

Checklist: Get started with QA automation

- Review your current QA scorecard and determine what you can automate. *If you don't have a QA scorecard, start by documenting what you want to measure.*
- Compare your QA scorecard categories with the out-of-the-box categories available in your conversation intelligence or QA automation platform. *For example, Tethr has thousands of pre-built categories, so you're likely to find significant overlap between what you want to track and what Tethr already measures.*
- Identify custom category needs. Document any new categories that need to be created in the platform. *If you're a Tethr user, our Customer Success and Product teams will work with you to train the machine learning model on the new categories so they can be added to your automated scorecard.*
- Integrate any custom evaluation forms for QA items that need human analysis. *Ensure you can build custom evaluations in the platform so you can run reports on data from both these evaluations and your automated QA scorecard.*
- Assign appropriate scoring weights to each QA item to make up your total QA score. *This will help finetune the machine learning model to ensure it's tracking exactly what you want it to track.*
- If you're partnering with a software provider to create custom QA categories, provide feedback on the accuracy of the category hits in transcripts. *Assign heavier weights to the categories that matter most to your customer service organization. For example, you might assign a heavier weight to "Call resolution" than "Proper greeting."*
- Create a rollout program and train your team on what to expect with QA automation. *Your rollout program may include working with your software partner to prepare QA dashboards for your end users, sharing training documentation, and hosting training sessions.*
- Start coaching agents using data from your newly automated QA program. *Give agents objective, actionable feedback to help them improve.*

Questions to ask when deciding which QA items to automate:

01

Is this requirement something the agent can control?

02

Can this requirement be measured objectively?

03

Should we include this requirement on every call, or only based on specific conditions/triggers?

04

What outcome do we want to achieve by automating this QA item?