



BEST PRACTICES SERIES

Using Automated Scorecards to Improve Agent Performance

Michael Dwyer

Vice President, Research
CallMiner Eureka



MOST CUSTOMER AWARDS
FOR BEST USE OF
SPEECH ANALYTICS



Introduction

When traditional Quality Monitoring (QM) and recording processes were introduced in the 1980s, call center supervisors were able to monitor agent activity and compare performance on a single scale or scorecard across the call center. However, because traditional QM requires manually listening to entire calls, supervisors often only assessed three to five random calls per agent per month, equating to significantly less than one percent of the total customer conversations.

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? Absolutely not. Unfortunately, this is exactly the process employed by companies using manual monitoring.

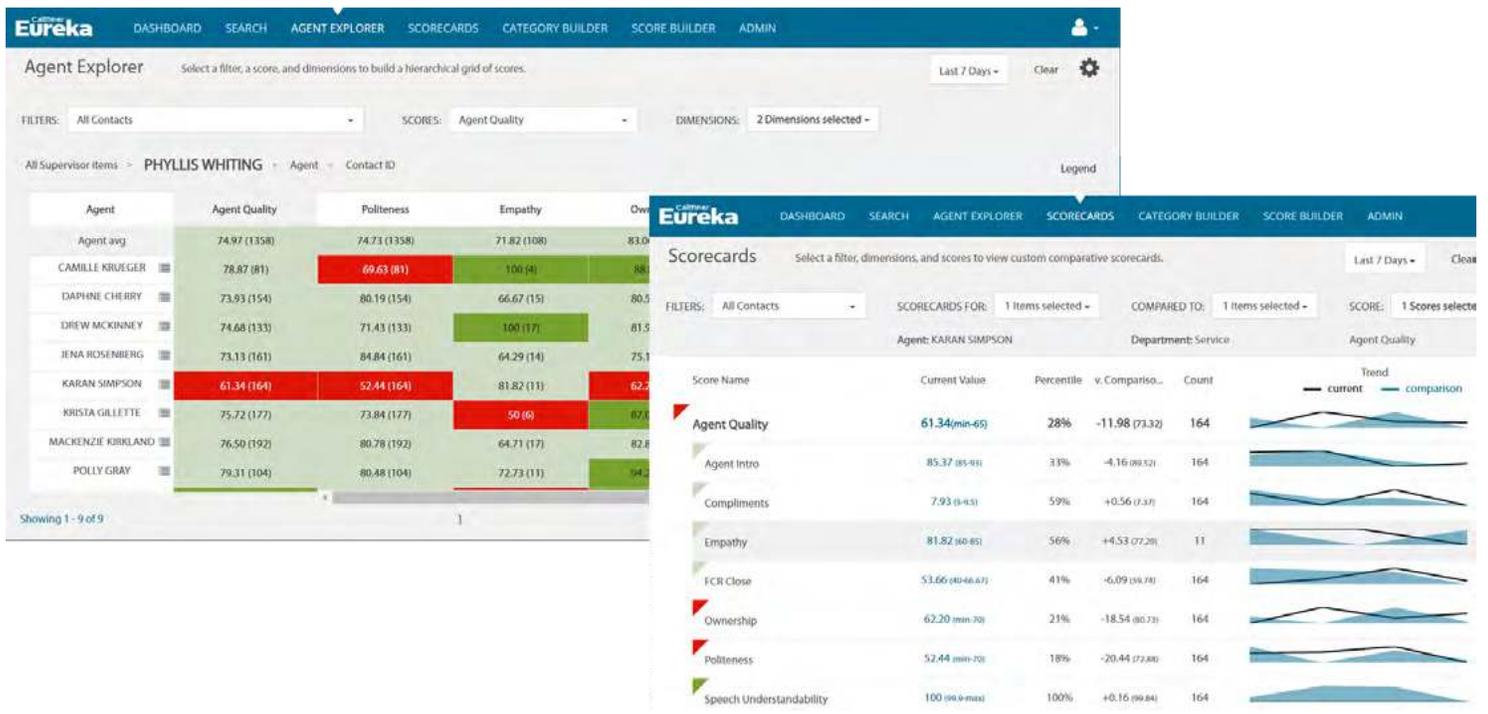
This flawed approach means a supervisor might unknowingly listen to an otherwise strong agent on a weak call, or a weak agent on a good call, and draw all the wrong conclusions. With manual monitoring and the associated call selection processes, it is nearly impossible to get an accurate picture of an agents overall performance.

If you then also consider that call scoring by humans involves significant subjective judgment, it is difficult to see how this approach to quality monitoring can provide a reliable assessment of the relative performance of agents compared with their peers or their own previous work. 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: Modern Quality Monitoring

With speech analytics, the seemingly impossible task of listening to 100% of customer conversations is now a completely automated and objective process. Speech analytics provides a "Tireless Supervisor" that listens to and scores 1,000s 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 analytics that kick in upon call completion, and the 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. Quality metrics from speech analytics enable contact centers to identify exactly where agents need help and continuously measure progress across key performance indicators.

Quality supervisors can make informed, data-driven decisions and can rest easily at night knowing that the outcomes of their decisions will be accurately measured and on their desk in the morning. Automated scorecards save hours of "hunt and peck" searching through millions of recorded calls by quickly retrieving exact examples of an agents behavior in seconds.



Automated Scorecards Provide Accurate and Consistent Feedback

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. Speech analytics exposes these issues allowing quality supervisors to make the necessary changes before any negative top-or-bottom-line impact can occur. Automated scoring of 100% of conversations provides consistent, accurate feedback to agents which is required to bring about behavioral change.

Because automated scorecards for agents provide greater granularity on customer calls and agent performance, they can be significantly more valuable than traditional QM processes while also requiring significantly less resources. With speech analytics, managers can compare key metrics across teams and business divisions, and quickly drill down to individual performers, or identify training opportunities across product, process, or business lines.

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 speech analytics, a quality supervisor can review 20 examples of a specific behavior in less time than it currently takes to review a single call.

Augmenting or even replacing traditional QM processes with a single component of speech analytics — automated agent scorecards — can generate a rapid return on investment from QA cost and time savings alone. It can also motivate change, and perhaps more importantly, provide a meaningful way to reward superior performance.

The screenshot below demonstrates exactly how automated scorecards provide a much better way to access agent performance.

Agent Explorer Select a filter, a score, and dimensions to build a hierarchical grid of scores. Last 30 Days Clear

FILTERS: Behavior SCORES: Agent Quality DIMENSIONS: 1 Dimension selected

All Agent items > Agent > Contact ID Legend

| Agent | Agent Quality | Politeness | Empathy | Ownership | Compliments | Speech Understand |
|-------------------|---------------|-------------|------------|-------------|-------------|-------------------|
| Agent avg | 44.42 (903) | 23.88 (903) | 26.33 (50) | 37.50 (903) | 18.93 (903) | N/A (0) |
| Mike McDaniel | 27.48 (3) | 0 (3) | 0 (1) | 33.33 (3) | 0 (3) | N/A (0) |
| Philip Marlowe | 35.91 (22) | 13.64 (22) | 0 (1) | 27.27 (22) | 18.18 (22) | N/A (0) |
| Clarissa Dalloway | 36.94 (26) | 11.54 (26) | N/A (0) | 26.92 (26) | 19.23 (26) | N/A (0) |
| Holden Caulfield | 37.65 (21) | 23.81 (21) | N/A (0) | 19.05 (21) | 28.57 (21) | N/A (0) |
| Sula Peace | 38.39 (20) | 10 (20) | 0 (1) | 23.75 (20) | 20 (20) | N/A (0) |
| Judge Holden | 38.99 (23) | 25.22 (23) | N/A (0) | 21.74 (23) | 8.70 (23) | N/A (0) |
| Leopold Bloom | 40.06 (16) | 25 (16) | N/A (0) | 25 (16) | 0 (16) | N/A (0) |
| Sebastian Flyte | 41.50 (24) | 25 (24) | 0 (1) | 29.17 (24) | 20.83 (24) | N/A (0) |
| George Smiley | 41.58 (26) | 26.92 (26) | N/A (0) | 30.77 (26) | 11.54 (26) | N/A (0) |

Showing 1 - 25 of 38
<https://training01.callminer.net:9003/#/ScoreBuilder>

Detailed below are specific questions that help monitor performance and drive improvements. Automated scorecards help identify answers to each of the questions.

Perfect Coaching Session for Agents

Providing exact details to agent's questions:

- What kind of calls actually contribute to my score? (call volume & qualification)
- Am I being measured fairly and consistently?
- How am I doing?
- How do I stack up against my peers?
- Am I getting better or worse?
- Where am I weak or strong?
- Are these recurring problems or traits?
- Do you have specific, relevant call examples?
- Am I improving in the areas we agreed to in my last session, what are my new targets?

Perfect Coaching Tool for Supervisors / Analysts

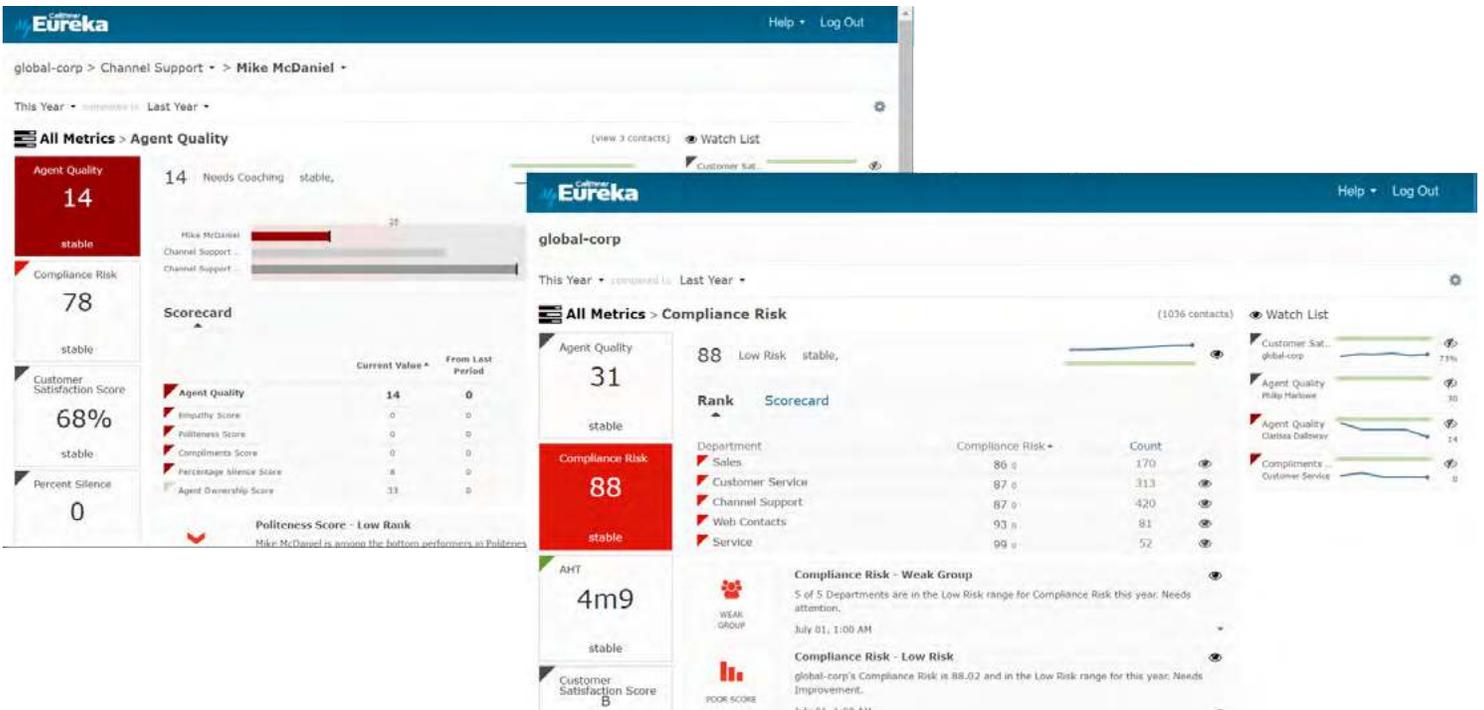
Providing exact details to emerging issues:

- Is this an agent, group, LOB or contact center issue?
- Is it a department, product or process issue?
- How is the issue trending?
- Who are the outliers?

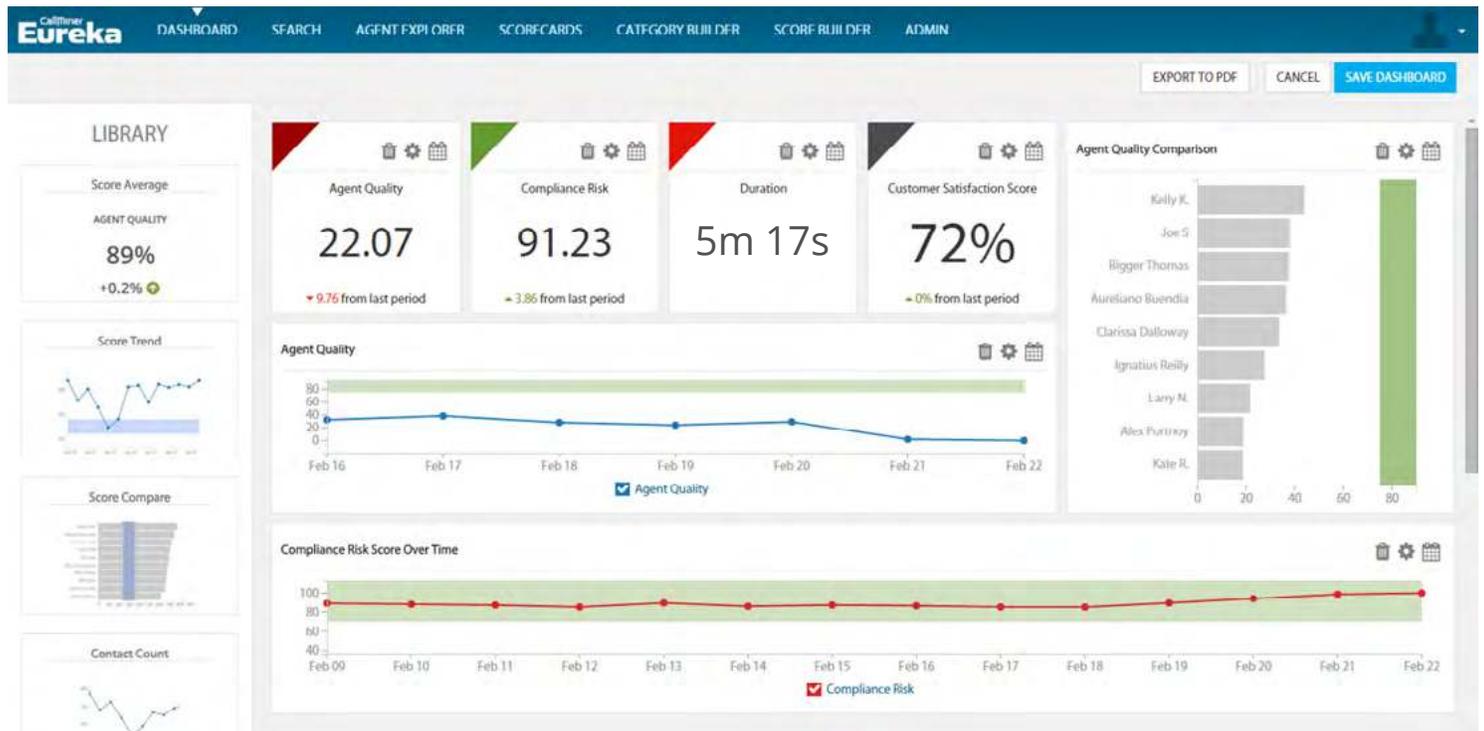
"Weekly scorecards proved invaluable in driving performance improvement. Supervisors now have an accurate view of agent performance and they use it for training and coaching purposes. We have been able to identify a direct link between agent advancement and his/her scorecard."

Mike Hull | Director of Business Analytics at TradeGlobal

A Single View of Performance Against Business Metrics



Speech analytics solutions with comprehensive dashboards, provide users with an intuitive, easy to configure interface that is 100% customizable to each user's specific set of needs and interests. Each user can select from a variety of charts and graphs and lay out the precise data specific to their user persona which they are interested in monitoring. Then a personalized layout can be saved and accessed at anytime with the touch of a button.



Speech analytics 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 above.

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. This enables supervisors to spend more time coaching and less time consumed with administrative work, leading to happier agents, better performance, and lower turnover.

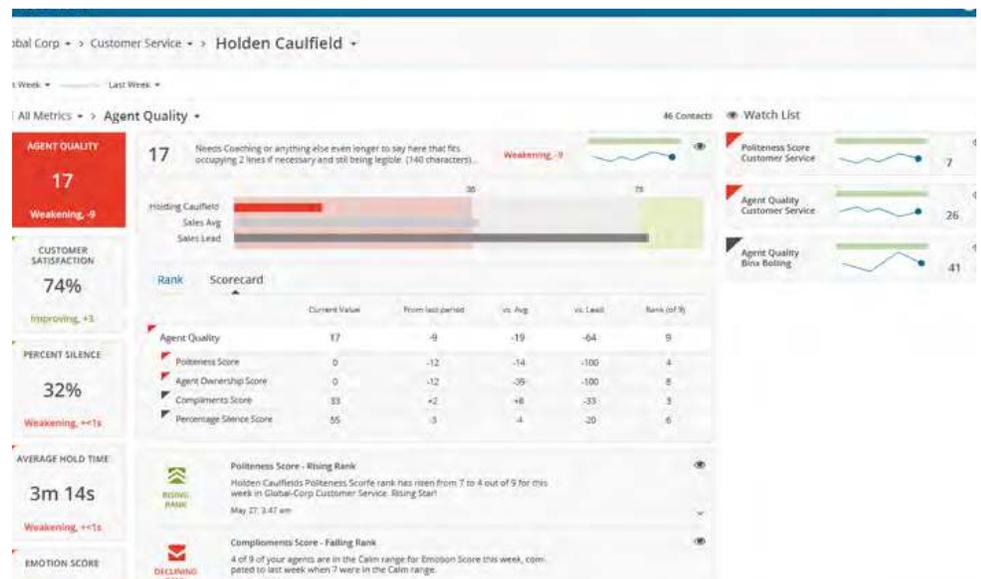
| Agent Professionalism | Customer Satisfaction | Sales Effectiveness | Agent Efficiency | Effective Compliance |
|--|--|---|---|---|
| <ul style="list-style-type: none"> • Politenes • Understandability • Empathy • Insufficient Validation | <ul style="list-style-type: none"> • Agitation % • Silence % • Stress • Competitive Mentions | <ul style="list-style-type: none"> • Introduces Offer % • Up Sell % • Cross Sell % • Overcomes Objections | <ul style="list-style-type: none"> • Over Validation • Takes Ownership • Silence % • AHT Metric | <ul style="list-style-type: none"> • Greeting # ___ (Pass/Fail) • Closing or wrap up • Risky Language • Disclosure Language |

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 and then provide agents with their own customized dashboard view of how well they are performing against the metrics as compared to other team members. These metrics can encourage healthy competition and also fuel incentive and bonus programs.

Agent Dashboard Provides Ideal Performance Feedback Loop

Before the introduction of automated speech analytics, performance feedback to agents through manual monitoring and scoring of calls was a time consuming process that required listening to calls, filling out scorecards, and finding coaching opportunities. Advanced speech analytics solves this problem by combining the principles of pervasive business intelligence and automated quality monitoring into a single solution that delivers the right information to the right person at the right time.

A performance portal provides contact center agents direct access to comprehensive and continuous feedback driven by the speech analytics platform. Agents receive the feedback they need exactly when they need it and are more confident that their performance is being measured in a holistic, objective manner. This encourages self-evaluation and improvement.



Other Insights from Automated Speech Analytics

Identify Percent Silence

When a caller is placed on hold while the agent looks something up or is routed back into an IVR queue or transferred to another agent – the customer (your customer) is not happy. Automated scorecards identify percent silence overall and 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 automatic call distributor (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.

CallMiner Eureka Speech Analytics can quickly identify where no talking occurs within a call to help determine the causes for **silence**.

The screenshot displays the CallMiner Eureka interface for a call on 02/17/17 at 8:12 AM. The agent is Alex Portnoy, and the call duration is 3m 3s. The percentage of silence is 53.3%. The interface includes a playback timeline at the top with red arrows pointing to specific silence segments. Below the timeline, the transcript is shown with various contact tags and categories. A right-hand panel lists events such as 'Identify Self - Identify Self', 'Silence (7s)', 'Silence (18s)', 'Silence (4s)', 'Silence (3s)', 'Silence (21s)', 'Silence (6s)', 'Silence (5s)', 'Branding - Brand', 'Flight Mentions - Flight Mentions', 'Branding - Brand', 'Flight Mentions - Flight Mentions', 'Branding - Brand', 'Politeness - You're welcome', and 'Silence (4s)'. The transcript includes the following text:

0s Work Assigned Jim

0s Calls Only Emotional Interactions Emotional Interactions Emotional Interactions Excessive Silence Block Excessive Silence First Call Resolution Longest Interactions Repeat Contact First Contact

1s good morning kat highlight Identify Self | Identify Self this is okay i have to help you yes ma'am i've just through wondered about something read news labor back and then in nineteen nine nine dollar travel further and i've uh got a daughter lives and of quick colorado yeah no longer in the field the wouldn't fly him to court tears ordering court is uh ordering go happily break out of what city sir at a billion

Silence (7s)

i think we take it rained ah ha just a second how to that point right uhuh

Silence (18s)

worked is our during go you hm yeah uhuh uh yes uhuh ski

Silence (4s)

yes

Silence (3s)

ah uhuh

Silence (21s)

uhuh

“CallMiner has become an invaluable tool for our marketing team to gain daily insight into the ‘why’ behind their standard performance metrics, hence facilitating the optimization process. Eureka has also become instrumental in helping us evaluate and improve call center agent performance using ‘percentage silence’ metrics along with our automated quality monitoring form.”

Andres Chuquimia

Speech Analytics Manager at Open English



Uncover Excessive Handle Times That Can Zap Customer Happiness

Average Handle Time (AHT) is another critical metric of contact center performance. 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. Slow transfer procedures, faulty IVR/ACD routings, sluggish 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 increasing costs and making customers unhappy.

“The results were transformational. Eureka analytics led to a reduction in our Average Handle Time by 60%, which enabled us to increase daily call volumes by 82%. This was an incredibly important outcome for us. By reducing the amount of time spent by agents on non-revenue generating activities, we were able to free-up more time to increase the call count and generate more revenue.”

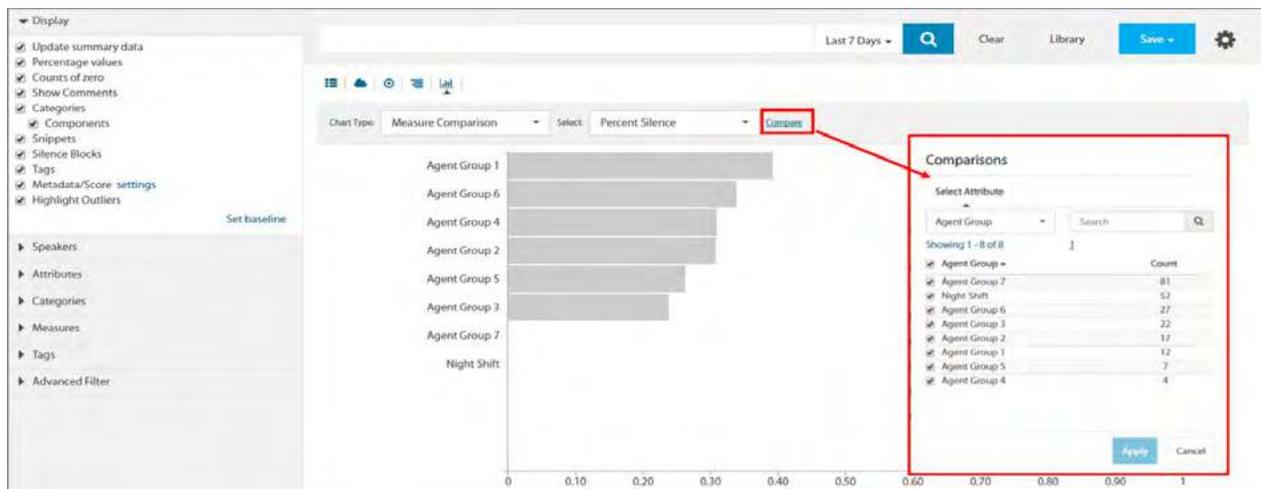
Carlos Ayala | Strategy and Analytics Analyst at Real Time Resolutions

66

Measure 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.

Easily compare by agent, team or procedure to identify outliers.



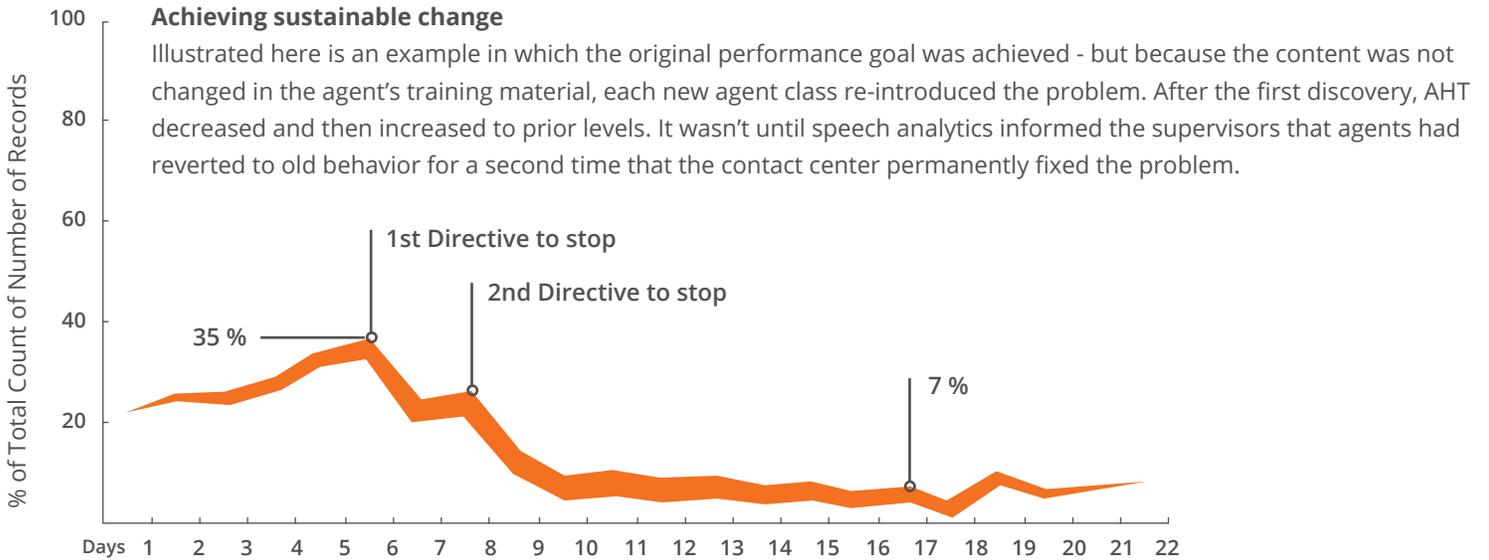
“Solving our customer’s needs quickly and in the first contact not only reduces costs but is the major contributor to our customer’s satisfaction with our contact center interaction. Our CallMiner Eureka Interaction Analytics solution analyzes 100 percent of our interactions. Utilizing pre-built and customized language categories, such as repeat contact, dissatisfaction, empathy, understandability and other behavioral language, has helped us uncover mishandled or unresolved issues. With this rich analysis data on all of our interactions, we were able to further advance our level of understanding of root cause analysis on both first call resolution successes and failures.”

Adam McCord | Quality Analytics Manager at Bluegreen Vacations

66

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, overwhelming. 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. Speech analytics' ability to bring additional speed to this rapid iteration of business process improvement helps drive the agile management practices of today's successful enterprises.



Conclusion

Speech Analytics and its ability to produce automated quality scorecards provides contact centers the complete, consumable picture they need to positively and quickly effect change in the performance of their 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 automated measurements enable call centers to go beyond the normal performance upticks associated with traditional QM coaching or training sessions to achieve an ongoing path of continuous improvement that is constantly monitored.

About CallMiner

CallMiner believes that resolution is the fundamental driver of positive customer experiences. When contact center agents and others responsible for customer engagement are empowered by insight and feedback in real-time, they can dramatically improve the rate of positive outcomes. With the tagline “Listen to Your Customers, Improve Your Business” our goal is to help companies automate the overwhelming process of extracting insight from phone calls, chats, emails and social media to dramatically improve customer service and sales, reduce the cost of service delivery, mitigate risk, and identify areas for process and product improvement. Highlighted by multiple customer achievement awards, including six Speech Technology implementation awards in the past four years, CallMiner has consistently ranked number one in customer satisfaction, including surveys conducted by DMG Consulting and Ovum. 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.



(781) 547-5690



www.callminer.com



sales@callminer.com



facebook.com/callminerinc



twitter.com/callminer



linkedin.com/company/callminer



www.engagementoptimization.com

Callminer[®]
Eureka

Listen to your customers. Improve your business.™

©2016 by CallMiner. All rights reserved.