



Whitepaper | November 2009

# Improving Customer Experience through Peer-based Quality Management

A look at an alternative approach to evaluating agent interactions

## Introduction

Quality management (QM) has long been leveraged to improve staff productivity, quickly resolve customer issues and enhance process flow with one end goal in mind: to improve the customer experience. In this whitepaper, we explore an alternative QM concept, peer-based quality management. This approach distributes QM evaluation responsibility to agents while opening lines of communication for the sharing of knowledge and best practices. We will also look at one organization, Elgia ([www.elgia.com](http://www.elgia.com)), whose commitment to delivering an exceptional experience led them to formulate the peer-based QM model discussed in this whitepaper.

Traditionally, the QM process involves a centralized, dedicated staff responsible for performing QM functions such as evaluating agent interactions to measure their alignment with established contact center guidelines. While this process is popular, it has its drawbacks.

A QM manager is limited in the number of customer interactions that he or she can review, especially in proportion to overall call volume. This long-established process also serves as a simple, yet rigid, top-down form of communication: a QM manager provides feedback and the agent adjusts his or her behavior accordingly. Despite its widespread use, the traditional QM process may not be the most effective solution for all contact centers.

A peer-based QM model allows contact centers to transcend conventional boundaries and benefit from an alternative methodology. This unique approach lets organizations leverage existing internal resources and expertise to improve the overall effectiveness of their QM program.

Interested in deploying a  
peer-based QM program?

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# Peer-based Quality Management

Peer-based QM is a practical way for contact centers to utilize one of their most valuable assets – existing internal resources. In this model, agents are responsible for evaluating the performance of their peers (other agents), while supervisors or QM staff perform calibration by reviewing the accuracy of the intra-agent scoring.

## The Ideal Environment for Peer-based QM

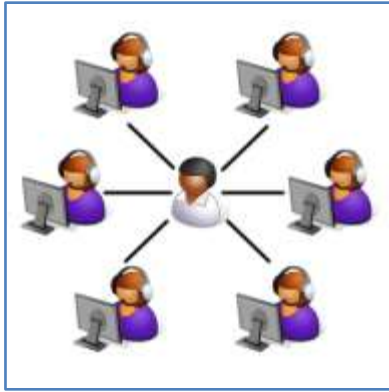
As with most business models, peer-based QM is not a one-size-fits-all solution that will work in every environment. Given the proper groundwork and fit, however, peer-based QM can be very successful. The ideal environment in which to implement a peer-based QM program is a contact center made up of a highly-skilled, educated and motivated workforce with a relatively low turnover rate. While it is not necessary for a contact center to have all of these traits, the more of them that are in place, the more effective the peer-based QM program will be.

Therefore, it is important to take into consideration the skill set, expertise, turnover rate and motivation level of a team before implementing a peer-based QM program. Relying on agents with lower skill sets in a high-turnover environment to perform QM would be futile, as often times they lack the knowledge, experience and motivation to accurately complete successful and meaningful QM evaluations. In contrast, highly-skilled and specialized agents working in a low-turnover environment will likely readily embrace and excel within a peer-based QM setting because it allows them to share their expertise and further develop themselves professionally.

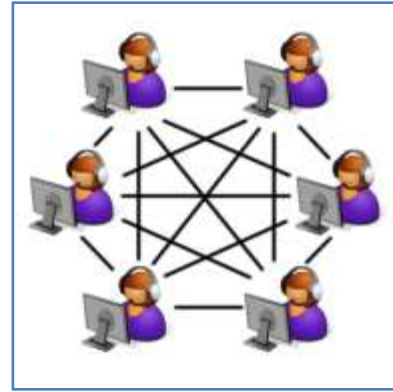
## Peer-based Evaluations

The fundamental difference between traditional and peer-based QM models lies in who owns the responsibility of evaluating customer interactions. Under a traditional model, a QM manager randomly selects contacts and evaluates them to measure adherence to a pre-defined set of standards. Peer-based QM relies on the agents themselves to perform the role of evaluator, with each agent randomly reviewing their peers' recorded interactions.

In Figures 1 and 2 below, each black line represents an agent contact that is being reviewed for QM purposes. It is easy to see the value of peer-based QM, based strictly on the number of interactions being evaluated. For example, in Figure 1, the QA supervisor performs six total evaluations (one for each agent). However, under the peer-based model in Figure 2, if each agent performs evaluations of four of the other agents, a total of 20 evaluations are performed.



*Figure 1: Traditional QM model, utilizing a centralized evaluation process.*



*Figure 2: Peer-based QM model, leveraging a distributed evaluation process.*

However, the true advantage becomes even more apparent when you consider each line as not only a contact being evaluated, but also as the ideas, knowledge and best practices that are shared between agents. As agents review each other’s customer interactions, they are able to provide critical feedback to the other members of the contact center. In doing so, each agent is exposed to peer review on a regular basis, and best practices are quickly spread to all other members of the team.

## Supervisor Calibration

Conventionally, calibration is performed by dedicated QM staff, requiring additional management overhead. Peer-based QM provides an alternative method that reduces this overhead, but still allows organizations to calibrate their scoring.

Contact center supervisors are crucial in the process as they now fulfill this calibration role. Rather than listening to and scoring individual contacts, supervisors evaluate agents on how effectively they score each other. Supervisors systematically review scoring and assess the accuracy of the intra-agent evaluations, which can be factored in to the agent’s overall performance record. This supervisor review serves as a de facto calibration process, ensuring that evaluations are consistent across all agents.

# Peer-based QM Program Benefits

The benefits of implementing a peer-based QM program are significant. While the advantages will vary, many organizations can achieve meaningful and lasting results.

## Sharing of Best Practices

Peer-based QM provides a conduit for an open exchange of ideas and best practices among contact center staff. While performing peer-based evaluations, agents are exposed to new ways of handling situations that they will or do encounter. Conversely, the agent performing the evaluation is able to share his or her experience and knowledge with the agent on whom they are performing QM. In essence, peer-based QM creates a web of information where agents share cooperative knowledge and logically apply it to their own customer interactions.

## Improved Evaluation Accuracy

Because agents regularly handle customer contacts, they often have better insight into the context and circumstances surrounding specific scenarios that they encounter while assisting customers. In a peer-based QM environment, agents are able to lend this understanding and expertise to the evaluation process. Supervisor calibration ensures that peer-based evaluations remain unbiased and in line with corporate policies, ultimately resulting in more accurate scoring.

## Maintained Efficiency

Although there is an additional time commitment required for agents to perform peer-based evaluations, their overall efficiency will be maintained under a peer-based QM model. By leveraging contact recordings, agents are able to perform and review QM evaluations during periods of low call volume. Thus, the peer-based QM program will not interfere with agent performance or result in missed calls or longer hold times.

## Lower Resource Requirements

A peer-based QM model eliminates the need for a dedicated QM staff to review contacts, making it ideal for smaller environments with limited resources. But peer-based QM isn't just for small organizations – it also benefits larger contact centers by freeing up existing QM staff so that they can focus on more strategic initiatives. In addition, the resources required to increase the overall number of agent evaluations are minor. For example, when looking at the example in Figure 2 above, if each agent evaluates five other agents rather than four, the total number of evaluations increases from 20 to 30. This is a 50 percent increase overall, with only a minor increase in agent workload.

## Higher Customer Satisfaction

While QM accuracy, agent efficiency, knowledge sharing and cost-savings are important, the real end result of peer-based QM is higher customer satisfaction. Each of these factors contributes to an improved QM process and a more efficient workflow, ultimately resulting in a better customer experience.

## Elgia Case Study

*How one company leveraged CallCopy to re-invent its QM program and drive a superior customer experience.*

Elgia, a leading business process outsourcing (BPO) company specializing exclusively in enhancing customer engagement, understands that serving people, as well as the products and services they use, is essential to delivering an exceptional customer experience. When they wanted to invest in enhanced phone and technology architecture, they turned to CallCopy.



<http://www.elgia.com>

Utilizing CallCopy's cc: Discover solution suite, Elgia was able to devise the innovative model referred to as peer-based QM in this whitepaper. The capabilities included in cc: Discover's standard licensing provide Elgia with several unique features that enabled the company to create this model:

- QM functionality is included with all contact recording licenses.
- Unlimited playback and QM reviewer licenses are included for all staff.
- QM is fully integrated with contact recording, allowing agents to perform peer evaluations during down time.

### How CallCopy Enabled Elgia to Formulate the Peer-based QM Model

Historically, Elgia ensured the quality of its service by having managers listen in on live phone calls as they were received. However, the peaks and valleys of incoming call patterns often resulted in long, inefficient periods of downtime while waiting for a given agent to receive a call. In addition, the process was limited by the number of calls that managers were able to review. With its integrated QM capabilities, CallCopy provides Elgia with a few important capabilities that it did not previously have.

#### QM included with every installation

CallCopy's integrated QM module, included with every recording installation, allows Elgia's agents to seamlessly transition from answering calls to carrying out QM. Because the QM interface is displayed alongside the recording, agents are able to easily perform QM in a single application as opposed to toggling and accessing several different applications.

*"We've found that agents are very good at performing quality management, because of the insight they gain from answering calls all day. They are in the trenches, so they have real-world experience on how to handle individual situations that someone else may not."*

**- Stacey Scott,**  
CEO, Elgia

## Unlimited playback & reviewer licenses

CallCopy's unique feature set allows Elgia to capitalize on their investment by providing the key functionality used as the basis for the peer-based QM program. Unlimited playback and QM licenses provide all agents (not just supervisors) with the ability to playback recordings, allowing agents to take on a QM evaluator role.

Elgia utilized this ability to establish a peer-based QM model, whereby agents are responsible for evaluating each other's calls. This not only allows them to exponentially increase the number of calls being reviewed, but it also allows knowledge and best practices to be quickly shared between team members on a daily basis.

## Integrated QM

Having QM functionality fully integrated with cc: Discover's contact recordings allows Elgia's agents to perform peer evaluation on demand, eliminating the need to wait for incoming calls to be received, and leading to greater operational efficiency and less down time for agents. It also allows agents to perform QM on a time-frame that makes sense for the organization, such as during periods of low call volume.

The overall results of this undertaking are both significant and impressive. The peer-based QM model has allowed Elgia to take a customized approach to quality management while building an inventive and efficient program. With the aid of CallCopy's flexible, adaptable QM software, Elgia was able to break free of traditional and limiting QM processes and create an effective QM model well suited to their unique needs.



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Through its commitment to the highest standards of customer and employee satisfaction, CallCopy has established itself as a leading provider of innovative performance management solutions. The highly scalable, award winning cc: Discover suite delivers advanced call recording, screen capture, quality monitoring, speech analytics, customer satisfaction survey and workforce management capabilities to contact centers, trading desks, financial institutions and healthcare providers worldwide.

CallCopy empowers organizations to gather business intelligence, which is leveraged to maximize performance through improved employee retention, compliance with government regulations and a more customer-centric environment.

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