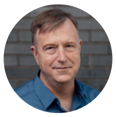
What to add to your QA scorecard for the biggest impact:



Advice from contact center veteran Don Davey

QA scorecards have traditionally been designed for manual review processes with supervisors evaluating less than 1% of an agent's interactions per month. So that an agent's performance can be compared from month to month with these small volumes, the questions in the scorecards tend to focus on things that can be observed in most interactions (e.g., the agent using the proper greeting). This unfortunately means that agent behaviors that happen less often but have big impacts on reducing operational costs, improving customer retention, and growing revenue end up getting overlooked.

Tethr's Senior Director of Customer Success, Don Davey, has seen firsthand how adding these behaviors to a QA scorecard can have a huge impact on business results. Don has over 34 years of experience as a leader in the contact center industry and has run numerous multi-site call centers in the U.S. and internationally. In his current role, he leads Tethr's Service Delivery and Customer Success teams and works closely with Tethr customers to maximize the value they get from our conversation intelligence and QA automation technology. His team's work in Tethr also contributed to the insights shared in The Jolt Effect, a sales book that provides data-driven guidance to overcome buyer indecision.

In the following, Don shares his research-backed recommendations for contact center leaders to add to their QA scorecards for the biggest business impact.

Note: *Since the behaviors below do not happen as often as other QA scorecard items, Don suggests adding points to the scorecard if the agent demonstrates the behavior in a relevant scenario or if the behavior is non-applicable. Supervisors should only detract points when the agent didn't demonstrate the behavior in a relevant scenario. This means agents aren't punished if the behavior was non-applicable to an interaction and are incentivized to demonstrate the behavior when it is applicable.*

For customer service teams

01 Used advocacy statements

Advocacy statements let customers know the agent is actively working to resolve their issue. Examples include “I can help you with that,” and “I can provide more information.” In scenarios when the customer is requesting something the agent can’t do for them, the agent can still use advocacy statements such as “What I can do is…”

Research from Tethr shows advocacy language has a bigger impact on customer satisfaction than any other agent behavior, so make it part of your QA scorecard to increase your CSAT. Advocacy language has also been shown to increase the conversion rate of sales, collections, and saves (i.e., preventing a customer from churning).

02 Set expectations for next steps

Tethr’s research shows that missed expectations are one of the most common reasons customers express dissatisfaction in service interactions. Unfortunately, many contact centers struggle with this–agents set expectations on only about 18% of calls on average.[2]

By adding this to your QA scorecard, you hold agents accountable for setting appropriate expectations about next steps–increasing customer satisfaction and reducing the likelihood of repeat contacts.

03 Offered further assistance

Agents should offer further assistance (i.e., “Is there anything else I can help you with?”) as part of their attempted closing. If they don’t let the customer bring up any other issues they have, the probability of a repeat contact goes up–which also increases operating costs for the contact center.

04 Used powerless-to-help language [negative score]

Powerless-to-help language, such as “I can’t help” or “There’s nothing I can do,” frustrates customers and damages your brand reputation. By adding powerless-to-help language to your QA scorecard as a negative category, you incentivize agents to avoid these statements. For example, depending on your scoring scale, instances of powerless-to-help phrases might be worth zero points while avoiding these phrases might be worth five points.

Note: *To help agents avoid powerless-to-help statements, train them on alternative statements that focus on what they can do. If you notice powerless-to-help statements in a high percentage of interactions across your team, it may also signal that your organization needs to update policies or processes to better enable your agents.*

[2] Tethr, “The State of the Customer Experience”

For sales teams

01 Gave a rebuttal to an objection

Data from Tethr shows conversion rates are between 75 and 260% higher when sales reps respond to a customer's objection versus when they don't. It sounds obvious that sales reps should be giving a rebuttal to an objection, but it's not as common as you might think. The research shared in *The Jolt Effect* found that agents fail to use rebuttals in 25% of conversations with objections.

To hold sales reps accountable for using approved rebuttals to objections, make it part of your QA scorecard and weight it so it has a big impact on the overall score.

Note: If you manage a collections team, you should add this category to their QA scorecard too. I've seen similar conversion rate increases when collections teams use approved rebuttals to customers' payment objections.

02 Asked for the sale

Here's another one that sounds obvious but is less common than you would think. Conversion rates are dramatically higher when reps ask for the sale than when they don't. I typically see improvements in conversion rates of 60 to 200%, but I have one Tethr client who has seen an improvement of over 300%.

It's an easy win to add "asked for the sale" to your QA scorecard and coach agents on this behavior.

Note: I've seen similar results for collections teams when they "ask for payment" and retention teams when they "ask for the save" (e.g., "What would it take to keep your business?"). Don't underestimate the power of adding this category to your QA scorecard for these teams as well!

03 Offered paperless billing

Here's a cost reduction one that's specific to interactions involving the opening of a new account in a business that has to produce monthly statements. The number of newly opened accounts on paperless billing is 70% to 100%+ higher when the agent offers to enroll the customer in paperless billing than when they don't. This is a quick update to your QA scorecard that can have a huge effect: paperless billing can save your company thousands of dollars per year on postage and handling. Those savings quickly add up across thousands or millions of customers.

You can track all the QA items that Don recommends manually, but they can also be automated–freeing up your time and letting you measure trends and improvements at scale.