on their performance.

☐ **Automation**

With the advancements in AI technology, there is no reason your team shouldn't be automating QA and call scorecards. There will always be a need for human intervention to review calls that are flagged, but automation will save both time and money. Plus it reduces the risk of human bias or error.

☐ **Ensure all channels are being monitored**

If your customer service or sales team uses chat, that needs to be included in the QA process. Most companies just think about phone calls due to the regulations, but chat is just as important.

☐ **Let agents dispute bad scores**

There should absolutely be a way to leave feedback in your QA process as well as allow agents to respond. There may be a specific part of the call that was missed and needs to be reviewed again.

☐ **QA software should work for you, not against you**

Feedback forms and coaching forms, when used, should be built into the same software as being used to automate call scorecards and QA. Your software should be able to solve multiple problems, allowing you to keep everything within one platform.

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Quality Assurance Audit Checklist

In the following checklist, examples of the specific information are below each checklist item and can be added/removed as needed.

- ☐ **Securing The Call Greeting**
  - Prepared for call
  - Answered call within 20 seconds
  - Identified yourself and your company
  - Verified caller's identity
  - Compliance Statement
  - Confirmed reason for the call
- ☐ **Confidence & Use of System**
- ☐ **Product/Service Knowledge**
  - Identified or created a need
  - Explained benefits
  - Described capabilities
  - Informed customers of upsells/add-ons
  - Limited the use of jargon or technical speech
- ☐ **Problem-Solving Ability**
  - Asked appropriate questions
  - Took ownership and assured willingness to help
  - Demonstrated empathy
  - Restated customer needs
  - Set expectations and timeframe
- ☐ **Established Correct Transfer Procedure *(if applicable)***
- ☐ **Wrap-Up Process**
  - Restated actions taken
  - Explained next steps
  - Offered additional assistance
  - Thanked the customer for calling
  - Waited for the customer to hang up first
- ☐ **Confirmed First Call Resolution Achieved**
- ☐ **All Legal Regulations Followed**
- ☐ **Agent's Overall Professionalism**
- ☐ **Summarize Feedback for Agent**

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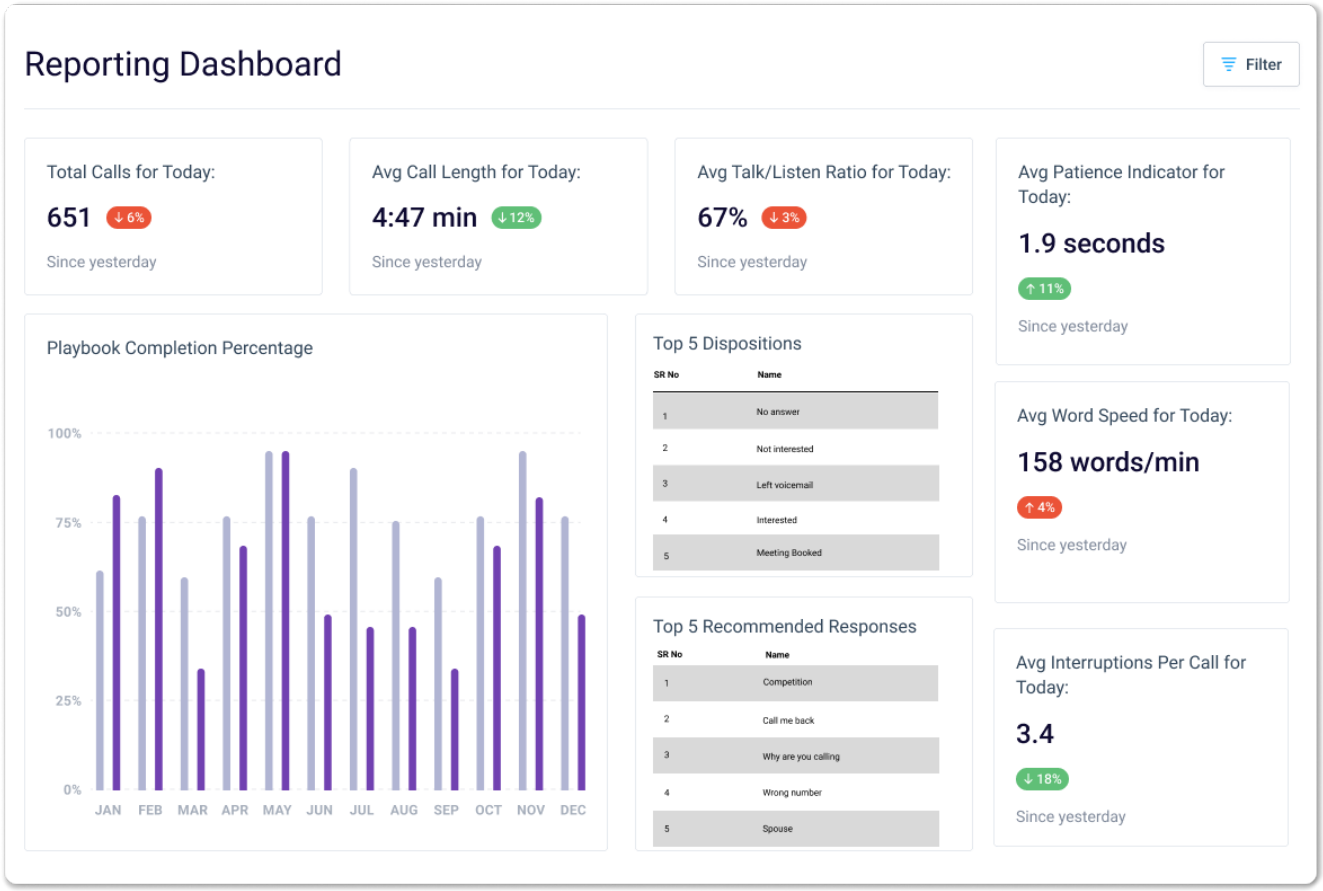
Looking to automate your QA and reduce the amount of manual work for you and your team?

Get complete visibility of every call in REAL-TIME. It's time to automate trust and ensure your team is compliant.

Abstrakt tells you which calls need your attention, and where exactly to listen. Plus every call is now scored, automatically.



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