

## Evaluating Agents: The First Step in Transforming Your Organization

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**The primary purpose of evaluating agents isn't to change how customers experience the service you offer. Instead, the goal is to enable agents to perceive their interactions with customers as customers do. Here's what's new with software that can help you achieve this aim.**

If you're in a position to evaluate agents on how they communicate with customers, then you recognize how challenging it is to reduce their work to a score.

Fortunately, there are tools that can give you information to enable you to evaluate agents fairly and efficiently. Before we discuss software, let's establish exactly what your role is with regard to evaluating agents. Let's begin by clarifying the difference between evaluation and performance management. Performance management encompasses an entire customer care operation; an evaluation refers to an individual. When you evaluate an agent, it's essential to keep in mind that the agent is only responsible for what he or she can control. The criteria you use to evaluate agents ought to establish priorities, including minimum goals, for agents' responsibilities

For instance, you expect all agents to follow their schedules and to convey accurate answers to most questions from customers. It's usually easy to verify if agents fulfill these minimum goals, or, for that matter, any goals that aren't subject to interpretation. In terms of schedule adherence, for example, agents are either available or they aren't.

Although you may require all agents to meet baseline goals, it's not a good idea to evaluate all agents the same way. The criteria you use to evaluate agents ought to reflect agents' roles. For instance, the goals you define for an agent who is responsible for resolving technical issues are different from goals for agents who are responsible for collections. At a more granular level, if you plan a unique career path for an agent, you may want to refine the agent's evaluation criteria further to correspond to specific skills that the agent has the ability and desire to develop.

Evaluation becomes difficult when it requires judgment. Here is where I would like to share my viewpoint about the connections among quality monitoring, evaluation, coaching and training in the broader context of performance management. To sum up this viewpoint, I believe that evaluating agents inevitably transforms your business.

This thesis will serve as the basis for this article and for subsequent articles on related topics. In this article, we focus on software that enables you to establish guidelines for evaluating agents. In future articles, we'll describe tools that outline next steps for coaching and training based on evaluations of agents.

### EVALUATION = TRANSFORMATION

In customer care organizations where agents primarily communicate by phone with those they assist, the most valuable sources of information are recordings of conversations between agents and customers. Whether you record some or all calls, the acts of listening to and evaluating calls comprise what customer care organizations generally refer to as quality monitoring. As part of their evaluations, many customer care organizations also record activity on agents' computer screens during calls.

For an evaluation to make any difference to an agent, as well as to the organization the agent represents, you need to provide ongoing feedback about instances when agents do — and, in some cases, when they don't — communicate as effectively as they could have with customers. In many call centers, agents primarily receive feedback from supervisors and/or from quality assurance (QA) staff. This internal feedback, or coaching, refers to recommendations that reflect a call center's — but not necessarily customers' — priorities for how agents ought to assist people who get in touch with them.

Developers of quality monitoring systems typically offer software that lets supervisors or QA staff annotate recordings of agents' conversations so that they can easily refer to specific examples of agents' behaviors during evaluations of calls. In addition, these vendors usually provide software that enables those who evaluate agents to compare, and subsequently calibrate, their feedback. The purpose of calibration is to ensure that the feedback agents receive reflects how they interact with customers rather than the biases of the individuals who evaluate them.

As long as agents demonstrate the ability to do their jobs, coaching is often the prelude to training, a topic we will focus on in our next issue.

Before you can offer coaching or training to agents, you have to define what you want agents to accomplish during interactions with customers, whether it's informing customers of new products or persuading them to continue to remain customers. With that said, defining an agent's goal isn't the same as dictating how the agent should achieve the goal. You don't want the feedback you share with agents to exclude criteria that are open to interpretation. If, for example, you attempt to script everything an agent says, then you prevent agents from being able to acknowledge what customers tell them, as doing so would likely require agents to deviate from their scripts.

To increase your company's value to customers, you have to encourage agents to listen to customers. That, in turn, means you have to listen to agents. Listening requires interpretation, whether agents communicate with customers or you evaluate recordings of agents' interactions with them. As a result of listening, you gather information that helps you advise agents how to assist customers better.

When you evaluate agents, your goal isn't only to make them aware of how they currently communicate with customers; nor is it simply to modify agents' behavior. Your aim is to come up with a plan for what agents ought to learn from customers during future calls.

Knowledge is only transformative when it changes one's experience. The goal of an evaluation is transformative because its aim is to enable an agent, and, ultimately, your business, to experience interactions with customers from customers' viewpoints.

Indeed, an essential part of transforming your business is incorporating multiple points of view that include those of your customers. That is why our discussion of agent evaluation extends beyond internal feedback based on recordings of agents' interactions with customers; we also refer to feedback that comes directly from customers. Before we drill down on trends and tools in connection with agent evaluation, I'd like to offer several additional clarifications about this topic.

First, several vendors mentioned in this article offer a variety of performance management suites, including software for evaluating agents. We will describe these suites in our coverage of performance management software in a future article; in this article, we emphasize vendors' observations specifically about evaluating agents.

Second, you'll observe that several vendors allude to speech analytics as a tool for evaluating agents. As I noted in an article last month about trends in customer care technology, speech analytics is most useful for categorizing conversations based on words and phrases customers or agents say during calls. But I believe it's up to humans to determine the categories to which computers assign calls because only humans can recognize connections between

an agent's behavior and a call's outcome. The speed with which computers categorize calls certainly enhances your ability to link agents' actions to outcomes. But only humans can conduct root-cause analyses of calls; likewise, only humans can evaluate calls.

What follows is information about software that vendors have developed for — as well as vendors' recommendations about how call centers can improve their approach to — evaluating agents.

### **What are the most important new characteristics of software you offer for evaluating agents?**

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With the introduction of a sophisticated portal as part of our QM suite, agents are now much more involved in the evaluation process both in their ability to access relevant calls and evaluations, and in the ability to view and compare their performance (with their group, for example) in real time.

The portal is part of the NICE SmartCenter solution, which leverages the synergies of the combined capabilities of NICE for recording, QM, interaction analytics, customer feedback, workforce management and performance management.

Furthermore, the introduction of our coaching solution has helped turn a process that is very inefficient today into a very successful agent-empowering tool.

Today, coaching is mostly done side-by-side. These sessions normally constitute the first time agents hear their own calls, following which they receive supervisor feedback and a performance rating. The disadvantage of this approach, from the agent's perspective, is that he or she cannot come fully prepared and equipped to the evaluation meeting with a full picture of his or her performance. Another major challenge is the lack of time available to perform regular, timely coaching sessions.

With the NICE Perform portal, direct access for agents means that they can listen to calls prior to meeting with the supervisor. Agents receive coaching packages in the portal that can include the actual call, plus any other relevant documentation, presentations and training materials. And all of this is delivered directly to the agent's desktop in real time. They can perform self-evaluations and compare self-scoring with the scores provided by supervisors, as well as with the scores of their teammates or overall team scores, to gauge how well they are doing.

We have been seeing an increase in demand for our customer feedback solution, which is also part of NICE SmartCenter, and enables correlating a post-call IVR survey directly to the actual call. This allows a direct link between the customer's evaluation of agent performance with the supervisor's evaluation.

Such a comparison sheds light on the relevance and accuracy of the contact center's QA processes. It helps identify whether the parameters upon which the contact center determines an agent's performance level are in line with those by which customers determine their level of satisfaction. For instance, a company's parameter may be adherence to scripts, but a customer's parameter may be how long it took to get relevant information.

Furthermore, our clients are leveraging the precision monitoring capabilities of NICE Perform. Performing precision monitoring, in parallel to random, enables them to hone in on specific call types, such as those related to key issues such as first-call resolution, churn, up-selling, cross-selling or technical knowledge. With this new approach, in parallel to having a fair evaluation based on random sampling, clients are also enabled with timely handling of issues that are strategic to the enterprise.

Precision quality monitoring is driven by NICE's advanced multidimensional analytics. For example, contact centers that handle collections can hone in on specific customer interactions relating to strategic company goals, such as increasing agents' ability to locate and speak to the right party in order to increase the chances of getting a payment, a promise to pay or some type of action on the account.

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