What to automate vs. what to have people review

Questions that have an objective yes or no answer based on what the agent or customer says are great candidates for QA automation. Questions that require critical thinking, such as “Did the agent demonstrate active listening skills?”, are best left to a human evaluator.

The good news is you can automate most of the common items on a QA scorecard or checklist, giving your QA managers more time to focus on those complex items that require human input. And by combining automation with human input, you can gain deeper insights into agent performance and improve your coaching.

Check out examples of what can be automated and what should be manually reviewed below. This isn’t a definitive list but should help you think about what to automate in your own QA process.

Automated	Manual review
Call handling metrics Average handle time, silence time, transfers, lengths of holds, time to answer call.	**Agent knowledge gaps** Did the agent struggle with specific topics or place the customer on a lengthy hold to track down information? Identifying knowledge gaps can help improve agent training and knowledge base content creation.
Adherence to call script Did the agent hit all the essential parts of the call script?	**Demonstration of soft skills** Did the agent demonstrate customer service soft skills such as active listening, maintaining a positive attitude, and maintaining a calm demeanor?
Staying in compliance Did the agent comply with company policies and procedures, such as informing customers about privacy disclosures?	**Engagement and rapport with customer** Did the agent create a supportive environment for the customer and show a genuine interest in solving their problem?
Acknowledging the call reason Did the agent use an acknowledgment statement to demonstrate they understand the customer’s issue?	**Use of proper tone and pace** Did the agent speak clearly and use a friendly and professional tone?
Verification of customer’s identity Did the agent take the required steps to verify the customer’s identity? (e.g., asking for account ID, mother’s maiden name, last 4 digits of SSN, etc.)	**Problem-solving** Did the agent demonstrate problem-solving skills and efficiently resolve the customer’s issue?
Using advocacy statements Did the agent use advocacy statements to let the customer know they were addressing their issue?	**Adaptability** Was the agent able to adapt to the customer’s communication style or preferences?
Expectation setting Did the agent set clear and appropriate expectations? (e.g., “I will email you…”, “You should see the refund in 2 days”)	
Offering further assistance Did the agent ask if they could assist the customer with anything else before closing?	
Talk time Did the agent stay in the appropriate talk time range (e.g., 60-85%)?	
Case resolution Did the customer say the agent resolved their issue?	

Pro tip: Use a conversation intelligence platform that enables you to track automated QA scorecards and manual evaluations in one place. For example, Tethr lets you create custom evaluation forms in the platform and run reports on data from these evaluations and your automated QA scorecard. This gives you a complete view of agent performance and coaching needs.