



# VEREQUEST

Helping companies keep the promises they make®

## Introduction to Outsourced Contact Center Quality Monitoring

# It's a **CUSTOMER-CENTRIC** world

The way customers make purchase decisions and determine loyalty has changed for good.

Customers have new expectations.



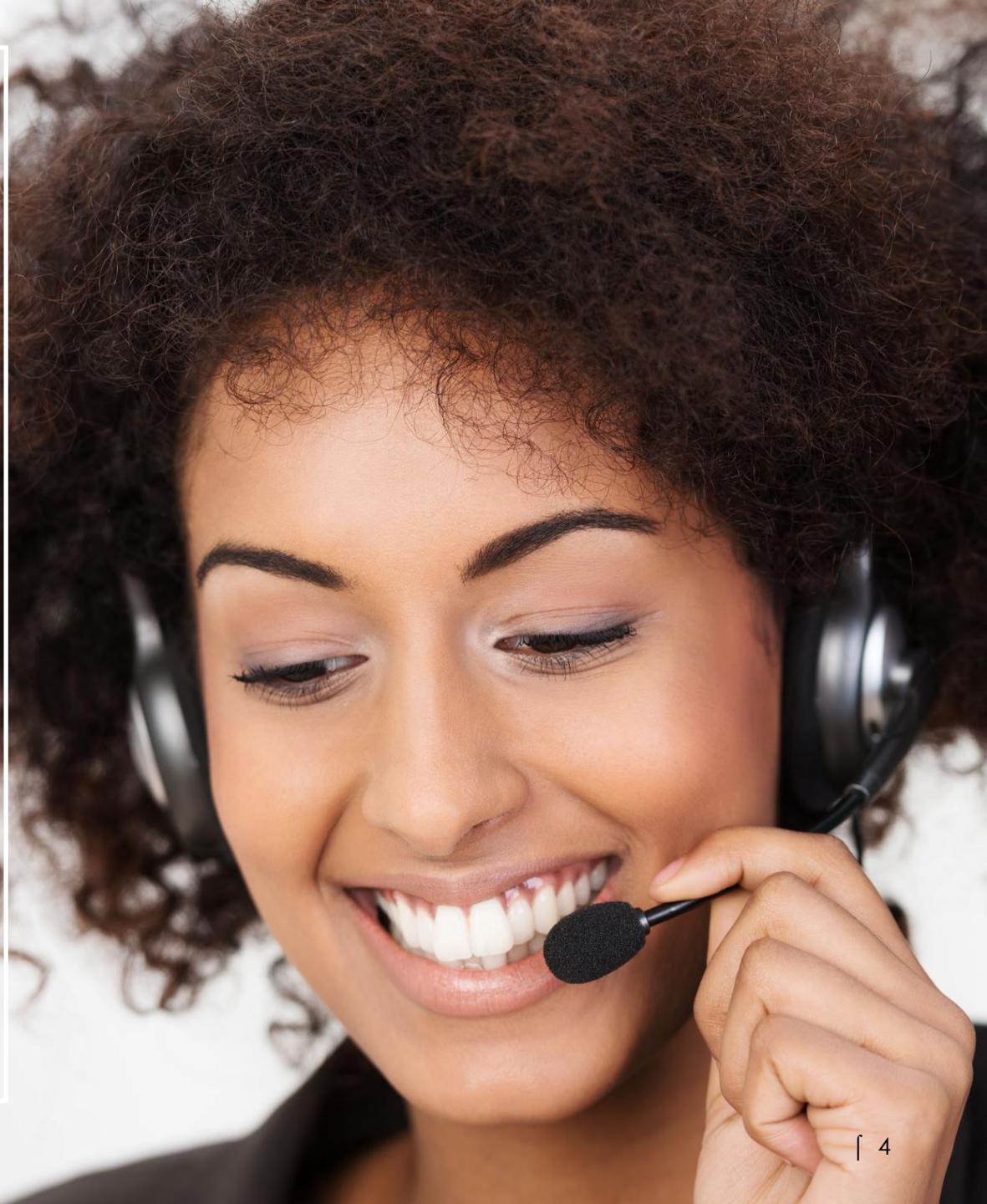


What  
**DIFFERENTIATES**  
companies is no  
longer  
a matter of  
**PRODUCT**  
or **PRICE** but ...

the **QUALITY** of the  
**EXPERIENCE.**

**56%**

of consumers say  
they have higher  
expectations for  
**CUSTOMER  
SERVICE** now  
than they had  
just one year  
ago.



**76%**  
of consumers say they  
view customer service  
as the true test of how  
much a company  
values them.



**DIGITAL**  
interactions will  
surpass voice in  
the **CONTACT**  
**CENTER** by 2020



How prepared are your agents?



**85%**  
of customer  
relationships will  
be self-managed  
by 2020...

... leaving all the  
**emotion-laden,  
problem-solving  
issues** to  
**HUMAN** agents

How prepared are your agents?

Maybe it's time to  
do things a little  
**DIFFERENTLY?**

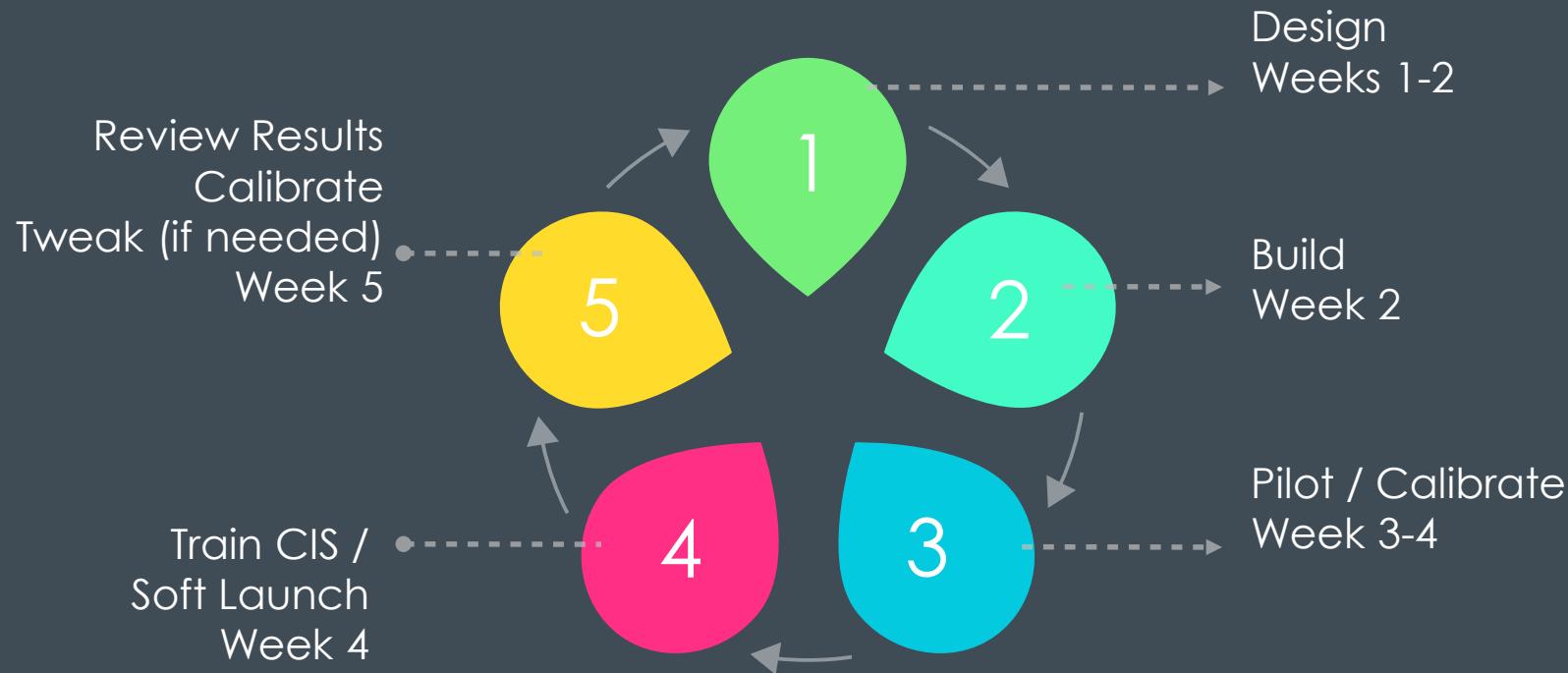
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**FOCUS** internal  
resources on things that  
will make a meaningful  
difference for:

- customers
- the company
- the center
- the employees



# 4-5 Weeks to Launch - Timeline



# Design a Branded Customer-Centric Experience Workshop (1-day)

- ▶ How does your brand translate in the contact center environment?
- ▶ What behavior drives the greatest loyalty / repeat purchase / referrals? What behavior drives the strongest sales conversion?
- ▶ How can your agents best deliver on your 'brand promise'? How can you differentiate your company in the marketplace via service?

#	%	Standard	Shortfalls	Description	Sounds Like (SL) and/or Best Practice (BP)
10	10%	You treated me with genuine care + concern	GENUINE	<p><b>On Standard</b></p> <ul style="list-style-type: none"> <li>I felt I was having a dialogue with a real person who genuinely cared about me and my needs.</li> </ul> <p>No timely empathy/ignored emotional clues.</p> <ul style="list-style-type: none"> <li>I had an obvious emotional response (positive or negative) but the Specialist did not empathize or reflect back any of the emotional content of my situation.</li> <li>I expressed an emotion and/or "clue" and the Specialist did not acknowledge it and/or did not leverage this information to build rapport.</li> </ul> <p>Did not appear genuine</p> <ul style="list-style-type: none"> <li>The Specialist didn't sound authentic. He/she sounded fake and/or insincere.</li> <li>I didn't feel that my personal interests were driving the conversation.</li> </ul> <p>Specialist sounded scripted</p> <ul style="list-style-type: none"> <li>The Specialist was telling me about a product/service and it sounded like they were reading it from the brochure.</li> <li>NOTE: OK if reading compliance info and informing caller in advance.</li> </ul> <p>Didn't apologize for error or complaint</p> <ul style="list-style-type: none"> <li>Regardless of who made the error or mistake, the Specialist did not offer an apology.</li> </ul>	<ul style="list-style-type: none"> <li>BP: <i>"I understand this is frustrating for you."</i></li> <li>BP: <i>"Congratulations on your new house."</i></li> <li>BP: <i>"I can hear that you're upset. Let me do what I can to help you with this."</i></li> <li>BP: <i>"A trip to Europe? You must be very excited."</i></li> <li>BP: <i>"I'm so sorry to hear that". "That must have been difficult for you."</i></li> <li>BP: <i>"How frustrating for you!"</i></li> <li>BP: <i>"That's exciting!" "What does that mean for your position?"</i></li> </ul> <ul style="list-style-type: none"> <li>BP: <i>"Let me read this to you just to be sure it is accurate..."</i></li> <li>BP: <i>"I need to read you some standard legal information right now... OK?"</i></li> </ul> <ul style="list-style-type: none"> <li>BP: <i>"I apologize for that. What can I do now to help you?"</i></li> <li>BP: <i>"I am so sorry to hear that. Let me see what I can do to help you."</i></li> </ul>

# Create a Unique, Secure QA Web Portal

- ▶ All VQ Sites are hosted in Canada in SOC Type II facilities; fully PCI compliant
- ▶ Consolidated view of quality across all contact center channels

The screenshot shows the VereQuest QA Web Portal homepage. At the top, there is a header bar with a lock icon labeled "Secure" and the URL "https://yourcompany.verequest.com". The header also features the VereQuest logo and navigation links for Home, Audits, Reports, Manage, and Set-up. Below the header, a message indicates "Currently logged in to: Consumer HelpLine". A "Tools" section contains three icons: a pie chart for "Reports", a wrench for "Manage", and a gear for "Set-up Audits". A "Search / Create Audits" section contains four icons: a red telephone handset for "Call Audit", an envelope for "Email Audit", a speech bubble and user icon for "Web Chat Audit", and a shopping cart for "Mystery Shop". At the bottom of the page, a copyright notice reads "Copyright © 2018 VereQuest Inc."

# Setup and Customize Your Site

- ▶ All customization is table-driven making it very straightforward to setup and easy to update in real-time
- ▶ Standards are weighted and allow for N/A and Auto-Fail

## Manage Standards

**15 Standards** (Not Including Inactive)

Show only the ACTIVE Records

ORDER	EDIT	DEL	NAME	POINTS	ABBREVIATION	SET UP DATE	ACTIONS
1			First time contacting the company re this issue	0	PREV	2010-03-08 10:11:31	<a href="#">Shortfalls</a>
2			No mention/evidence caller was transferred in	0	TXFRS	2010-03-08 10:11:31	<a href="#">Shortfalls</a>
3			Callers demeanor at START was pleasant	0	START	2016-10-21 13:34:26	<a href="#">Shortfalls</a>
4			Greeted in a positive manner	15	GREET	2015-11-04 06:25:29	<a href="#">Shortfalls</a>
5			Demonstrated active listening	5	LISTEN	2017-11-01 10:25:14	<a href="#">Shortfalls</a>
6			Took ownership	10	OWNER	2010-03-08 10:11:31	<a href="#">Shortfalls</a>
7			Demonstrated genuine care/concern				
8			Managed holds & dead air well				
9			Was courteous & professional				
10			Spoke in a clear and confident manner				
11			Asked questions to better understand caller needs				
20			Recapped action items				
22			Left caller feeling valued				
23			Callers demeanor at END was pleased/satisfied				
24			Predominant agent demeanor throughout the call				

## Manage Shortfalls

**7 Shortfalls** (Not Including Inactive)

Show only the ACTIVE Records

ORDER	EDIT	DEL	ID	NAME	SET UP DATE
0			72	On Standard	2010-03-08 10:22:43
0			73	Didn't provide clear explanation re: how/why	2010-03-08 10:22:43
0			77	Didn't manage the transfer or referral	2010-03-08 10:22:43
0			79	Placed blame on others	2010-03-08 10:22:43
0			80	Pushed issue back on me/deferred responsibility	2010-03-08 10:22:43
0			1207	Didn't follow-through on all my requests	2014-10-22 08:04:26
60			1299	Didn't immediately reassure caller with 'Can do'	2017-11-10 11:16:13

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## 3

# Evaluate the Call, Email or Live Chat Interaction

VQ Call ID 2224 - Audit

Team	Customer Relations	Type	Escalation	Caller	109871234756161
Agent	Steve Comriedonia	Category 1	Consumer	Date / Time	01/02/2017 10:09:32
Target Language		Category 2	Incident / Helpdesk	Target ATT (sec)	
Agent ID 1	stevecom1	Category 3	Not applicable	Actual ATT	426
Agent ID 2	12344	Category 4	Not applicable	Audit Language	English

Standard	Pts	N/A	On	Primary Shortfall	Notes
First time contacting the company re this issue	0	<input type="checkbox"/>	<input type="checkbox"/>	Called company re this issue once before	I'm at the pharmacy trying to get my husband's prescription filled and they are telling me I have to pay because this is for a brand name and not a generic. My husband can't take the generic, it doesn't work on him, and so this is the medication he needs. We've met our \$6000 deductible. I've never had this problem before.
Callers demeanor at START was pleasant	0	<input type="checkbox"/>	<input type="checkbox"/>	Caller was upset, frustrated at START	Peter says it will take a minute for the records to come up. Peter asks me several times for another moment, letting me know that it takes some time for all the information to populate. He asks me to hold. Sure. It's a very long wait. He thanks me for holding and informs me that, because the
Greeted in a positive manner	15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Standard	is a generic available, I am obliged to pay the difference in cost between the generic and the name brand. Oh I see! That's why the almost \$175 for this? Yes.
Demonstrated active listening	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Standard	Peter suggests the information on why he approves paying
Took ownership	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Standard	
Demonstrated genuine care/concern	15	<input type="checkbox"/>	<input type="checkbox"/>	Didn't express empathy (when appropriate)	
Managed holds & dead air well	5	<input type="checkbox"/>	<input type="checkbox"/>	Didn't follow hold expectations	
Professional	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	*On Standard	
Positive manner	15	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Standard	
Understand caller needs	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>	On Standard	
Left caller feeling valued	5	<input checked="" type="checkbox"/>		Not Applicable	
	100	95	75	78.9%	

\*For 60 days only per security protocol

Details of the interaction for reporting purposes

A copy of the audio file/email is attached\*

Summary of the interaction for content

Behavioral Score  
(75 out of 95)  
= 78.9%

# 3

## Monitor the Customer's Experience

- ▶ An added-value qualitative evaluation helps to bring the customer into the coaching discussion and balances 'compliance' requirements
- ▶ Provides insight into the experience for all types of interactions (not just for those with whom you have a relationship and can survey)

### VQ Call ID 2224 - CE Survey

*Please take a few minutes to gather your thoughts and, from the customer's point-of-view, indicate whether or not you agree with the following statements.*

- |   |            |
|---|------------|
| 1) The issue I called about was resolved to my satisfaction.  | Neutral ▾  |
| 2) I found this experience to be 'effortless'.  | Disagree ▾ |
| 3) I felt that this agent had the knowledge, expertise and tools needed to serve me well.                     | Agree ▾    |
| 4) I developed a sense of rapport with this agent.  | Neutral ▾  |
| 5) I would like this agent to serve me again in the future.   | Agree ▾    |
| 6) Based on this experience, I would speak positively about ABC Company to my colleagues, friends and family. | Agree ▾    |

33%

Customer  
Experience  
indicator

- ▶ 6 questions about the customer 's experience:
  - ▶ from the customer's perspective
  - ▶ completed by VQ's Customer Insight Specialists
  - ▶ calibrated against Company customer survey results

## 3

# Monitor the Customer's Experience

- ▶ We typically monitor only what it is we are asking agents to do (standards) without balancing this with the experience customers are having.
- ▶ By capturing a customer experience indicator, we are able to support a more balanced approach to measuring success and quality. This offers a host of benefits as it relates to analytics.



## 3

# Provide Feedback and Coaching

- ▶ Coaching notes help to focus coaching effort on where sustaining / improving agent behavior will have the greatest impact.
- ▶ Coaching can be forwarded directly to agents and/or leveraged by frontline supervisors for their own coaching sessions.

***Did Well:***

Because Peter offered an option to have the caller's husband considered for an exception to cover the full cost of the medication he needed, the caller felt guided and clear on what next steps to take. By ensuring that she offered a clear 'can do' statement when the caller made specific requests, Peter verbalized his intent to take ownership which provided the caller with the peace of mind she was looking for.

***Opportunities for Improvement:***

Peter's tone was transactional throughout the call. Had he empathized at the start upon hearing the caller's surprise and worry that her husband's needed medication was not being covered (e.g. "I can certainly appreciate why you'd be concerned. Let me pull up your account to start so we can figure out what exactly is going on"), it would have reflected his understanding of the sense of urgency of the situation. Given the caller's clues that her husband's need for this medication was urgent, the vague time frame offered on processing a doctor's request for consideration undermined the projection of confidence and credibility. If indeed it might take up to two weeks, it would have been better for Peter to make this clear so the caller could prepare for this added expense.

***Other Comments:***

[Do we have the correct pr

High priority action  
(escalations,  
kudos) are sent on  
a priority basis

Indicator for team  
leaders/coaches  
to flag interactions  
when agents are  
coached

Escalation  
Escalation : ( ▾ )

Coached

PDF

Hold

Back

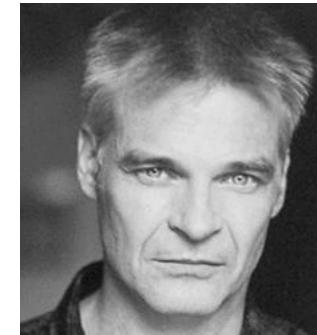
End

# VereQuest Customer Insight Specialists

- ▶ VereQuest Customer Insight Specialists (CIS) are specially trained to listen from the customer's perspective and offer an unbiased perspective on the interaction.

They:

- ▶ have listened to literally thousands of customer interactions
- ▶ are experienced coaches
- ▶ are predominantly working actors / performers – which contributes to their ability to put themselves into the 'customer space' and interpret how the customer may be feeling
- ▶ go through in-depth criminal background checks and annual security audits
- ▶ have an average tenure with VereQuest of > 6 years



## 5

# Monitor, Report, Analyze, Discover

**Generate Reports**



Agents



Teams



Groups



Programs



Business

**Program Reports**



Call Audit



Email Audit



Mystery Shop



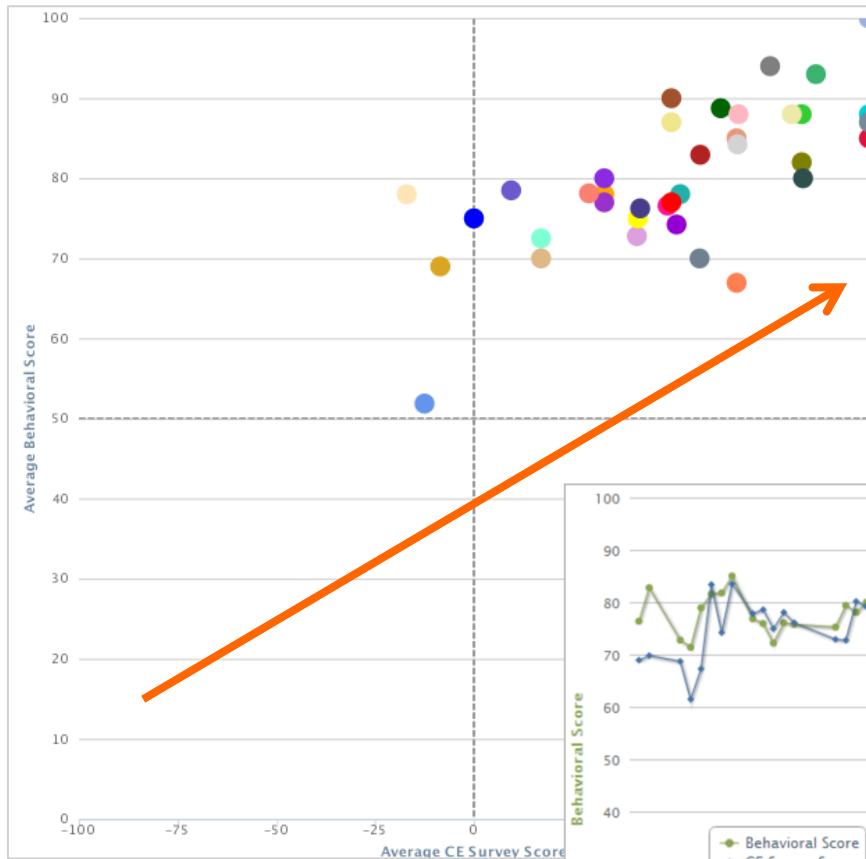
Web Chat Audit

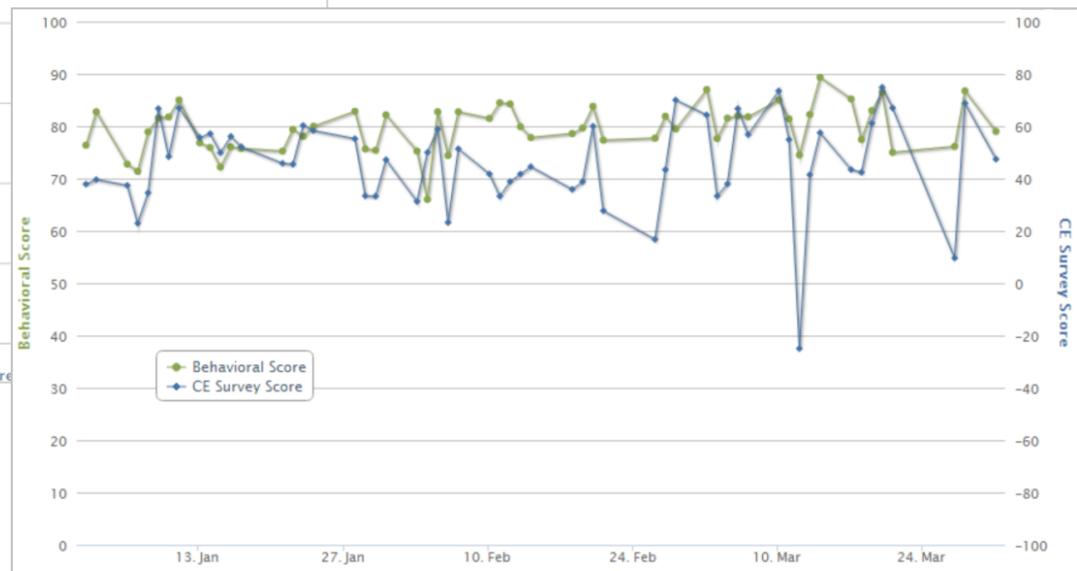
<div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Performance Trend</b> Average Behavioral Score &amp; Customer Experience Score over time</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Performance Trend</b> Average scores over time (incl. Counts and Auto Fail)</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Performance Scatter Chart</b> Avg Behavioral Score vs Avg CE Score</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Individual Agent Results</b> Average Behavioral Score &amp; Response Score</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards Trend</b> % Off Standard (for all standards)</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards (with Drill-Down)</b> % Off Standard (with Drill-down for Shortfalls)</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards</b> % Results</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards</b> % and # Results</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Individual Agent Results by Standard</b> % Results</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards (Comparative)</b> % Results over time</p> </div> <div style="border-bottom: 1px solid #ccc; padding-bottom: 10px;"> <p><b>Standards (Comparative)</b> % Results over time</p> </div>	<p><b>Shortfalls (for weighted standards)</b> Rank-ordered by # of incidences/% of Audits</p> <p><b>Shortfalls (0% weighted only)</b> Rank-ordered by # of incidences/% of Audits</p> <p><b>Customer Experience Survey</b> Results by question</p> <p><b>Customer Experience Survey</b> Results by question</p> <p><b>Individual Agent Results by CE Question</b> % Results</p> <p><b>Behavioral Score Distribution</b> # of audits by Behavioral Score</p> <p><b>Customer Experience Survey Score Distribution</b> # of audits by CE Survey Score</p> <p><b>Consolidated Results Across Channels</b> Average scores for Calls, Emails, Web Chat &amp; Mystery Shopping over time (incl. Counts)</p> <p><b>Agent Trends Table</b> Agent Scores by count</p> <p><b>CIS Results Analysis</b> Average Scores Over Time</p> <p><b>CIS Trend Analysis</b> % Off Standard (For All Weighted Standards)</p>
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## 5

## Monitor, Report, Analyze, Discover



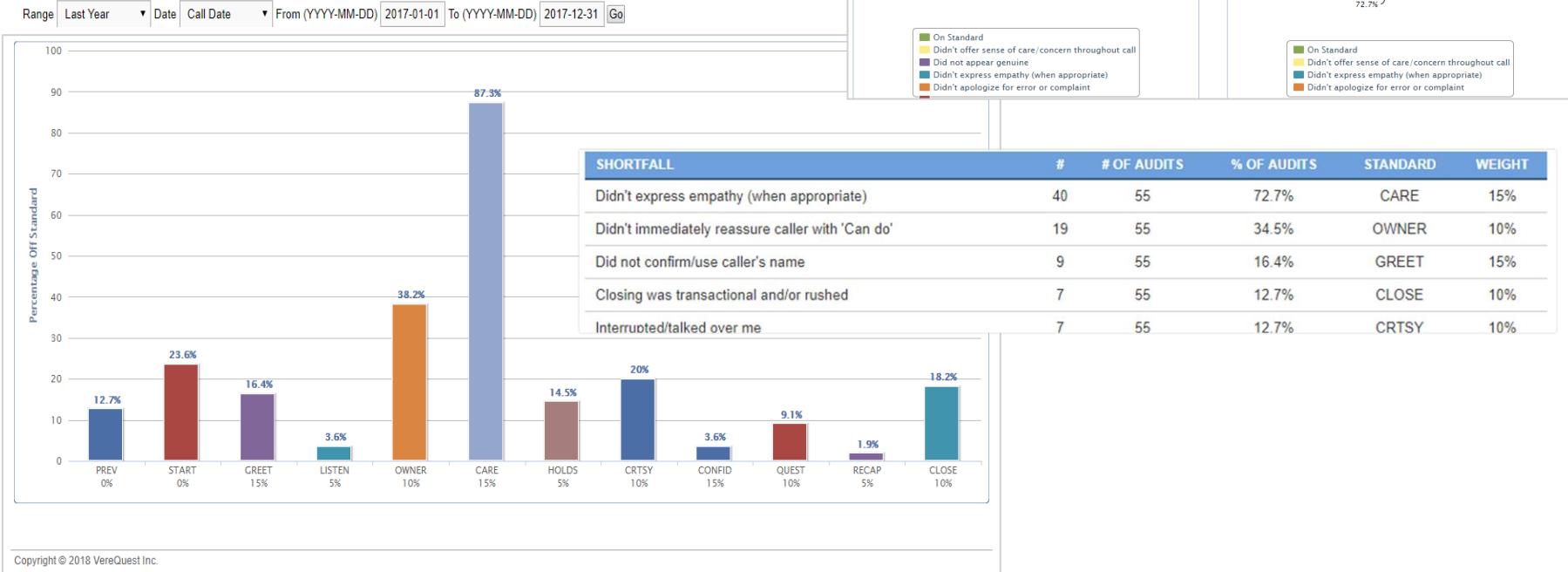
- ▶ Rank agent performance by Behavior and Customer Experience
- ▶ Follow trends over time



## 5

# Monitor, Report, Analyze, Discover

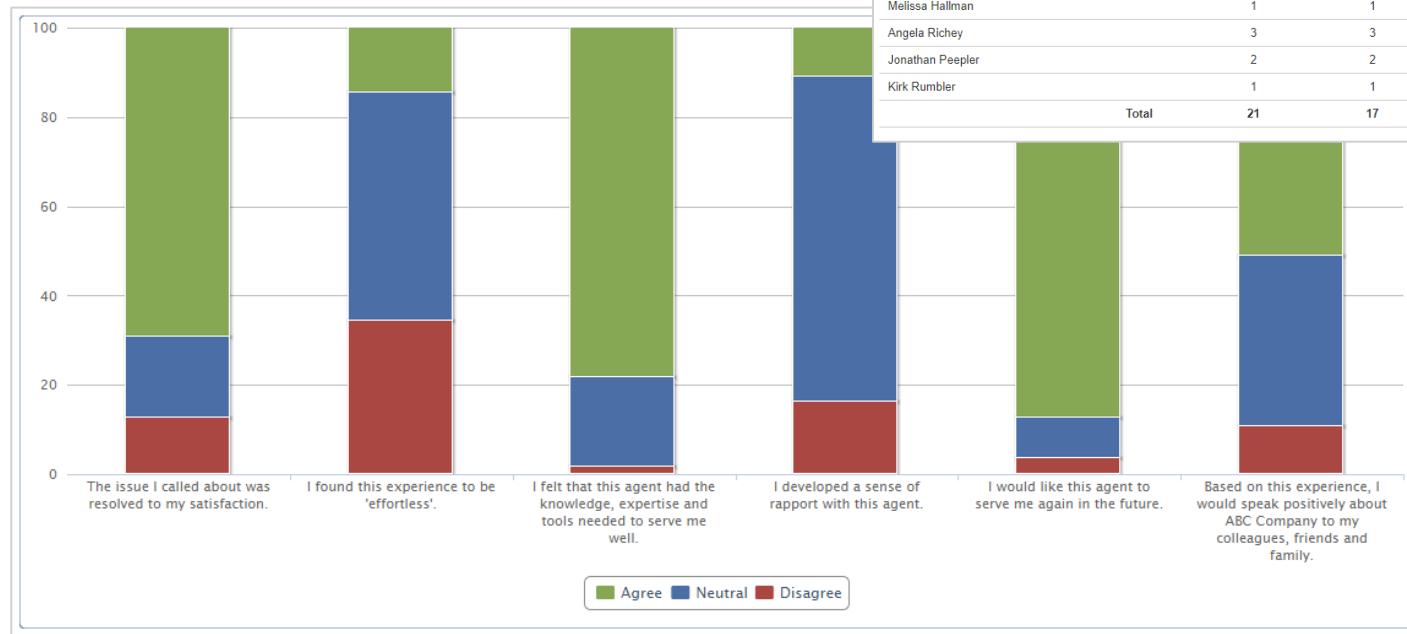
- ▶ Identify key areas for improvement for team training or individual coaching.
- ▶ Compare results over a period of time.
- ▶ And more!



## 5

# Monitor, Report, Analyze, Discover

- Dig deeper into what makes a great customer experience and uncover best-in-class customer experiences within your contact center.

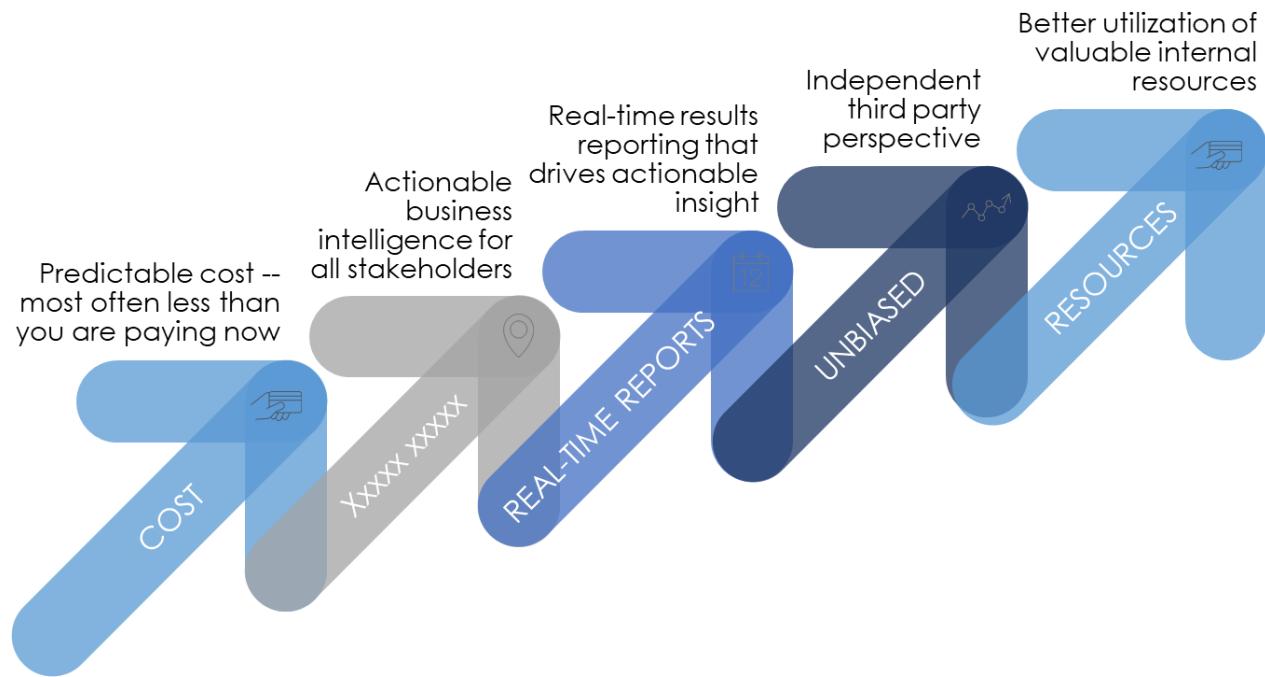


AGENT	# OF AUDITS	AGREE		NEUTRAL		DISAGREE	
		#	%	#	%	#	%
Steve Comriedonia	1	1	100.0%	0	0.0%	0	0.0%
Jenny Boulton	3	3	100.0%	0	0.0%	0	0.0%
Angela Kozlowski	2	1	50.0%	1	50.0%	0	0.0%
Peter McDonnell	1	0	0.0%	1	100.0%	0	0.0%
Miranda	1	1	100.0%	0	0.0%	0	0.0%
Sharon Jones	2	2	100.0%	0	0.0%	0	0.0%
Shelley McGean	1	0	0.0%	1	100.0%	0	0.0%
Idil Hansen	2	1	50.0%	1	50.0%	0	0.0%
Peter Genesio	1	1	100.0%	0	0.0%	0	0.0%
Melissa Hallman	1	1	100.0%	0	0.0%	0	0.0%
Angela Richey	3	3	100.0%	0	0.0%	0	0.0%
Jonathan Peeler	2	2	100.0%	0	0.0%	0	0.0%
Kirk Rumbler	1	1	100.0%	0	0.0%	0	0.0%
Total	21	17	81.0%	4	19.0%	0	0.0%



# VereQuest Outsourced Quality Monitoring

- We take the effort out of ongoing contact center quality monitoring.
- Results are available in a timely manner so you can begin continuous improvement.
- We identify opportunities for coaching and provide you with coaching tips.
- You now have the time and resources to focus on coaching.

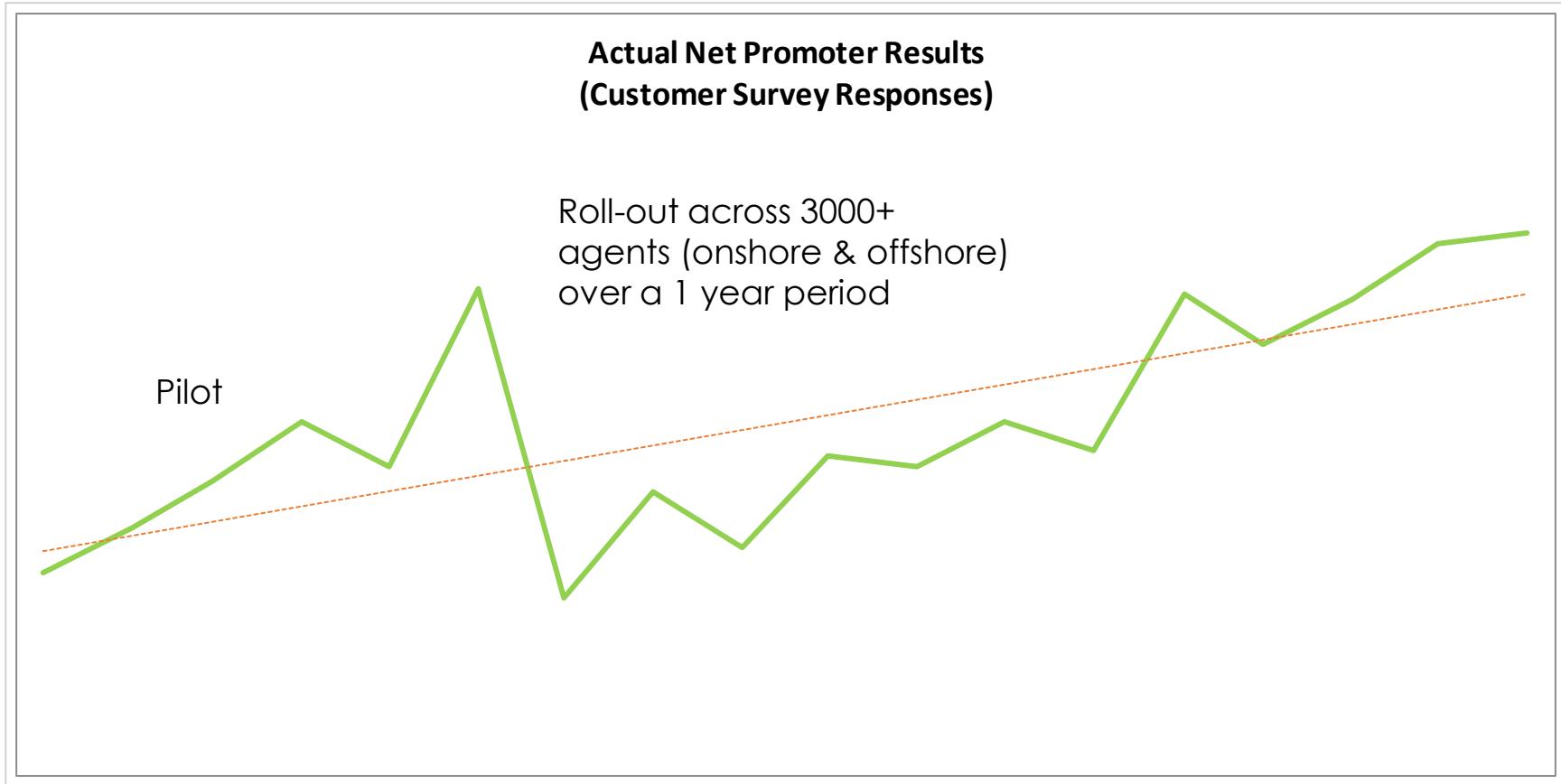


AND MORE!

- Keep your best agents on the phone serving customers
- Access Quality Monitoring expertise and best practices
- Consolidate all QM efforts across all channels and centers
- Capture valuable data needed to spot opportunities for improved customer experience, operational efficiencies, etc.
- Real-time measurement of the customer experience ... most valuable when you can't survey customers/prospects directly
- QM continuity during periods of high volume and/or contact center disruption
- And, of course, improved agent performance (Sales, Churn, NPS, etc.)

# What can you **EXPECT?**

- ▶ Most clients see meaningful improvement in as little as 6 weeks with continuous improvement ongoing.
- ▶ Sustaining high performance is always the challenge which is why more coaching time is key.





“

If you ask our SVP of Shared Services they will say without hesitation that, while there are a lot of factors that contribute to our customer experience results, we could not have achieved this success without our VereQuest partners. It is a real collaboration.

”

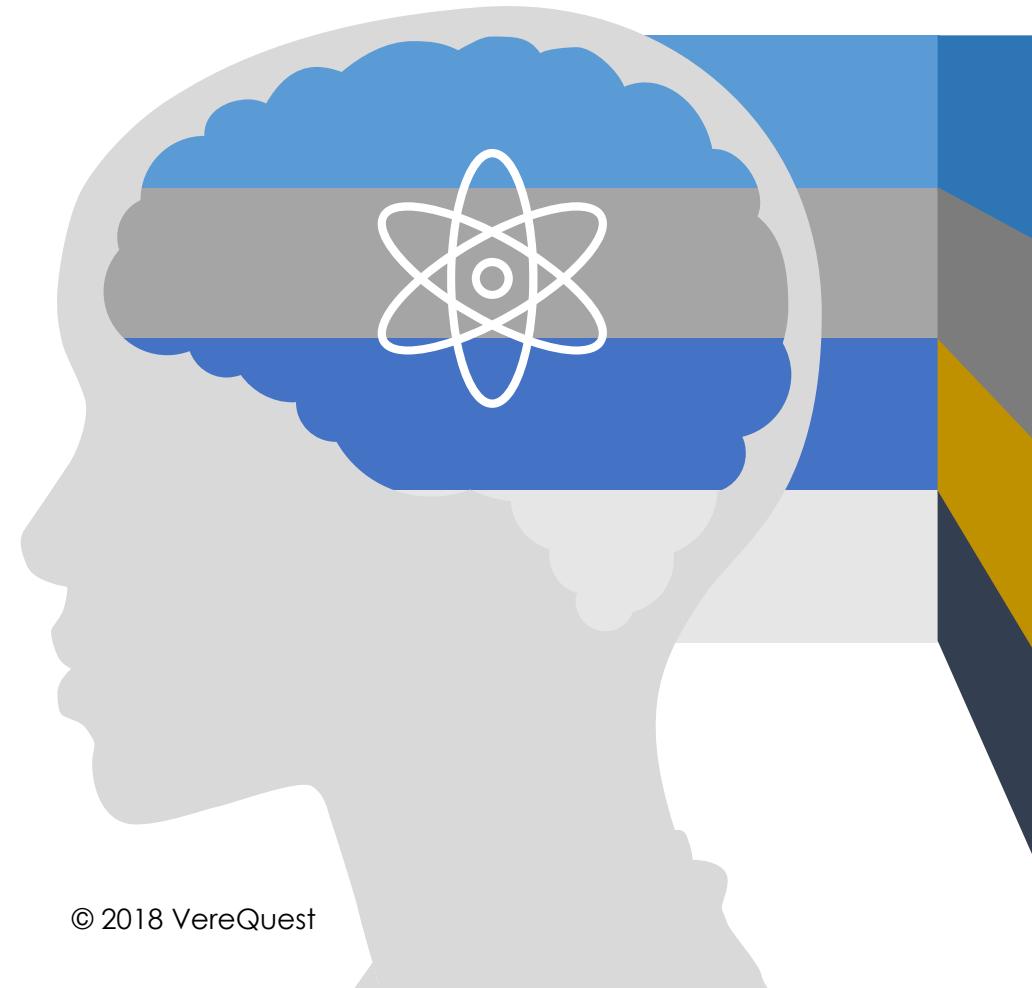
# Lots of options to align with your business needs

It doesn't have to be an all or nothing arrangement. We're known for our flexibility!



# Extend the research of your QA efforts

By design, our unique licensing arrangement allows you to extend the learning from QA well beyond the contact center. To help others understand the reality of the customer experience better.



**01**

## BUSINESS

What's happening on the front line?  
Where can we reduce waste in time/effort  
while still improve loyalty?

**02**

## MARKETING

How are customers experiencing the brand?  
Our products/services?  
What are the barriers to advertising  
effectiveness?

**03**

## TRAINING

How successful is our training? Are agents  
applying what they have learned?  
Where are the priorities for future training?

**04**

## OPERATIONS

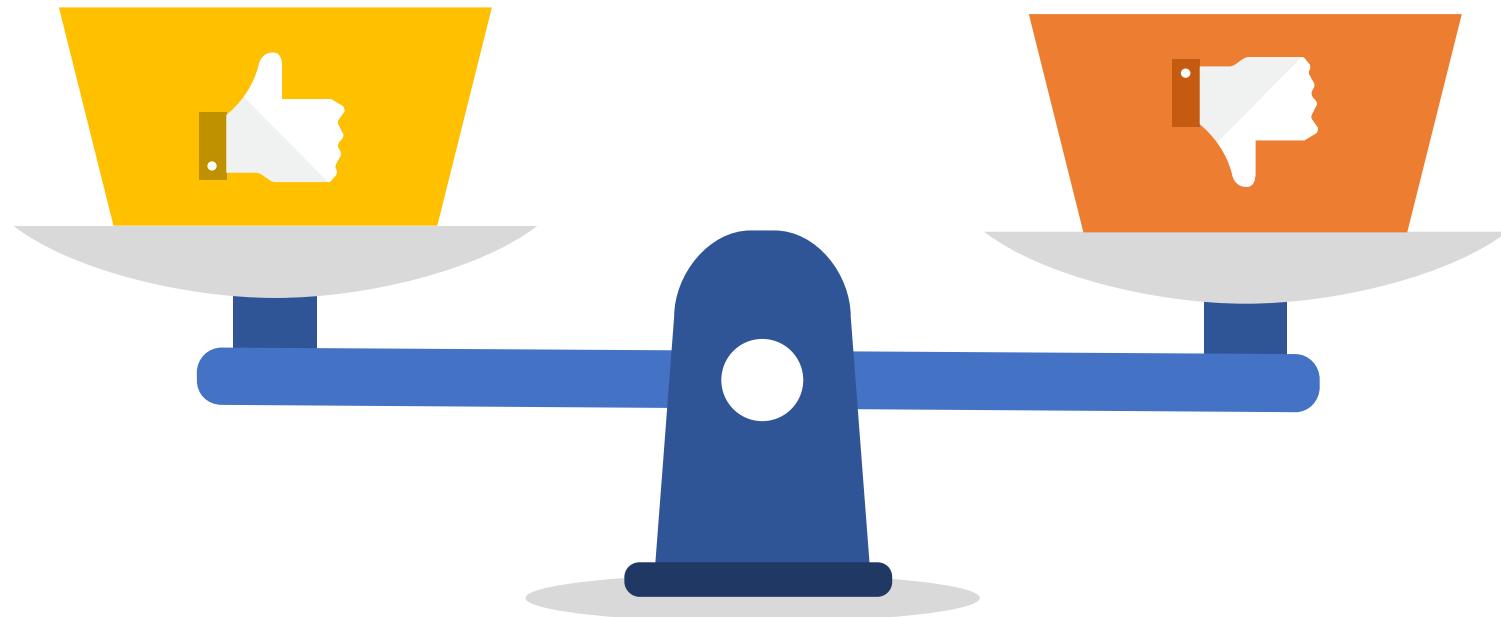
Where is the effort in the experience?  
What is the root cause behind errors, delays,  
etc.?



# Have we convinced you yet?

## PROS

VereQuest will help you achieve your targets by supporting your contact center and operations team with coaching and insight to improve the overall customer experience.



## CONS

You and your teams won't need to spend your valuable time listening to hundreds of calls/emails/chat sessions to identify a few coaching and continuous improvement opportunities. So sad.



# Things to do before we get started

VereQuest pricing is all based on ‘time to complete’.

We will ask to evaluate a sample of the calls/emails/chats taking into consideration the following:

Element	Example (Mins.)
Time to Access Record (Batch, VPN, Direct)	1
Length of the Call (ATT)	5
Time to Read Email/Chat (Single or End-to-End)	
Time to Complete Evaluation (Based on complexity of criteria)	2
Time to Craft Coaching (Based on complexity of the business)	5
Total Audit Time	13

- Determine how the third party will access your calls, emails and chat interactions e.g. via secure link/VPN or batch upload.
- Gather examples of your current contact center evaluation criteria.
- Gather a number of ‘best practice’ examples you may have collected over the years.
- Determine all the data points you will want to capture with the evaluation for data analysis e.g. reason for the call, product/service, customer emotions, FCR definition for your business, etc.
- Determine how you will handle ‘escalations’ and ‘kudos’ – customer interactions that should be investigated and/or celebrated urgently.
- Determine how you will handle ‘disputes’ – the ability for an agent or supervisor to request a review of results.
- Determine when you are going to launch (e.g. new month/quarter/year).
- And most importantly, introduce the program to your Team in a positive and transparent manner.

## Free, No Obligation Trial

If you are sold on the idea of outsourcing your Quality Monitoring or just intrigued by the possibilities, contact us for a no-obligation demonstration and ‘trial run’ of how VereQuest can help you lift results and deliver more value for your QM efforts.

We'll review a few representative calls/emails/chats and provide you with sample assessments and a detailed estimate. Get in touch today and let's talk!



Helping companies keep the promises they make®

Established in 2002, VereQuest provides organizations with a wide range of customer experience services including a robust contact center quality monitoring offering. Working with businesses throughout North America, VereQuest provides a unique perspective on a complex, ever-changing customer environment.

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