



**QA from Scratch:
3 Ingredients You Need to Cook Up the
Ultimate QA Program**

okta



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Today's Agenda:



- Intro
- About Okta
- Okta Customer Service Operations
- Love Our Customers Initiative
- The Recipe: Restructure Existing Teams and Competencies
- The Mix
- How to Bake

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Okta Customer Service Operations

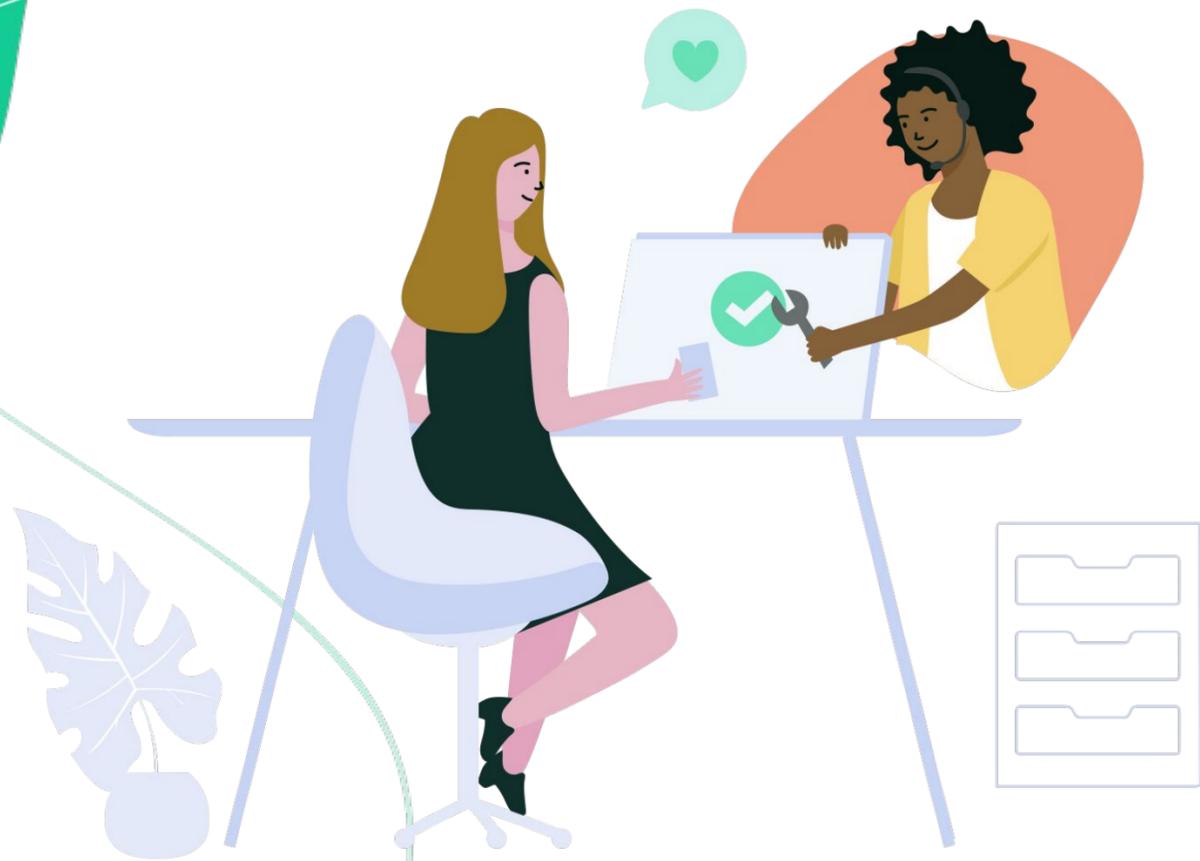


- High Level Org Structure
 - Operating on Email and Phone
 - Use Salesforce
- Playvox Products
 - Quality
 - Coaching (implementing)
 - Motivation (community)

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Love Our Customers Initiative



- Before Love Our Customers Initiative, QA criteria was process-driven
- Agents would do well on scorecard but the interaction would have low CSAT
- Now the QA criteria is behavioral-based
- Objective: Improve the customer experience by **empowering all** to **effectively prevent** and **expediently resolve** issues in use of Okta throughout the customer lifecycle.

The Recipe: Restructure Existing Teams and Competencies

- Train agents between specific Okta product areas.
- Structure new teams based on Okta product specialities
- Group agents by teams within Playvox



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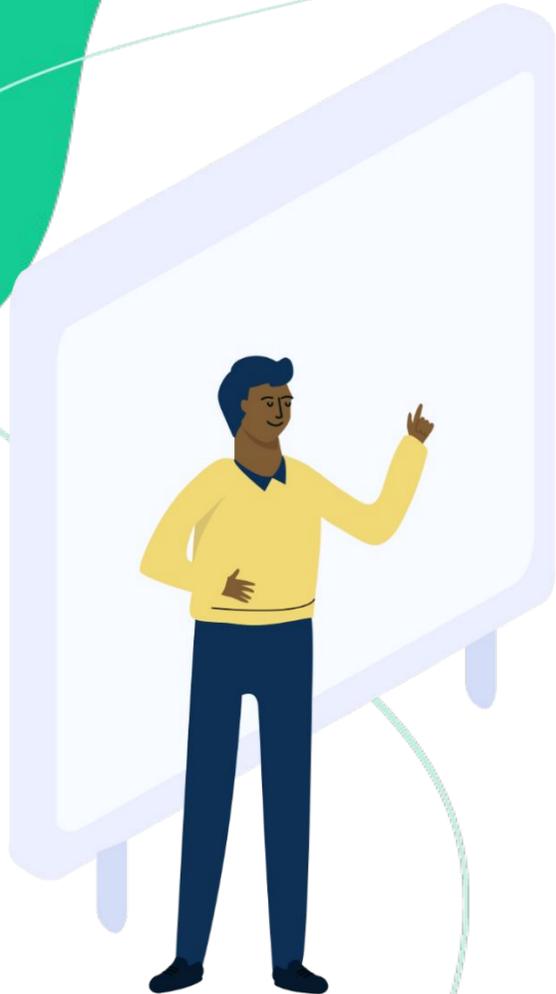
The Mix

- Re-train and re-engage management with new team priorities
- Recreate scorecards optimized for team structure (behavioral scorecards)
- Build, test, and train new scorecard methodology with management



How to Bake

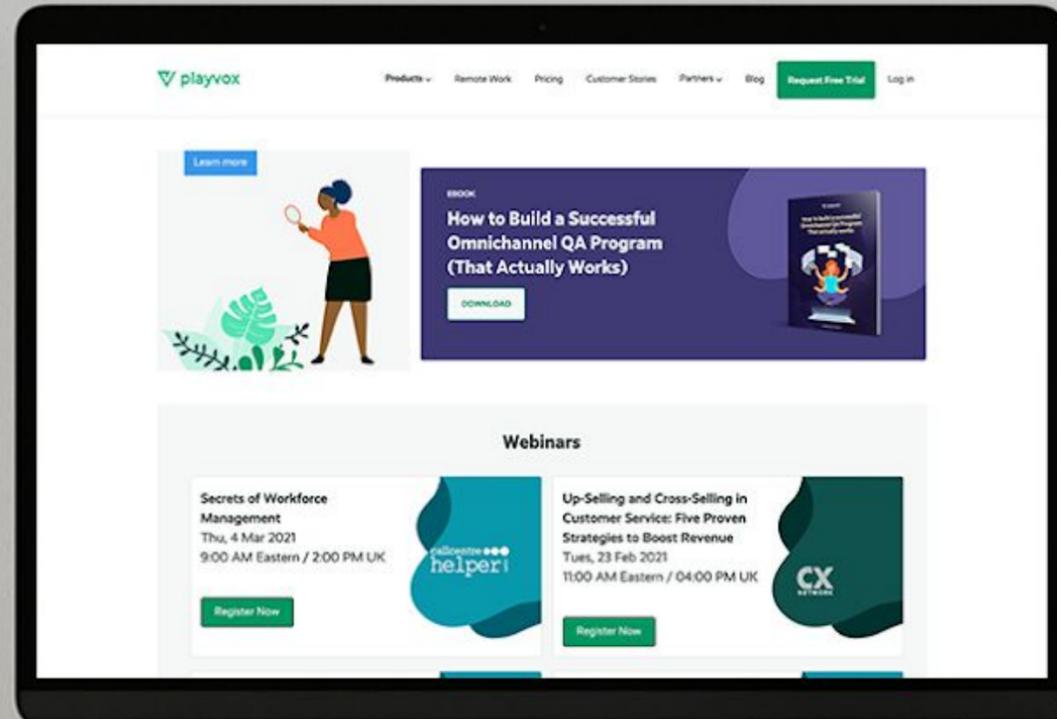
- Change Management
 - Calibrate and Test, before change
 - Engage agents during uncertainty
- Consistently communicate and coach to new scoring expectations
- Love our agents = love our customers



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Agent Optimization Suite

Motivation

Recognize and reward your agents with points that they can exchange for gifts, based on their Quality, Coaching, Learning and overall Playvox results.

Workforce Management

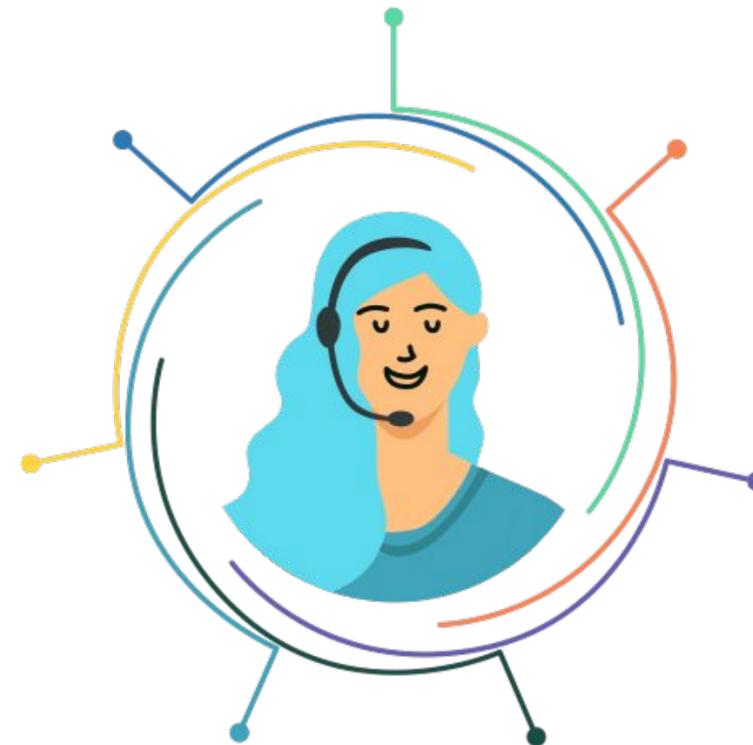
Intelligently forecast, schedule, and monitor your workforce without the need of specialized resources or data analysts.

Coaching

Solve and improve issues in: quality, behavior, compliance, soft skills, customer experience, among many others.

Quality

Easily identify and prioritize areas for skill development in your customer service teams.



Learning

Easily create and provide your customer service teams with online courses and quizzes to ensure continual skill development.

Performance

Track agent performance and measure the impact of your QA process.

Voice of the Customer

Translate customer sentiment into actionable metrics while delivering real-time feedback to your agents and team leaders.