Best Practices Series

Making the Grade:
Using Automatic Scorecards to Improve Agent Performance

by Michael Dwyer
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Silence is Golden – Not!

Average Handle Time (AHT) is a critical part of every contact center’s performance metrics. Every second an agent is on a customer call costs the contact center money. Every second an agent is on a customer call but not speaking costs the call center money and frustrates customers. Understanding where breakdowns occur is critical to reducing AHT. Contiguous silence is usually an indication of a process break down. Slow transfer procedures, faulty IVR/ACD routings, sluggish mainframe connections, insufficient knowledge-bases, improper training — all of these little problems eat away at productivity and profitability — 10 seconds here, 10 seconds there — and soon you have minutes of unproductive AHT increases costs and making customers unhappy.

What do Unicorns + Happy Customers on Hold have in Common? Neither Exist.

One fact is certain however: when a caller is placed on hold while the agent looks something up or routed back into an IVR queue or transferred to another agent – the customer (your customer) is not happy. Eureka Speech Analytics identifies where these incidences occur, how often they occur and what you can do to eliminate them — whether they are an agent training problem or a procedural misstep. While traditional QM recording processes may track hold and transfer data from the ACD, only speech analytics can uncover “soft-holds.” We’ve all experienced these — the long periods of time an agent mutes their phone or stops talking while they “look something up in their system” — often leaving the customer having to eavesdrop on the background conversations of the other agents sitting close-by.

The Misfits – Measuring Outliers

Measuring call duration by agent, team or procedure can help an organization identify quality or service issues if call length for any category spikes low or high. Traditional QM processes often fail to uncover these issues — as those types of calls (quick transfer, long holds, lengthy trouble-shooting) normally do not fall into the target category of “normal calls” which are being selected for scoring. While you may also wish to disqualify these calls for normal agent scoring, it is very useful to be able to measure them and quickly discover their root cause for resolution.

Consumable Complexity !#$!$# The Cost of Delaying Change

The complexity of managing so many agents, who are interacting with a wide array of customer types and problems, is most times an overwhelming deluge. Decreasing the time it takes to discover a problem, implement change and measure its success has benefits — it eliminates the re-work associated with making bad decisions and allows you to advance to your next project reducing costs or increasing profits. CallMiner Eureka’s ability to bring additional speed to this rapid iteration of business process improvement helps drive the agile management practices of today’s successful enterprises.
Executive Summary

The measure of success (or failure) of a contact center is simply the sum of the performances of each of its agents. In order to improve agent performance a contact center must find a way to affect and sustain change in the behavior of every agent, on every call. Successful change has two critical components:

- Knowing what to change
- Determining what difference the change produced

When traditional Quality Monitoring and recording processes (QM) were introduced in the 1980’s, pieces of this guesswork were removed by allowing supervisors to retrieve “hard evidence” of a problem agent or process, and to compare agent performance on an “objective single scale or scorecard across the call center.” However, because traditional QM requires manually listening to entire calls, supervisors are unable to listen to a meaningful proportion of call volume. A quality supervisor often only assesses three to five (3 to 5) random calls per agent per month, equating to significantly less than one (1) percent of the total customer conversations.

Traditional QM provides a slightly more educated guess at the first component — What to change — but at a hefty price tag in terms of resources.

With Eureka® Speech Analytics, the seemingly impossible task of listening to 100% of customer conversations is now a completely automated and objective process. Eureka provides a “Tireless Supervisor” that listens to and scores 1,000’s of hours of recorded calls per day. And it does all this without the pesky need for caffeine, staff meetings, lunch breaks and vacation days. With real-time analytics that kick in upon call completion, and with Eureka’s ability to capture every part of the conversation — not just the keyword recognition that most traditional QM systems have bolted-on to their legacy systems — the result is a wealth of actionable information presented in a user-friendly dashboard with configurable scorecard metrics.

Eureka’s quality metrics enable contact centers to identify exactly where agents need help, and to continuously measure progress — successfully answering those two very important questions — What to change and what difference did the change produce.

40 Years of Trying to Accurately Assess Agents

Some 40 years ago, a brilliant engineer named Howard Walrath led the team at Rockwell International that invented the automatic call distributor (ACD) that gave birth to the modern contact center with computerized distribution of incoming calls. One thing that the first ACD-enabled call centers of the 1970’s have in common with their counterparts today, is the challenge of monitoring the efficacy of the agents fielding the incoming (or outgoing) calls.

Even with the best traditional quality monitoring process, a supervisor is severely limited in the number of calls for which they can evaluate or listen. Generally a quality supervisor will only have time to randomly assess less than one percent of an agent’s calls per month. And where an agent handles multiple call types, the problem is exacerbated – certain call types will not be represented at all in an agent’s monthly quality sample.

Is extracting and then assessing less than one percent of customer interactions a “fair” and “accurate” representation of an agent’s work product?

Imagine the same methodology applied to a student in high school or college. If a student takes an exam, and the professor was to randomly select 1 out of 100 questions on which to base his entire semester’s grade, would either the professor or the student accept this as an appropriate practice? No. Unfortunately, this is exactly the process employed by traditional QM processes.
Here’s the bottom line. This flawed approach means a supervisor might unknowingly listen to an otherwise strong agent on a weak call, or a weak agent on a good call — and draw all the wrong conclusions. With standard monitoring technology and associated call selection processes, it is nearly impossible to get an accurate picture of general agent performance.

If you then also consider that call scoring by humans involves significant subjective judgment, it is difficult to see how a traditional approach to quality monitoring can give a reliable basis for assessing the relative performance of agents compared with their peers or their own previous work. Unfortunately, it is even more challenging to gather meaningful data on specific performance —which can range from following basic agent etiquette to promoting special offerings or to following specific policies and procedures. Put simply: each call center has many agents fielding many calls, and it is tough to know exactly what is going on in that sea of spoken words — even when all calls are recorded.

**Speech Analytics: The Biggest New Thing since the ACD**

With the introduction of Eureka Speech Analytics and automatic agent quality scorecards, the Quality Monitoring landscape has shifted significantly. Customers agree:

“Eureka Speech Analytics, is, in a word, revolutionary. I believe it will change the way we do business as it quickly identifies our customer needs and our agents’ response. Eureka provides us with invaluable business intelligence.”

Divisional Vice President Customer Care, Bright House Networks

“The ability to combine individual words with acoustical and call data to reveal the true intent of what people say throughout every conversation, gives us the ability to automate agent scorecard reports on all calls for every agent across the entire contact center. (Eureka Speech Analytics) ... has helped to verify patient calls are handled properly, procedures are streamlined and agent training is customized to specific needs.”

Senior Director of Patient Access, NorthShore University Hospital System

“Eureka Speech analytics has added a new dimension to our agent coaching sessions. It allows us to hone in on areas of development without the need for arduous time-consuming call listening.

Head of Analytics, British Gas

With Eureka, quality supervisors are able to make informed, data-driven decisions, and can rest easily at night knowing that the effect of their decisions will be accurately measured and on their desk in the morning. Automatic scorecards save hours of “hunt and peck” searching through millions of recorded calls by quickly retrieving exact examples of an agent behavior in seconds.

**How Eureka Works → 100% Business Intelligence**

As Figure 1 illustrates, Eureka Speech Analytics automates the process of extracting business intelligence from the voice of the customer (actual calls or other interactions) discovering customer demands, market trends, agent performance and more. By mining the content of each call, including what is said, how it is said (agitation, tempo, et cetera) and the context in which words are said, Eureka helps organizations uncover hidden business intelligence within call center conversations.
Underlying Eureka Speech Analytics is powerful technology that simplifies the entire process of extracting intelligence from unstructured data. Among these Eureka tools are sophisticated call clustering, phrase frequency analysis, advanced search algorithms, metadata correlation and configurable visualizations including dashboards, reporting and alerting.

As a result, a quality supervisor can easily uncover all of the business intelligence that impacts his or her team’s performance, together with the relevant granular details correlated to process improvement and root cause analysis. Simply put, any process or agent behavior can be monitored. From whether your customers are talking more about the economy, competing services, or why they are (or aren’t) interested in cross-sells, or whether your agents have empathy – Eureka captures and categorizes all of this data.

**Dashboards and Scoring: An Instant Visualization of Performance**

Eureka dashboards as seen in Figure 2 and scorecards provide an instant view of the health of your contact center, while enabling a supervisor to dive into any metric for more call data — including a playback of the call that automatically queues to the point of interest.
From start to finish, quality supervisors can quickly assess whether a problem is a one-time occurrence, or a disturbing trend – and can retrieve hard-evidence to support their findings. With Eureka, a quality supervisor can review 20 examples of a specific behavior in less time than it currently takes to review a single call currently.

Eureka easily enables quality supervisors to define criteria based upon their enterprise initiatives, for example, sales and marketing effectiveness (cross-selling, customer retention practices, response to competitor mentions, ability to soothe an angry customer) and then measure performance against these metrics on a caller, group or complete contact center basis. In addition to evaluating individual agent performance, a dashboard scorecard could provide a view into how an entire team is performing across designated scored categories, as illustrated in the example shown in Figure 3 below. As a result, a supervisor might discover that an entire group of agents needs coaching on arranging callbacks, or taking ownership for situations, which would be a process problem. The same scorecards could also provide a total composite score for each agent, along with other metrics such as number of calls handled and average length of calls.

**Figure 3: EXAMPLE OF VARIOUS COMPONENTS OF AN AUTOMATIC SCORECARD**

<table>
<thead>
<tr>
<th>Agent Professionalism</th>
<th>Customer Satisfaction</th>
<th>Sales Effectiveness</th>
<th>Agent Efficiency</th>
<th>Effective Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Politeness</td>
<td>- Agitation %</td>
<td>- Introduces Offer %</td>
<td>- Over Validation</td>
<td>- Greeting # ____</td>
</tr>
<tr>
<td>- Understandability</td>
<td>- Silence %</td>
<td>- Up Sell %</td>
<td>- Takes Ownership</td>
<td>(Pass/Fail)</td>
</tr>
<tr>
<td>- Empathy</td>
<td>- Stress</td>
<td>- Cross Sell %</td>
<td>- Silence %</td>
<td>Closing or wrap up</td>
</tr>
<tr>
<td>- Insufficient</td>
<td>- Competitive</td>
<td>- Overcomes</td>
<td>- AHT Metric</td>
<td>Risky Language</td>
</tr>
<tr>
<td>Validation</td>
<td>Mentions</td>
<td>Objections</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**The Motivation of Continuous Metrics**

Since the birth of contact centers, one of the greatest challenges has been to achieve sustainable behavioral change. Coaching sessions and training can produce an uptick in the desired behaviors, but without the ability to continually measure progress such upticks have been short-lived.

Sustainable behavioral change can only be achieved with continuous positive reinforcement — and retraining if necessary. Eureka exposes these issues in near real time through its dashboards and reports — allowing the quality supervisors to make the necessary changes before any negative top-or-bottom-line impact can occur. The dashboard scoring enabled by Eureka Speech Analytics provides the constant clarity and peer review required in order to bring about behavioral change through positive growth and learning.

Because Eureka’s automatic scorecards for agents provide greater granularity on customer calls and agent performance, they can be significantly more valuable than traditional QM processes whilst also requiring significantly less resources. Eureka’s “Tireless Supervisor®” solution could augment or even replace traditional QM processes and generate a rapid ‘return on investment’ through cost savings alone.
Supplanting traditional QM processes with a single component of Eureka — automatic agent scorecards — can motivate change, and perhaps more importantly, provide a meaningful way to reward superior performance. Figure 5 below demonstrates exactly how automatic score cards provide a much better way to access agent performance.

**Figure 5: REPLACING TRADITIONAL QM WITH EUREKA SCORECARDS**

Detailed below are specific ways that contact centers can improve agent performance. Eureka has recommended best practices around achieving each, together with case studies developed by our enterprise customers.

<table>
<thead>
<tr>
<th>Perfect Coaching Session for Agents</th>
<th>Perfect Tool for Supervisors/Analysts</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Providing exact details to agents’ questions</strong></td>
<td><strong>Providing exact details to emerging issues</strong></td>
</tr>
<tr>
<td>• What kind of calls actually contribute to my score ➔ call volumes + qualification</td>
<td>• Is this an agent, group, LOB or contact center issue</td>
</tr>
<tr>
<td>• Am I being measured fairly and consistently</td>
<td>• Is it a department, product or process issue</td>
</tr>
<tr>
<td>• How am I doing</td>
<td>• How is the issue trending</td>
</tr>
<tr>
<td>• How do I stack up against my peers</td>
<td>• Who are the outliers</td>
</tr>
<tr>
<td>• Am I getting better or worse</td>
<td></td>
</tr>
<tr>
<td>• Where am I weak or strong</td>
<td></td>
</tr>
<tr>
<td>• Are these recurring problems or traits</td>
<td></td>
</tr>
<tr>
<td>• Do you have specific, relevant call examples</td>
<td></td>
</tr>
<tr>
<td>• Am I improving in the areas we agreed to in my last session, what are my new targets</td>
<td></td>
</tr>
</tbody>
</table>
Conclusion

Eureka Speech Analytics and its ability to produce automatic quality score cards provides contact centers the complete, consumable picture they need to positively and quickly effect change in the performance of its agents, while continuously measuring progress towards their overall goals. Organizations can easily configure their dashboard scorecards to measure the metrics they need, and then measure how individuals, teams and the entire operation are performing towards its goals. The precision of the automatic measurements enable call centers to go beyond the normal performance upicks associated with traditional QM coaching or training sessions to achieve an ongoing path of continuous improvement that is constantly monitored.

About CallMiner

CallMiner, Inc. is the leader in enterprise speech analytics, and analytics is its only business. CallMiner has the most advanced, “best of breed” speech analytics solution in the industry as evidenced by successful implementations at two of the world’s largest global financial institutions; the largest call center system in North America; the world’s largest software company; three of the world’s largest automotive collections divisions and several of the largest Institutional and third party collections firms in the world; and the #1, #2, #5 and #8 largest cable TV operators. For more information about CallMiner, please email sales@callminer.com, call (239) 689 6463, ext. 2 or visit www.callminer.com.

About Michael Dwyer

Michael Dwyer is responsible for integrating state-of-the-art advances in speech recognition and analytics technologies into CallMiner’s suite of products. Dwyer developed the server and database framework that underpins CallMiner Eureka and has delivered first and second generation products from concept to customer installation. Prior to joining CallMiner, Dwyer developed cutting-edge pattern recognition products for ID Software, and successfully completed the Information Management Leadership Program for GE Corporate. Dwyer has a Bachelors of Arts and a Masters degree in computer science from Case Western Reserve University.