

CalSTRS Quality Assurance Quality Monitoring Program



Who is the Quality Assurance Unit?

The Quality Assurance (QA) Unit is comprised of senior analysts with in-depth knowledge of CalSTRS programs and many years of customer service experience.

Roles and Responsibilities of QA

- Monitor, evaluate, and score Agent call responses.
- Conduct Calibration sessions.
- Partner with the Customer Service Training and Performance Management Unit.



QA Chronicles

When, Why, and How

- 2003- Measure Agent interactions with Customers.
- November 2004- Witness/Viewer System.
- February 2005- Witness/Viewer System tested.
- December 2005- System developed as quality assurance tool.
- September 2009- Intro to Verint 360 System.
- July 2010- Quality Monitoring (QM) Program Roll-out using Verint System.
- July-October 1, 2010- Ramp out time.

Witness/Viewer

- Captures 100% of audio files.
- Records and stores 100% of inbound and outbound calls from the (800) telephone line.
- Retains recorded calls indefinitely.

Verint

Verint is a two part system that captures and records both the audio and computer screens viewed during call interaction between Contact Center Agents and Customers.



CS Agent Call Response Guide



CS Agent Call Response Guide

This evaluation form is calculated using yes/no, Yes/Needs Improvement/No, and Pass/Fail evaluation schemes

	Score
1 Greeting	
1.1 Used Current CalSTRS Greeting	Yes = 5
2 Verify	
2.1 Verified Appropriate Identification	Yes = Pass No = Fail
3 Interviewing	
3.1 Asked Open and Closed Questions to Correctly Clarify Caller's Needs*	Yes = 10 NI = 5
3.2 Statement of Assurance*	Yes = 5 NI = 2
4 Customer Inquiry Assistance	
4.1 Provided Accurate Information*	Yes = 10 NI = 5
4.2 Provided Thorough Information with Appropriate Explanation*	Yes = 5 NI = 2
4.3 Used Appropriate Reference/Resources/Screen Navigation*	Yes = 5 NI = 2
4.4 Stated Action Taken*	Yes = 5 NI = 2
4.5 Used Appropriate Closing Statement	Yes = 5
5 Professionalism	
5.1 Courtesy *	Yes = 5 NI = 2
5.2 Etiquette*	Yes = 5 NI = 2
5.3 Used Appropriate Hold	Yes = 5
5.4 Used Familiar Terminology*	Yes = 5 NI = 2
5.5 Appropriate Hand-offs	Yes = 5
5.6 Managed Call Effectively*	Yes = 10 NI = 5
6 Procedures	
6.1 Documented Actions (Event Remarks)*	Yes = Pass NI = Needs Improvement No = Fail
6.2 Used Correct Transfer Process	Yes = 5
6.3 Use Appropriate LOB Codes*	Yes = 10 NI = 5

* Indicates a scaled score question

QA Analysts follow call response guidelines as set in the *CS Agent Call Response Guide* for consistent scoring.

Response categories are:

1. Greeting
2. Verify
3. Interviewing
4. Customer Inquiry Assistance
5. Professionalism
6. Procedures

Evaluation Form

Evaluation

Header

Contact: 20070912V6000171 Agent Name: Annise Adams Evaluator Name: _____

Evaluation Date: _____ Contact Date: 09/12/2007 Contact Time: 09:57:24 AM Contact Duration: 00:15:09

Greeting/Opening | Verify | Interviewing | Customer Inquiry Assistance | Customer Care | Procedures | Summary

Used Caller's Name: Select One

Professionalism: Select One

Used Appropriate Hold: Select One

Used Familiar Terminology: Select One

Took Ownership: Select One

Managed Call Effectively: Select One

Offered Additional Assistance: Select One

Used Appropriate Closing Statement: Select One

What I observed:

Total: 0

Possible: 20

Percent: 0

Evaluation Security

Save As... Cancel

Evaluations

Purpose-

- Verifies consistent and accurate information to our customers.
- For coaching and mentoring.
- Enhances training processes.
- Used for data and trend collection.
- Identifies customer needs.
- Promotes customer satisfaction.

Calibration

What is Calibration

- Calibration is the process used to measure and identify irregularities within the evaluation scoring.

Who Calibrates

- Two teams:
 - Customer Service Supervisors and Managers
 - QA Team

Calibration

cont.

Why we Calibrate

- Ensures the consistency and accuracy of evaluated calls by minimizing the differences (interpretation) in scoring.

How we Calibrate

- A single call is chosen for both teams to evaluate and score.
- Team members separately evaluate and score the call before the team meets.
- Each team compares and discusses their individual scores in order to reach a consensus on the score.
- QA Manager makes final decision.

Review Process

A process for Contact Center Agents to follow when clarification is needed on how a call was evaluated.



Review Process

cont.

- Agent and Supervisor meet to review the evaluation.
- Both parties listen to the call.
- Both parties independently score the call.
- Agent and Supervisor discuss call.
- Agent and Supervisor work together to achieve a consensus.
- If no consensus, Supervisor decides if the issue is a coaching matter or if the issue should be escalated to QA Manager.

Review Process

cont.

- If Supervisor escalates issue to QA Manager, Supervisor submits a request including the reason why Agent believes evaluation score is incorrect.
- QA Manager reviews the call.
- Results are provided to the Supervisor who follows up with Agent.
- If Agent is still unsatisfied with the decision, evaluation is escalated to Senior Leadership for a final determination.

Q-Tip Reporting

- QA complete 6 evaluations per Agent per month.
- Evaluations provided weekly to Supervisors.
- Trends from evaluations are captured and reported to Senior Leadership.
- Verint reports (evaluation data) are generated.
- Monthly "Q-Tip" generated out to Contact Center Agents.

Discussion Time

