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Trust the Process:
How to Reduce Subjectivity
in Your QA Program

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Today's Agenda:

- Intro
- Process Documentation Common Mistakes
- All About Healthy Paws
- Healthy Paws Customer Service Operations
- Process Documentation: Where it currently stands at Healthy Paws
- Innovation in Process Documentation
- Subjectivity & Solving it
- Training Taboos + Tips

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Process Documentation Common Mistakes

- Why is process documentation an afterthought?

- **Common Mistake #1:** Seen as dry.

- **Common Mistake #2:** Not written from the perspective of the agent.

Healthy Paws Customer Service Operations

- Number of agents: 280+

- What your CS operates on: Phone, email, chat, claims

- Your role within Healthy Paws: Program Manager of Quality and Education

- Where you are based out of: HQ in Bellevue, WA, but teams around the world

POLL

Process Documentation Where it Currently Stands at Healthy Paws

- We have process documentation for nearly every situation that would present itself in an interaction.

- Documentation on: Veterinary medicine, case handling, call handling, flowcharts, insurance regulation/policy info, quality score cards, "red rules"

- Stored in a library of "Solutions" where they can search for tools quickly

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Innovating the Process Doc

- Insurance regulation = intricate details and a variation of processes at all levels

- All updates, messaging, etc. were once shared via email alone

- Asking the team what is most valuable to them

- Balancing ease of use with all relevant information

- Novice vs. Experienced learners

- Description, Question, Solution, Messaging, Seeking additional information

- Fun, colorful, visually pleasing and on brand

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Subjectivity

- **Different perspectives/experience levels lead to varying interpretations of cases**

- **Disputes and manager escalations**

- **QA already has a "bad rap"**

- **Addressing subjectivity makes for happier agents**
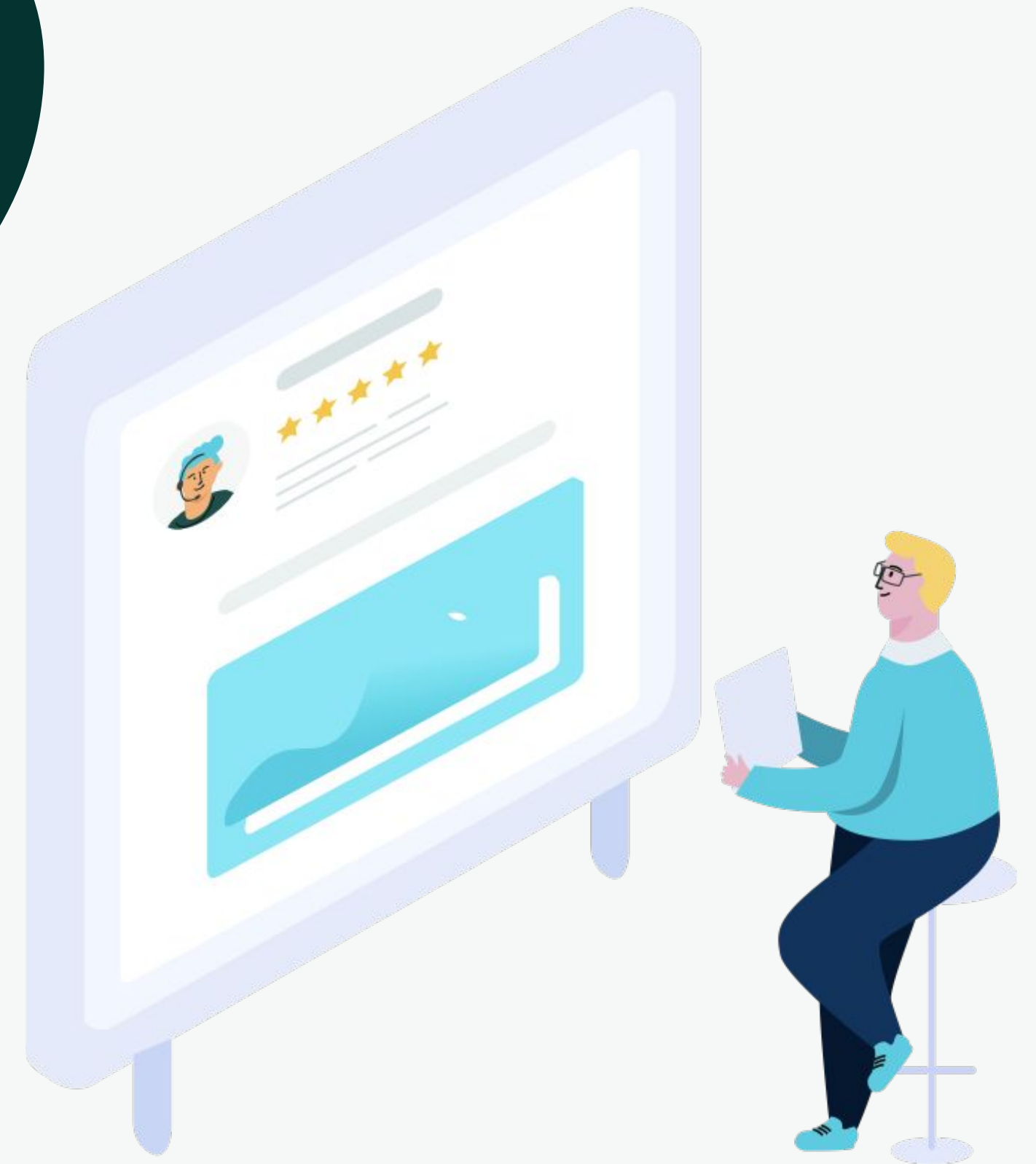
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Solving Subjectivity

- Very clear, specific instructions for case-type

- "Choose your own adventure"

- QA scorecard designed off of process docs

- Undefined situation = new doc

- Constantly updating

- Review and validated by several stakeholders

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Training Taboos + Tips

- Training taboos - "I was not taught that way, I've been here for 6 years and this is how I was trained." Process doc up-to-date, people can't really use that excuse

- How to use training to reinforce process docs

- Documentation = foundation of training