



**Office of Children
and Family Services**

**Human Services
Call Center**

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Quality Assurance Manual

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1.1 OVERVIEW AND PURPOSE

This Quality Assurance Manual aims to provide best practice procedures for implementing the consolidated call center quality assurance program. The quality assurance program enables anchor agencies to provide best in class customer service to both its own customers and those of their customer agencies by reviewing call center agent performance in a standard way on a regular basis. While the primary goal is to assess agent performance and identify agent development opportunities, the results of the quality assurance procedures within this manual may also be used to assess customer satisfaction, improve training programs, and enhance knowledge base content.

1.2 CALL MONITORING TEAM

The Call Monitoring Team, consisting of members of the Quality Assurance unit as well as agent supervisors, will be responsible for reviewing calls, addressing skill deficiencies, and recognizing superior agent performance. Specific responsibilities include:

- Scoring the appropriate number of calls per agent per month in order to identify skill gaps and provide feedback on service levels
- Providing direct coaching to agents based on the team's findings (usually done by unit supervisors with information provided by Quality Assurance unit members)

Upon monitoring the calls, the Call Monitoring Team should conduct a monthly meeting to identify trends in skill deficiencies across the entire group of agents. Based on this conversation, additional training will be designed and implemented in order to drive continuous improvement.

The Call Monitoring Team will conduct quarterly calibration sessions in order to align scorecard grading practices. All call monitors should score the same list of recorded calls.

Results with a wide range of scores should be discussed as a group until a consistent grading standard can be decided upon.



1.3 CALL MONITORING FREQUENCY

Review frequency should vary based on agent tenure within the call center. As an agent becomes more experienced, the number of calls reviewed should decrease. If an issue arises with an agent’s performance, additional call monitoring should be conducted.

Table with 2 columns: Agent Tenure, Minimum Frequency. Rows include: Under 1 month (2 calls/day), 1-6 months (3 calls/week), Beyond 6 months (8 calls/month), Additional monitoring due to poor performance (3+ calls/week).

1.4 CALL MONITORING SELECTION PROCEDURE

Calls should be randomly selected among the different days of the week, times of the day, and Lines of Business the agent takes calls for in order to provide a well-rounded perspective on an individual agent’s typical performance. Call monitors should also select some calls based on their noteworthy characteristics (e.g. longer than average talk time, unusually long hold times, etc.) given the calls’ inherent coaching opportunities.

1.5 CALL SCORECARD

The HSCC Scorecard is composed of 20 questions and is scored on a 0 to 100 scale. Roughly half the questions focus on basic customer service skills. The other half look at specific job skills. Each numbered question is worth 5 points. Questions #9 and #19 have 2 parts each. Each part of the question is worth 2.5 points. A minimum acceptable monthly score average is 85 for each call agent. Average scores below 85 will trigger additional call monitoring and a detailed remediation plan for the call agent. Past months’ data will be reviewed and compared against the current month to identify trends and to ensure that call agents improve in their quality. The scorecard also contains a narrative section that the call scorer should use to record an overall impression of how the call went, suggestions for improvement, and to record any “critical errors” found during the call. Critical errors include the agent hanging up on the caller abruptly without resolving the customer’s inquiry, using inappropriate or abusive language, or inappropriately disclosing confidential information to or about a caller.



Scorecard Questions

Opening & Greeting

- 1 **CCR used designated greeting (identified self and offered assistance)
- 2 Captured client's phone number, First and Last Name accurately, where applicable/provided

Demonstrate Professional Etiquette

- 3 Communication is clear, used plain language i.e. no jargon, displays confidence and explained appropriate terminology, as necessary
- 4 **Maintained an appropriate tone with the client, including volume, speed, and enthusiasm
- 5 **Demonstrated active listening and acknowledgement, being careful not to interrupt/over talk
- 6 Professional & courteous behavior extended during call, i.e., used caller name, please/thank you
- 7 Showed empathy, apologetic, validate concern/complaint

Call Resolution/Demonstrate Knowledge Proficiency/Technical Skills

- 8 Correctly identified the problem and needs of the caller
- 9a **Utilized Positive Phrasing throughout call: suggested alternatives & choices, state desired behavior, stress positive consequences
- 9b **Maintained call control, kept caller informed of actions throughout call
- 10 **Used Guided Assistance or Knowledge Base and approved research methods effectively
- 11 Followed scripting guidelines properly
- 12 **Utilized call hold appropriately, including asking for hold permission/advising of the call hold and not exceeding hold time length
- 13 **Utilized call transfer appropriately, including advising the caller of transfer, and transferring the call to the appropriate Level
- 14 Sought and followed supervisory assistance, as necessary (i.e., followed Escalation procedure, coded as "*Escalated to Supervisor*," etc.)
- 15 Maintained program and workplace confidentiality (use sensitivity, destroy records accordingly, only provide LOB #/address as authorized)
- 16 **Coded Ticket and Call Summary properly, i.e., used "*Add Text to Thread*" or "*Send on Save*," etc.
- 17 Handled administrative work appropriately, i.e., completed information for mailing forms, etc.
- 18 Guided caller to correct resource(s) and resolved the call

Call Closure

- 19a Documented all required information properly and confirmed the information with the customer
- 19b Summarized steps to resolution of problem, if necessary
- 20 Demonstrated appropriate closing

1.6 AGENT FEEDBACK SESSIONS

Upon completion of the monthly call monitoring process, agent supervisors should set up individual one-on-one feedback sessions with their respective call center agents. These meetings should be scheduled in a timely manner following the call monitoring process and no later than by the end of the month. These meetings are an opportunity to review call monitoring results and areas for agent improvement, and serve as a two-way dialogue to improve agent development and call monitoring processes.



1.7 PERFORMANCE RECOGNITION

Performance recognition should occur on a monthly basis after call monitoring has occurred. A list of agents with perfect QA scores for the month should be recognized through an office bulletin board or e-mail newsletter. Showcasing and honoring top talent further incentivizes agents to improve their performance, and reinforces the culture of prioritizing high quality customer service.

1.8 AGENT FEEDBACK CONSIDERATIONS

Consideration will be given to tailoring agent feedback based on the individual agent's stage of development. The focus will be on helping new agents to perform satisfactory work, to help agents performing in a satisfactory way to have excellent performance, and to recognize and encourage agents having excellent performance to continue doing so.