IMPROVING CUSTOMER SATISFACTION THROUGH QUALITY MONITOR CALIBRATION

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CREATING THE UNCOMMON CALL CENTER

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Abstract

How do you use call monitoring to measure quality? You take the necessary steps to define and standardize it through calibration sessions, regular meetings that bring together the resources of the center to target those behaviors that result in customer satisfaction and loyalty. As the article explains, calibration sessions offer benefits above and beyond providing managers the ability to monitor fairly and accurately.

Discover the who, what, when, where, how, and why of calibration sessions. Avoid the "Seven Deadly Sins For Call Monitors." Ensure monitors and managers agree on what behaviors they are looking for and recognize them when they see them.

If a quality monitoring program is implemented without calibration rules, agents are not confident in the results. This article teaches companies how to create a company-wide yardstick of excellence.

Improving Customer Satisfaction through Quality Monitor Calibration

Kathryn E. Jackson Ph.D.

Okay, so you have this really neat call monitoring form developed. Your entire management team is psyched. You make a bizillion copies and start monitoring. The next thing you know -- you've got a mutiny on your hands. Front-line agents are screaming "unfair." Monitors are arguing over who's right and wrong. And you're spending all your time trying to arbitrate peace.

What went wrong? You didn't calibrate.

To calibrate (according to Webster) is to standardize. In contact center terms, to calibrate is to standardize the scoring of the quality of customer interactions. To calibrate, you need clearly defined job proficiencies and finely tuned ears (read on).

Why Calibrate?

Calibration silences the cries of "unfair" and establishes what's "right" and what's "wrong." It accomplishes these lofty goals by:

Ensuring consistent scoring
Multiple people monitor customer interactions in contact centers Calibration ensures consistent scoring. Once calibrated, the scores of Monitor A and Monitor B are comparable. It's as if one person scored all the calls.

Increasing confidence
Calibration raises people's confidence in the quality scores. Since the scores of Monitor A and Monitor B are standardized, everyone can trust the validity of each score.

For example, let's say two people are monitoring my customer interactions. Monitor A listens to a call and gives me a score of 78% attribute the variance?

Without calibration, I would instinctively say the scores were more a reflection of the monitors' ability than my ability (that is, one monitor scores higher than the other). However, when calibrated, there has to be another reason -- maybe the caller before the 78% call was abusive and I had not quite recovered. Perhaps the 78% call required skills that I have not yet mastered. Calibration builds confidence in the accuracy of the quality scores thereby narrowing the focus for the cause of variation.

Improving the call observation form
As people get together to calibrate, they continually assess the accuracy of the job proficiencies defined on the form. Monitors continually improve the form by either adding new proficiencies or modifying / deleting outdated proficiencies.

Enhancing the definition of excellence
Each person enters calibration sessions with a unique definition of excellence. During calibration, the goal is to lift everyone's definition to the highest possible level. The final level is defined by the level of the person possessing the greatest insight to excellence and expertise, and the level of collaboration among the group.

Staying in touch
In calibration sessions, people continually ask, “What are we hearing from our customers and our employees that we have never heard before?” The team discusses the insights and puts action plans in place. The calibration sessions are a formal, scheduled opportunity to stay in touch and be proactive. Teams recognize opportunities and problems faster. They deal with a potentially “big problem” while it is still minor. Coaches react swiftly to opportunities to WOW a customer or employee.

Evaluating support mechanisms
Customer interactions are incredibly complex, as are the technologies and processes we put in place to support them. Calibration is an opportunity to check the policies, procedures, technology, and processes supporting the customer contact agent constantly. Monitors discuss the efficiency of these support mechanisms and determine if each person (both agent and monitor) is implementing them consistently and effectively.

Complementing training
Calibration provides incredible insight to quality customer interactions. Everyone should go through calibration. This not only heightens his awareness of excellence, but it also builds confidence in the monitoring process as well.

Who should be Calibrated?

The most effective implementations train everyone in the organization. These groups do not necessarily need to go through all fifteen hours of calibration. Many times two or three hours are sufficient to give people a “flavor” of excellence and help them gain confidence in the process.

As your company becomes more collaborative, you may want to calibrate the front-line agents fully so they can determine their own skill and knowledge needs. In this way, they take responsibility for their own growth within the organization.

Positions we have seen companies calibrate include:
- customer contact agents,
- administrative assistants,
- sales people,
- service or repair employees,
- counter people,
- trainers,
- quality assurance personnel,
- and, of course, monitors.

By calibrating multiple groups, a common language and approach to quality customer interactions develops. Such commonalties help build peer support and provide a built-in mechanism for reinforcing the skills learned. Excellence becomes a natural part of the organization climate. However, budget, staffing, and time restrictions often make it impossible to train everyone at once. In these situations a phased-in implementation is always an option.

How to Calibrate

If possible, you should tape customer calls for calibration sessions. If taping is not possible, then monitor live calls. As a third alternative, you can have people audio tape role plays.

Start calibration by simply discussing calls using the call observation form as a guide. Don't score each call. After listening to a call, have monitors answer the following questions:

- What was expert about this call?
- What would an expert have done differently?
- What "grade" (A through F) would best represent the quality of this interaction?

Once people feel comfortable with the broad definition of excellence (the letter grades will start to have some consistency about them), then you can start scoring the calls using the call observation form. At this point:

- Listen to a call.
- Score the call using the call monitoring form.
- List each person's score on a whiteboard or flip chart (without any discussion of why he or she scored that way).
- Choose the person with the lowest score to lead the discussion.

Why the lowest score? The low person's score indicates she heard more items that need coaching. Therefore, she can stimulate more discussion. Remember, her score might not be accurate. The score might reflect a combination of both valid and invalid "coaching opportunity" items.

For example, suppose you changed the policy about the number of times an agent is required to use the customer's name during a call. When you changed the policy, the "low scorer" was out on vacation and everyone forgot to tell her about the change when she returned. It is an opportunity for the group to communicate the new policy requirements.

During the discussion time, have someone record all the job proficiency nuances and recommended call monitoring form changes. You will use the nuances in training front-line agents and new monitors. The recommended changes will go to the monitoring sub-team for review and possible inclusion in the next call monitoring sheet revision. The nuances are critical to describe fully what the monitors will be listening for during a call. For example, as the group discusses the components for speaking skills, the nuances might look like this:

Voice quality: tone (nasal, breathy), pitch, accent, volume, projects energy, appropriately adapts to customer (anger—lower volume), sincerity, not patronizing, conveys the proper attitude and commitment.

Rate of speech: fast or slow, appropriately adapts to customer (anger—slower).

Word choice: positive language (focus on what can be done), non-words avoided (yep, uh huh, yeah), hot buttons (I can't, it's our policy, not my job), avoids jargon, what words are used or not used for acknowledgment (I see, I understand), not repeating same word over and over (okay), "How may I help you? (not "How can I help you?")

Once you have discussed each key skill, move on to the next call so people can apply their new understanding to the next situation. Don't haggle over the final score. It is the process of listening, scoring, recording, and discussing that enhances awareness and ultimately moves the scores toward standardization.

Calibration “Rules”

Agree to confidentiality.
Everyone must agree that all calibration sessions are confidential and that no one will discuss anything they hear outside the session. This is to ensure everyone (monitors and agents) feels safe.

Listen to the calls with a deadpan face.
This means no snickering, rolling of eyes, or commenting. The goal is not to influence someone else’s score. You want the scores to be a fair representation of each person’s definition, not a result of his trying to adjust to peer influence. Also, participants may incorrectly interpret a response as a “slam” on the customer contact agent’s level of expertise. Our message is that calibration is safe, and, if people are struggling with skill and knowledge, coaches are there to support them (not exploit them in a calibration session).

Each call must stand on its own.
Monitors may say, “Well, the agent usually...” or “What she meant to say was...” That call was the only opportunity your customer had to experience the quality of your company. Your goal is to look at quality from your customer’s perspective. When he got off the phone, what was his impression?

Be reasonable.
Remember, not all situations require the same type of interaction. Be sure to attach the words “when possible” or “if appropriate” to each skill. For example, you would not mark “struggling” for “Customer does not have to repeat information” if the agent asks the customer to repeat information due to background environmental noise.

Calibration Cautions

Each participant in a calibration session should guard against the following harmful attitudes and behaviors:

- Trying to defend or protect the agent on my team. If we are listening to one of my team member’s calls, I shouldn’t be interjecting things such as, “We are working with that.”

- Thinking there is only one right way. For example, there’s only one right way to solve the billing problem, to soothe an angry customer, and so on.

- Thinking my definition of expert is the best. We all have different definitions and help each other stretch to new heights.

- Thinking people can read my mind. “Why is the discussion going off on this tangent, certainly the people in calibration know...?”

- Thinking people speak the same language. Remember, words can have totally different meanings to different people. When I give an opinion and someone reacts negatively, it might not have anything to do with my idea. It could have to do with my word choice.

- Arguing rather than discussing with active listening. Calibration is not about being right or wrong. It’s about learning.

- The group is dividing into distinct “calibration camps.” We often want to find people who think and feel as we do because it feels comfortable. Sometimes we need to force ourselves to feel uncomfortable for a while.

- Discounting an idea that may seem obscure, too stringent, ridiculous, nit picky or "we'll never get there so why bother." One of our customers suggested we title the call observation form "Customer WOW Skills." This helps keep the perspective of why we are listening for areas to constantly improve. It's not "against" the customer contact agent, it is "for" the customer (which means ultimately for the employees and the company).

- Shutting down if the group does not accept an idea. We all take risks when we voice an opinion. Remember, when people do not agree with your idea, it is not a personal affront. If you feel strongly about something, stay in the discussion until you feel everyone fully understands your position. Then, make sure the conversation does not end until everyone reaches consensus. There is no such thing as a back door escape in calibration. No one can leave the session saying, "I know it sounds really weird. But that's what everyone else wanted. I was against it." Everyone must agree.

- Limiting the definition of excellence because we have limiting technology or procedures. If technology or processes are limiting your quality, then the teams should figure out how to overcome that hurdle. Your customers certainly don't care about your inefficiencies—they expect excellence no matter what.

- Losing perspective. Calibration is not a one shot deal. It is a long process. Don't be dismayed by hours of discussion. Don't become exasperated with people who want to continue even though everyone else is ready to quit. You won't get there overnight.

- Autocratic or democratic decisions. The definition of excellence is a result of collaboration and consensus. You don't vote for what is best. You don't make decisions based on "what everyone can live with." You make decisions that are absolutely the best for everyone involved—the customer, employee, and company.

- I'll do my own thing anyway. Everyone must accept the consensus of the group. You cannot go off and design your own rules to play by. For example, "I'll just give partial credit if I think a person has 'kind of' mastered a key skill." Or, "I disagree with the definition; therefore, I'll give in during calibration, but when I monitor, I'll use my own definition."

- Vague definitions. The definition must be reproducible so front-line training can occur. You cannot hold someone accountable for something you cannot define or teach. Agents' calibration sessions help accomplish this by letting them hear examples of the definition.

The Seven Deadly Sins for Call Monitors

When you go through calibration sessions, watch for the following telltale comments from monitors (be sure to check your own thought process as well). Each of the following will influence how you or others score the call and will undermine the intent of calibration. (Remember, there are no excuses -- each call must stand on its own.)

"What the agent was really saying is..." (No one has any idea what the agent meant to say except the agent.)

"That call was so much better than the rest of the calls I monitored today." (I should really give it a higher score.)

"That agent is always good on the phone. This was just an unusual call." (Classic example of each call must stand on its own.)

"That customer was exceptionally rude. It's no wonder the agent..." (was rude right back?)

"Compared to all the other agents in the department..." (Quality scores are never a comparison of other agents. The scores reflect how the person's expertise compares with "the best we can be.")

"Since all of the information was correct, that was a very good call," or worse, "Since the agent was so nice, it doesn't matter that he slipped up on that one piece of information." (Quality calls contain both correct information and courtesy. Never sacrifice one for the other.)

"I am sure another supervisor would have graded this call this way." (Watch out for peer pressure, especially if a supervisor is new. If a new supervisor's scores are lower than the scores of veteran supervisors, there may be pressure to raise them.)

When Are You Calibrated?

When your team is scoring calls within a certain tolerance level, you are considered calibrated. For example, you could choose plus or minus three percentage points as an acceptable tolerance. That means all the scores are within six points of each other. To choose an appropriate tolerance, answer these questions:

- What feels safe to the front-line? (That is, what tolerance level maintains confidence?)
- What is reasonable—what allows for natural variation?

When first starting this process, Response Design recommends plus or minus five percentage points as a calibration tolerance definition. Don't discourage monitors by establishing an impossible tolerance from the start. At first, the scores will reflect wide variations. To get to plus or minus five percent usually takes anywhere from 10 to 15 hours (or more) of calibration.

Five percent may seem too wide for your organization. If so, readjust it to your comfort level. You'll find that once your team has been calibrating for a while, a more narrow tolerance may be possible.

The calibration process is continual. Calibration does not last forever. Over time scores drift apart. Monitors learn new insights, policies and procedures change, and some people just forget. This means the scores go out of tolerance. When that happens, simply get back together for additional calibration sessions. These "fine tuning" sessions don't take long. Our experience is anywhere from two to four hours a month keeps your group calibrated.

Many companies schedule periodic calibration sessions -- one hour per week or two hours per month. Find what works best for you.

Kathryn Jackson, co-founder of Response Design Corporation (RDC) and call center expert helps professionals get more from their call center. Response Design is the how-to source for integrating the call center into the customer relationship. Its independent consultants use call center web seminars, contact center consulting, call center tutorials, call center benchmarking, world class customer service articles, and best-in-class customer service practices to ensure you get the most from your call center investment.

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