Performance & Quality: the critical success factors

See how a focused review process can open up huge opportunities for change, as you involve colleagues and stakeholders in strategically reviewing the entire ‘ecosystem’ that supports effective performance and quality in a customer-focused organisation.

The massive industry groundswell is impossible to miss – not just in our own PPF professional community of best practice for customer experience and quality, but also in the focus on ‘personalisation’ in the Top 50 companies for customer service and in the 50 or more organisations engaged in the P&Q challenge workshops during 2013-14.

In many sectors, it is important to distinguish compliance from customer focus, but closely manage both. This is a core purpose of successful QA, where the scoring mechanisms will be totally different but held within a common framework.

For instance, the idea of the P&Q challenge is to support organisations in getting up to speed with using the Strategic Quality Framework, developed by ourselves and Martin Hill-Wilson, as a diagnostic and planning tool. The need arises from the extremely dynamic world that we now operate in. Many of the older internal and external drivers have given way to new ones, yet there is little best practice on how to keep responding to these in an integrated way. The focused review process shown in the framework comprises eight key decision areas; it is one example of attempting to reach this new level of capability as a customer-focused organisation.

Being privileged to meet with many pioneers, both in P&Q and our own PPF community, we wanted to share ten critical success factors (see box opposite), which we have discerned in organisations that are creating a new reality for performance and quality. Below this we also show some examples of the great work presented by the first ‘graduates’ from the P&Q challenge this year.

Risk management and process adherence are vital – at a P&Q event last year a poll showed that three-quarters of attendees are heavily influenced by regulation for instance. To focus and prioritise improvement, you need a mechanism for analysing the impact and risk associated with each process. Crucially, if we want to be a customer-centric organisation, this is not just about specific drivers, which are then built into the Quality Assessment framework. Aligning QA with strategic goals is equally important, because this allows QA to drive the behaviours and learning that the organisation needs. Use of the Planning Forum’s KPI pyramid model (page 20) may be helpful here. It also helps when the QA team can work cross-functionally in breaking down the silos that frustrate customers.

Performance improvement coaching is another key enabler. This means not doing the same thing for everyone, but using assessment to focus intervention. By segmenting advisors based on QA and risk analysis, you can prioritise the support budget for particular individuals or risk areas – almost always leading to greatly improved results. Alongside this it’s imperative to change the focus of calibration or levelling – a common practice – away from evaluating the agent towards listening to the customer, drawing learning from QA and building intuitive understanding of what ‘great’ looks, feels and sounds like. To achieve this you need highly skilled individuals to facilitate and own these conversations.

Space prevents us from describing all the critical factors in detail, but suffice it to say that colleague engagement and emotional engagement (see section 1 of this guide) are vital components of creating the culture that supports customer focus. Equally analysis & insight play a far larger role as the customer focus. Equally analysis & insight play a far larger role as the

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- Engage layer-by-layer; team leaders are key
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Adiba Ghauri is Mi & Resource Analyst at Harrow Council.

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- The doughnut – QA at centre, regular feedback to all
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Maureen Adams is Director of Customer Service and Stephanie Gibson is a Contact Centre Advisor at SOHA Housing Ltd, based near Oxford.

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We run on a single customer (at the moment) but the change was dramatic. The old process was low value, high in resource and drove the wrong culture. P&Q totally freed up our thinking. Trust, permission and the client made everything possible. Key success factors:

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- Align and integrate with business areas and their priorities

Julia Ashman is Head of Process, Assurance & Quality and Richard Newton is Red Alert Team Leader at Serco Global Services, Cardiff.

The ‘magic beans’ from which performance and quality grow

- Listen to your customer voice
- Buy in from key stakeholders
- Change business metrics to support a customer culture
- Align your approach with business & stakeholder objectives
- Feedback and coaching needs to be timely
- Engage all levels; develop together
- Challenge your culture, change negativity
- Be persistent and passionate, believe in yourself

Paul Smedley is Founder & Chair of the Professional Planning Forum, Chris Rainsforth is Customer Experience & Quality Specialist with the PPF.

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Critical success factors and challenges

This is a list of things that over time have proved critical for people who have achieved success. So have you considered these things? Which would you like to focus on next?

1. **Listen to your customer.** Be clear what matters to your customers. Align focus areas for performance and quality with voice of the customer insight so that we are driving changes and improvements in the areas that matter. Inevitably this means reviewing the QA framework.

2. **Change business metrics** to support a customer culture. Understand which existing metrics drive a negative behaviour and outcome. Develop metrics so people are empowered to deliver for the customer. Cannot not stick!

3. **Engage frontline colleagues.** Are they passionate about the customer? Do they feel a part of something rather than having something done to them? Develop your programme together. Let advisors shape what you measure or QA. If people aren’t engaged with your goals, they will get lost on the journey. Direct customer verbatims work wonders!

4. **Improvement focus.** Does everyone understand specifically what they need to change personally to improve customer experience? Direct net-promoter style customer feedback does not usually go deep enough. What data helps us go “under the surface” so we appreciate the impact we make in our own role?

5. **Improvement coaching.** We need to offer the right support and intervention, linked to measurable actions. Are the most important things actually improving? Do the right people get personal, timely, specific feedback and coaching? Do we have clear priorities? Do we track actual improvement?

6. **Understand what ‘great looks like’.** Can you rate calls (or other contacts) on a ‘gut feel’ and get scores that are aligned? Is this true across team? Do these scores align with customer feedback? The true purpose of calibration/levelling is not to normalise scores but to create common focus and develop intuitive understanding.

7. **Balance risk and customer outcomes.** In many sectors, compliance has become critical and it’s vital to manage these risks within an overall assessment framework that supports a genuine focus on the customers’ needs. Does your scoring mechanism support this? Do people understand the purpose of compliance? Or do people feel a conflict?

8. **Persistent and persuasive champions – As quality champions we have to be really passionate ourselves.** If you believe in the changes, ensure they are right and don’t give up. Establish confidence from business leaders that you are adding value and making a difference. Challenge your culture and turn around negativity.

9. **Buy in from stakeholders** in all the departments you need you work with. Integrate performance and quality with existing objectives and programmes in the areas you support. Emotional commitment will maximise success and make it possible to challenge cultures that need changing.

10. **Leadership and strategy.** Are performance and quality aligned with business objectives and strategy? Are they driving the behaviour and learning the business need? Are leaders, from the top down, genuinely convinced? Do they connect emotionally with people in telling a clear and convincing story of why customer focus matters?

11. **Continuous improvement.** Is the voice of colleagues and customers linked to a robust and well-designed programme for making changes, so that people feel listened to. How are changes communicated? Does feedback come from a representative mix of colleagues? Of customers? How is QA supporting this?

12. **Enterprise-wide learning.** Does the organisation have a good process for improvement across departmental silos? Does this change not just process but also policies and product development?

13. **Emotional intelligence.** To move a culture away from a “tick box” mentality, we need to develop our front line people. Are they self-aware? Able to engage customers emotionally? Delivering the right outcomes? Taking responsibility for their own development?

14. **Analysis & insight.** Use your QA outputs to maximum effect. Integrate into your continuous improvement and VOC programmes to add an additional layer of data, through a regular cycle of analysis.

15. **End-to-end customer journey.** Been able to track and review the end to end journey, looking at multiple channels (e.g. from web to phone to back office) and understanding if you deliver a consistent service throughout.

16. **Knowledge Management.** Advisors need access to better information and advice if they are to be free to get to the root cause and engage more personally. KM can document processes and identify where these are not working for the customer (where people need to ‘step outside a process’). KM can also drive the information that customers receive via digital channels.

17. **Speech and text analytics –** This can transform the detail of insight and feedback for all stakeholders, increasing sample size and granularity. You can dig into niche issues, personalise advisor feedback and gain are more accurate representation of performance, giving power to make better decisions to improve customer experience.

18. **Social media and collaboration –** The radical changes opened up by social collaboration can also be applied to performance and quality, changing the traditional mindset for how improvement activity takes place.

Top Factors for Current Success

1. **Engage frontline colleagues**
2. **Listen to your customers**
3. **Continuous Improvement**
4. **Buy in from stakeholders**
5. **Leadership and Strategy**
6. **Understand what ‘great’ looks like**
7. **Knowledge Management**
8. **Change business metrics**
9. **Improvement Coaching**
10. **Analysis and Insight**

Top Factors to address next

1. **Listen to your customers**
2. **Emotional intelligence**
3. **Change business metrics**
4. **Engage frontline colleagues**
5. **Knowledge Management**
6. **Social media and collaboration**
7. **Leadership and Strategy**
8. **Speech and text analytics**
9. **Analysis and Insight**
10. **Understand what ‘great’ looks like**
Learning from practical experience in each community

Student Loans – Creating a customer culture

Learning from PPF case studies has really helped develop the Quality team and processes. The biggest change in culture was changing the attitude towards scores, moving away from a tick-box mentality towards focus on personal ‘five star’ customer. Critical success factors:
- Engaging the front line teams, so that they develop and feel valued
- Knowledge management – if advisors are to be confident and consistent you have to give them the tools
- Analysis and Insight – understand what happens on calls

Sam Stokell is Quality Manager at The Student Loans Company.

Legal & General – Creating a customer culture

The external benchmarking and networking has helped us re-emphasise the basics and personalise service. Quality verbatim data was really powerful. We used to be very targeted on hard measures (eg answering within 20 seconds) but now that’s not the only thing people talk about. This has a calming effect on people, they can really care about the customer. Critical success factors:
- Listen to your customer
- Change business metrics to support a customer culture
- New P&Q measures: ‘what the customer needs’

Matthew Thomas is Customer Services Manager at Legal & General.

Aviva – Systems thinking and engaging colleagues

Involvement in the Top 50 has supported a change that was happening in the business. The external reference and great networking has helped us to see how others have implemented changes we are planning. We also get a raft of really granular, specific data about each section of the call, which complements our transactional NPS. Key success factors:
- Reward staff on customer service, not sales targets. Our targets
- Engaging colleagues – an engaged front-line can absolutely tell us

Heather Guest is UK Direct Communications Manager at Aviva.

Motability Operations – Emotional engagement: loving the customer

Our biggest change has been separating performance assessment from development. People now own their own development, as part of our Trinity Model. Advisors learn from every call, recognising situations where they could have been better. Little things make the biggest difference – the conversations you are having or not having. Critical success factors:
- Engaging front line teams is the foundation for it all
- Emotional intelligence – self-awareness is fundamental
- Knowledge management – the ‘unsung hero’
- Leadership & strategy – we reward ‘lovers’ not ‘fakers’

Ivan Smith is Head of Support Services at Motability Operations.

Charities Aid Foundation (CAF) – See what matters to customers

There has been a huge step change in our culture as a charity and the external benchmarks across all sectors has helped us engage our people and show that our changes were for the right reason. We’re also involved with P&Q, helping us look at real quality, not just compliance, and giving colleagues confidence in looking at things from the customer point of view. Key factors:
- Voice of the customer was incredibly important, not just CSAT but real verbalisations
- Changing metrics - focus on First Contact Resolution rather than speed of answer for example, because it matters more to our customers
- Confidence – we’ve grown our staff in their belief about what they can do

Hannah Billing is Customer Service Manager and Alexandra Downs is Team Leader from the CAF.

nPower – Putting the customer at the heart

We are halfway through a journey that puts the customer at the heart of everything we do, an example of which in QA is using customer feedback for soft skills. One of our biggest successes in the last year has been standardisation of processes, which is what our customers are asking for, and helping advisors focus on what the customer wants on each call. Visits to other centres really helped me understand how the QA system reflect the business culture and the things you are trying to drive. Critical success factors:
- Listen to your customer; use customer feedback
- Analysis & insight – away from tick-box towards insight
- Continuous improvement – identify processes that need changing

Kevin Richardson is Customer Experience and Compliance Manager at nPower.

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CPM UK – Integrate principles with existing cultures

One size doesn’t fit all! We provide outsourced sales and service Contact Centre solutions for blue chip clients. Each client and team has their own unique culture and success factors, so we have taken a ‘toolkit’ approach to P&Q to ensure parity with both the client’s & businesses vision for success through:
- Identifying and implementing relevant solutions
- Evidencing that outputs are adopted and aligned to P&Q
- Providing a robust plan to drive Quality improvement – i.e. volume, actions & impact

Carys Brinkworth is Operations Manager and Tracey Mallett is Training Executive at CPM UK.

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Set free to focus on the customer: what colleagues need from QA today

A fundamental change in the role of Quality Assurance is releasing real energy among colleagues, underpinned by a well-designed framework, great quality analysts and an enabling performance culture. Above all, this drives a new understanding of what ‘good’ and ‘great’ looks like.

A culture that genuinely sets our people free to put the customer first always involves a fundamental shift in QA – away from the traditional call-centre tick-box approach which became so embedded 10 or 20 years ago. Let’s start with some real-life results. At Experian in 2012/13, customer retention rose 38% and overall satisfaction 11%.

In many sectors, it is important to distinguish compliance from customer focus, but closely manage both. This is a core purpose of successful QA, where the scoring mechanisms will be totally different but held within a common framework.

At Motability Operations, the Customer Satisfaction Index rose from 90% to 96%, by gaining more of the perfect ten out of ten customer scores. Significantly this call-centre tick-box approach which Contact Resolution from 80% to 91% and employee engagement scores reached a staggering 95%. Four factors mark the operational framework that enables this success. Firstly advisors are given the freedom to do what was needed to meet the customer’s need; in some case stepping away from the standard process where this was not appropriate and taking steps to amend the processes for the future. The power of this from the point of view of individual advisors, let alone customers, cannot be overstated.

At Home Retail Group (page 73), this is closely linked with a continuous improvement programme and changes in how individuals are targeted and rewarded. Often individual advisors can gain direct customer feedback from post-contact surveys, as we saw as far back as 2010 with the Brilliance programme at Orange UK, now part of EE. Sometimes, to start with, this replaces the traditional focus on QA in determining ‘what good looks like’. As the approach matures, if there is analytical strength in the QA team a radically changed QA assessment framework is usually a vital factor in helping front line advisors improve and develop. Here QA needs to be carefully aligned with customer feedback, as at npower in 2012, and the framework can apply not just in the call centre but in some cases across back office functions as well as for emails and other contact types or channels, as at UK Asset Resolution.

As well as the scorecard, the assessment framework sets up the ways in which the outputs from quality are used, which is why coaching and development is closely linked. We must determine how any scores are used for performance management and how advisors are enabled to offer improvement suggestions and feel they can make a difference. As the diagram illustrates, there is a very strong link between this development framework and the freedom that advisors feel – the common link is a change in the assessment framework, one part of which is a radically different kind of scorecard.

Vitally, a successful framework for assessment will drive a much clearer appreciation, at all levels, of ‘what good looks like’ and how to support tangible improvement. For instance, at UK Asset Resolution, Dave Conway, Performance Improvement & Quality Manager, speaks about ‘improvement-focussed coaching’. 88% of colleagues improve their quality scores by the end of the month they are being supported, with 83% maintaining improvement after 3 months. This is a solid return on investment by any account.

In sectors with a strong regulatory focus, it is important to distinguish compliance from customer focus, but closely manage both. This is a core purpose of the successful assessment framework and can be seen clearly in the new case study from Experian (page 71), where even the scoring mechanisms for process and compliance are different from those used for the skills and capabilities that drive customer experience. The scoring is different because it needs to drive different changes and behaviours.

At Worldpay (page 93) too, scores have improved month on month for almost every advisor, rising nearly 20% in just 8 months. As at Experian, competency maps document what is expected at each level, so everyone understands how they can develop and – crucially – believes the right people are gaining recognition. Significantly, NetPromoter (NPS) rose 40% early in the implementation at Worldpay and the new QA framework was an essential ingredient of success in freeing advisors to focus on customer needs, injecting personality and energy into each stage of every call as they became confident about what ‘good’ or ‘great’ looks like in different situations.

As in a growing number of contact centres, the process ticklist and percentage scores were replaced by principles that document what is expected at all levels of performance. Significantly, these new standards were discussed in workshops with every advisor and they identify behaviours that cause a call to fail QA and also how to go beyond being simply ‘good’, so that everyone develops and improves. There is also a very strong link between the freedom an advisor feels, the assessment framework and a link into a wider continuous improvement framework that helps apply insight about what drives customer satisfaction and loyalty throughout the organisation and starts to integrates quality and ‘voice of the customer’. People feel free when they can suggest ideas, feel listened to and feel that things are genuinely changing for the better for customers.

Paul Smedley is Founder & Chair of the Professional Planning Forum. Chris Rainforth is Customer Experience & Quality Specialist with the PPF.

Digging Deeper: see these case studies and presentations

Assessment Framework

If you are re-thinking quality, there are four vital elements that your assessment framework needs to cover:

1. Processes need documenting and monitoring and maintaining. If they don’t work for the customer they need changing! Knowledge management systems are a great enabler for this.

2. A mechanism for understanding the impact and risk associated with these – if you want to focus improvement most effectively you need this analysis in order to prioritise. This is not just about compliance; if you follow the customer journey, you can map the customer outcomes and make risk analysis genuinely customer focussed.

3. The competencies and behaviours that drive your desired customer experience, as well as your cost base. It is a striking fact about most modern scorecards that now focus on the skills and competencies that an individual advisor is displaying in the conversation.

4. It is essential that QA is correlated and aligned with customer feedback and corporate goals. When you bring together both outcomes and capabilities, you have influence over the factors that truly drive customer experience. You can predict expected customer results based on your organisation’s capability and processes.

Caution: what you measure is what you get!