



TOP TEN CHARACTERISTICS OF A WINNING QM FORM

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Why is the Right Quality Monitoring Form So Important?

- A quality workforce demands a significant investment in education and training, and processes continuously need to be refined
- Many quality monitoring programs “fail” because they show high scores but neglect to positively impact operational metrics or the customer’s view of the interaction

- Customer interactions are inherently rife with **risk**:
 - Reputation Risk
 - Regulatory Risk
 - Revenue Risk

They are often equally rife with **opportunity**.
Measure the execution of corporate cultural values to uncover opportunities in these risk areas and for revenue & reputation enhancement

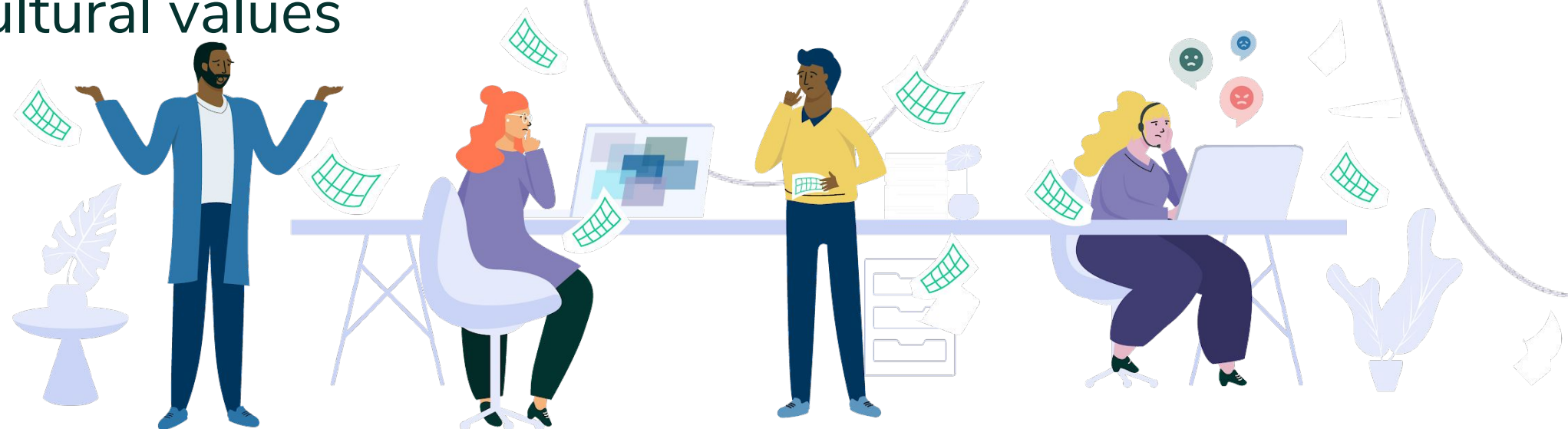


CHARACTERISTIC # 1:

SYNERGISTIC

The symphony sounds better when we're all playing the same tune

- Quality Assurance, Training, Incentives and Motivation all need to be on the same page!
- Culture drives, QM follows. QM works best when it is a granular measure of already-established cultural values
- Beware of contradicting messages





CHARACTERISTIC # 2:

RELEVANT

“One Size Fits All” works for hats, not for quality forms

- Most QM forms grow out of a combination of history (“In my old job we used to...”) and “instinct”
- QM materials from outside sources can be useful, but be sure they are relevant to your environment
- Elements that do not apply or are impossible for business reasons undermine the messages that are valid



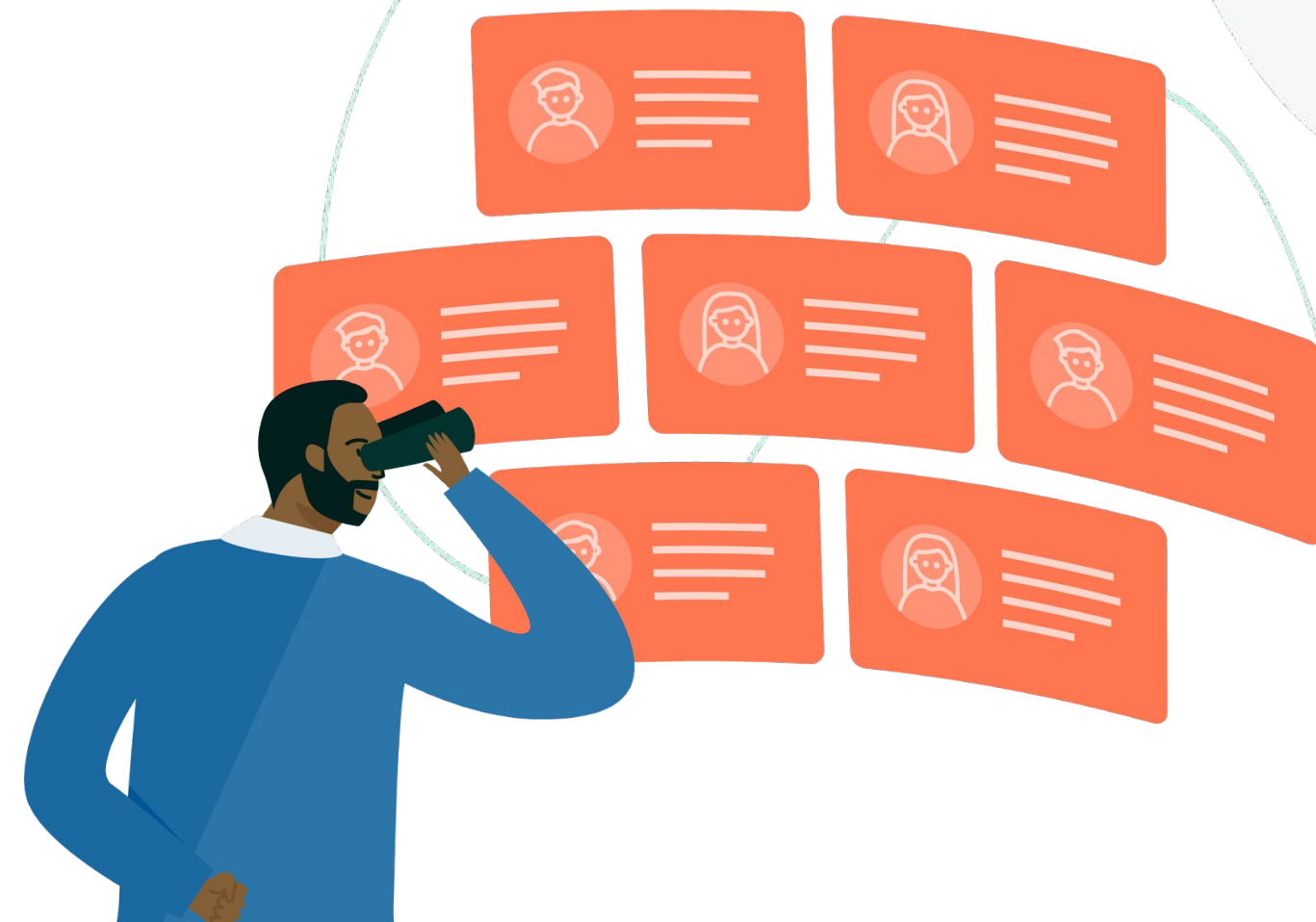


CHARACTERISTIC # 3:

CORRELATED TO GOAL

Don't forget where you're going

- Correct quality measures identify opportunities to improve customer satisfaction, increase sales, reduce agent turnover, improve customer retention, and enhance first contact resolution
- Measure the behaviors that trend, over time, to operational KPIs / goals



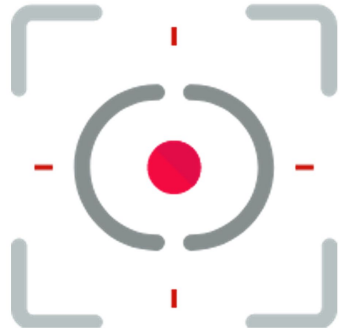


CHARACTERISTIC # 4: **BALANCED**

Be careful, your priorities are showing!

- Weights and measured behaviors should be in context to goals
- Balance the needs of the business with the needs of the customer
- Are you sending mixed messages?



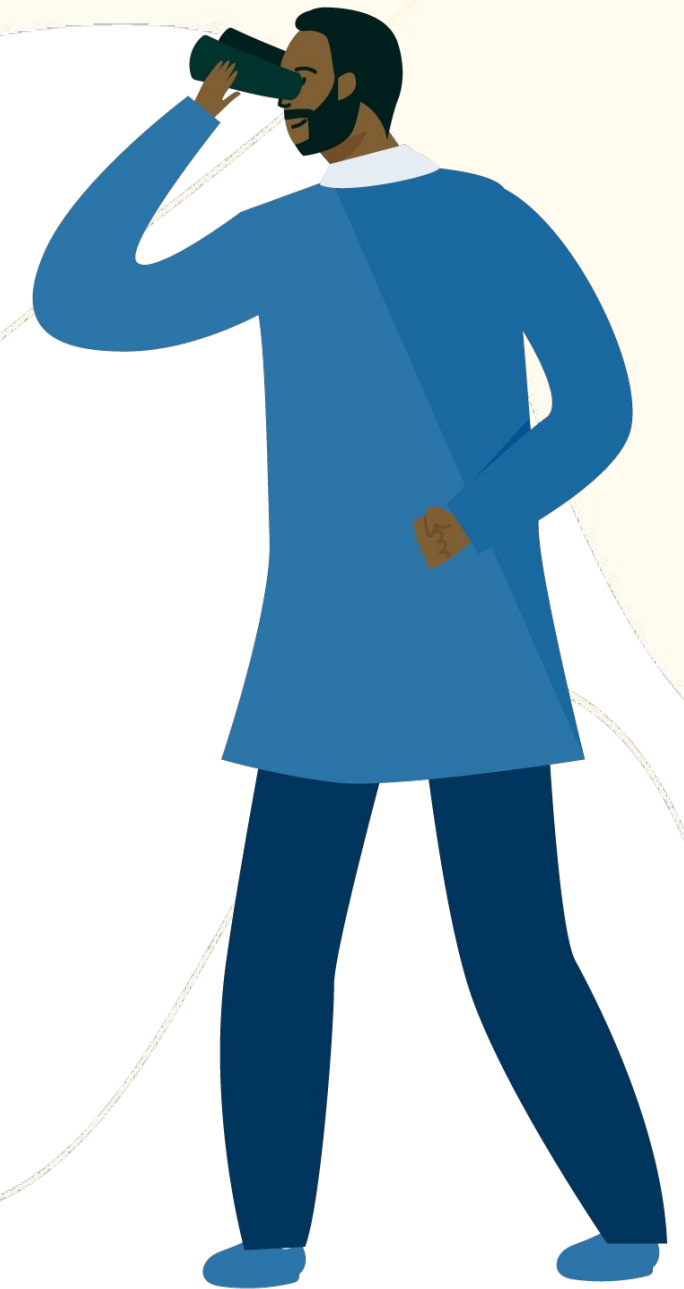


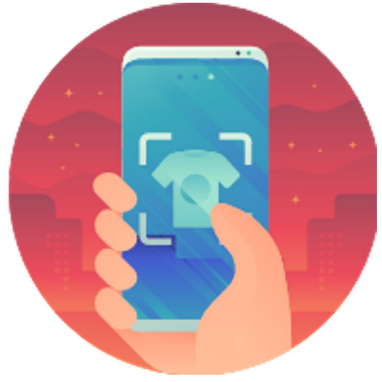
CHARACTERISTIC # 5:

CONCISE

Losing your way begins with losing your focus

- An effective QM form measures behaviors that matter, not every behavior that comes up
- Too many “goals” result in a lack of focus and clarity
 - Coaching becomes less effective
 - More time is spent accomplishing evaluations, and less time measuring progress from them
- TIP: Use correlation to goals and ongoing measures to determine which behaviors on the QM form matter and are highest priority





CHARACTERISTIC # 6:

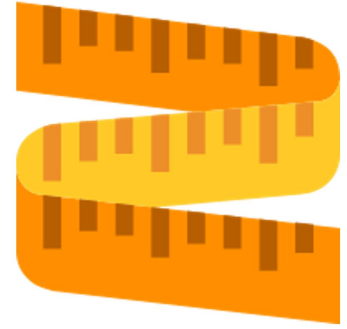
ACTIONABLE

The Late Night Instagram Shopping Dilemma (i.e. “It sounds good in theory, but will it be useful in the future?”)

Think ahead about the data being generated:

- Are we asking the right questions?
- What will we do with the data we generate?
- Is there other information that might be helpful?





CHARACTERISTIC # 7:

DEFINED

“So is this a 6.8 or a 6.9?”

- Evaluation criteria definitions enable clear checks and balances between cultural concepts and practical execution
- Empower employees to have the tools and knowledge they need to succeed
- TIP: Gradient scoring is a double-edged sword. Without it, you risk employees with “no room for improvement.” With it, you risk scoring anomalies.





CHARACTERISTIC # 8:

CALIBRATED

Garbage in, garbage out!

- Calibration is essential to ensuring that quality data is fair and accurately scored
- Failure to have procedures outlined that ensure accurate scoring...
 - Endangers the ability to use quality scores as part of employee development
 - Limits ability to make business decisions based on quality insights
 - Opens the business to potential employee lawsuits



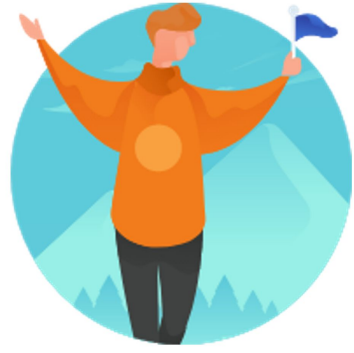


CHARACTERISTIC # 9: **EVOLVING**

Stagnant waters breed mosquitoes (and don't do a heck of a lot for your QM program, either)

- Avoid the pitfall of complacency
- Do the scores reflect what our customers tell us?
- Evolve a QM form that is not accurately reflecting opportunity for improvement and gaps between the cultural ideals and what is actually happening
- Continuous measurement will lead to controlled evolution





CHARACTERISTIC # 10:

CELEBRATED!

Inspire or Retire!

- Quality monitoring that is a natural extension of the culture inspires corporate pride, brand enthusiasm and a clear sense of identity
- QM forms developed “in a vacuum” inspire fear and distrust
- Ensure that all departments are familiar with and in support of the QM criteria before rolling it out
- Celebrate it as a way to identify those who exhibit the company’s cultural values on a daily basis. Reward based on it!



RECAP

Winning QM Forms...



1. Are in synergy with (and driven by) the culture of the company



2. Are relevant to your environment



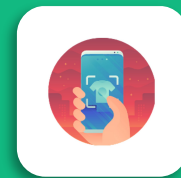
3. Measure behaviors which have an impact on your business goals



4. Balance the interests of the business and the customer



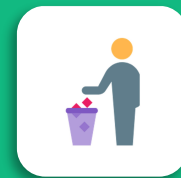
5. Are concise and focused on what matters



6. Provide actionable data



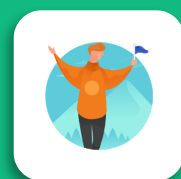
7. Contain clear and defined scoring variables



8. Are regularly calibrated to minimize scoring skew



9. Intelligently evolve



10. Are celebrated!

QM “Stump the Chump”

Question Time!



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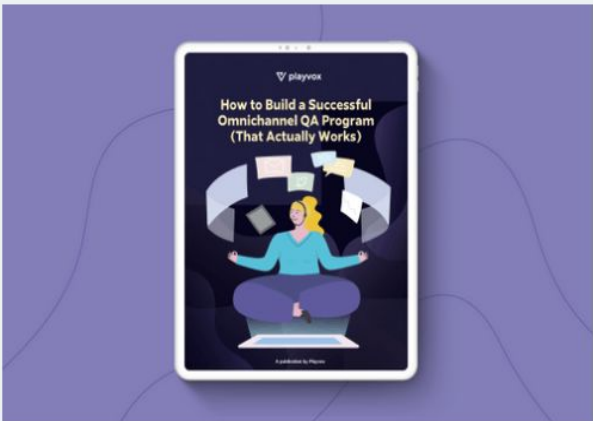
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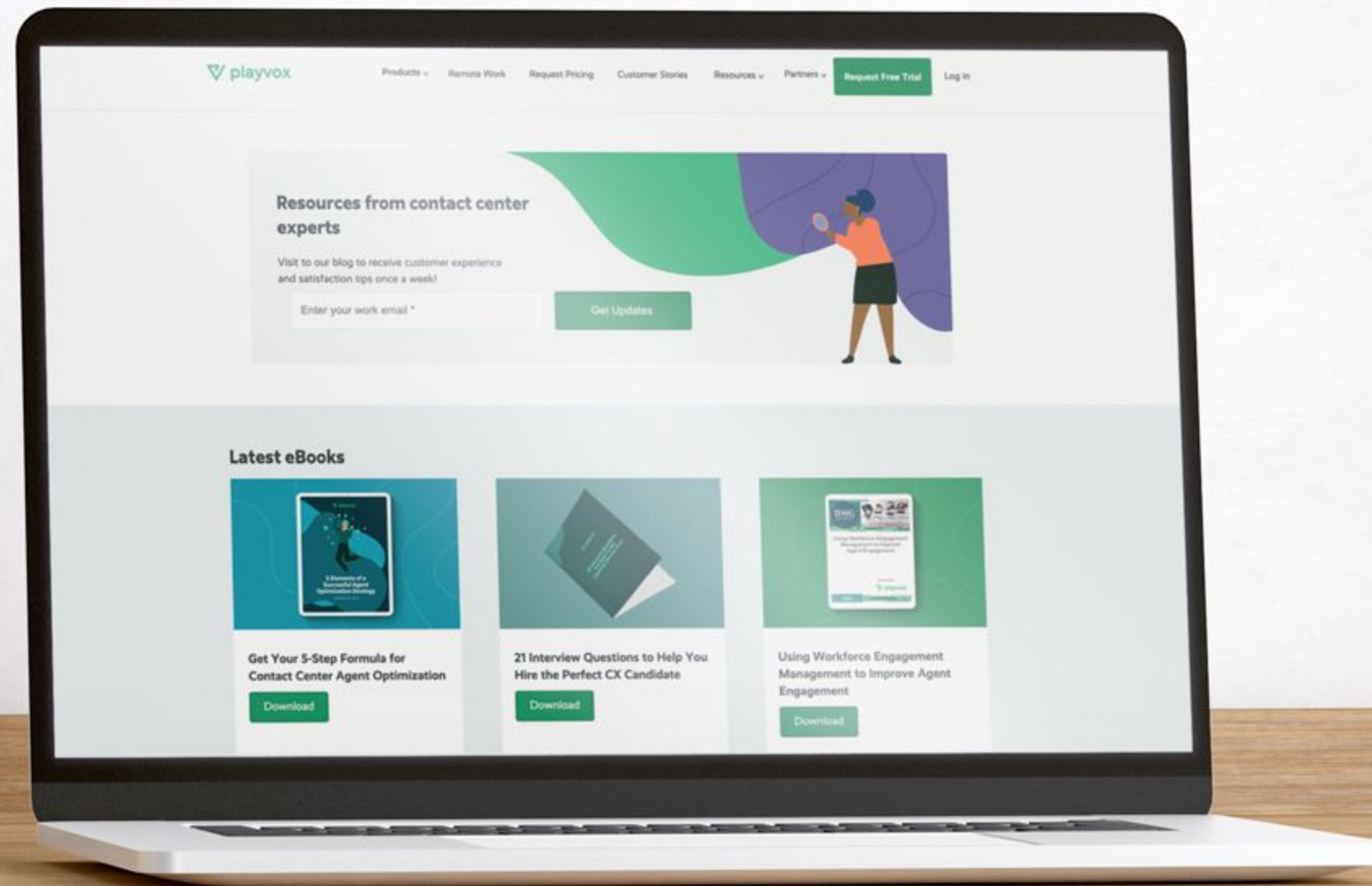


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