



DELIVERING
FIVE-STAR SERVICE
WITH
BACK-OFFICE QUALITY MANAGEMENT

Many factors contribute to a restaurant receiving a five-star service rating. Some are visible to the customer and some are not. But the key ingredient is the food itself, and generally the customer is unaware of all that goes into its preparation.

It is the same in many service organizations. The customer and at times even the manager have little visibility into how work is processed in the back office, a part of the organization which is typically not customer-facing but is where orders and service requests are executed.

By creating an "open view" of how work is processed in the back office, your organization can drive critical decision making across its operations. Rather than continuing with the traditional approach of randomly sampling transactions and performing post process quality reviews or audits, you can take your organization to the next level by providing real-time, in-process guidance. This insight can help you spot areas for quality enhancement and create a continuous quality improvement program, helping you deliver the five-star service that cultivates customers for life.

BACK-OFFICE ORGANIZATIONS WITH QUALITY MANAGEMENT PROGRAMS EXPERIENCE:

- > **20%** GREATER EMPLOYEE UTILIZATION RATE
- > **9%** YEAR-OVER-YEAR INCREASE IN ANNUAL COMPANY REVENUE
- > **6.3%** YEAR-OVER-YEAR INCREASE IN CROSS-SELL AND UP-SELL REVENUE

SOURCE JANUARY, 2016: ABERDEEN GROUP

POST PROCESS
REVIEWS

IN-PROCESS
GUIDANCE

CONTINUOUS QUALITY
IMPROVEMENT



POST PROCESS REVIEWS

Most quality reviews are completed as a post-event audit. The goal is to:

- Validate compliance
- Correct any improperly processed items
- Evaluate employee skills and performance.

Two ways your organization can increase the quantity and value of post-process quality audits include:

PERFORMING TARGETED
SELECTION IN ADDITION TO
RANDOM SAMPLING

"REPLAYING" TRANSACTIONS

SUCCESS STORY



POST PROCESS REVIEWS

PERFORMING TARGETED SELECTION IN ADDITION TO RANDOM SAMPLING

Random sampling enables managers to “spot check” work across employees and work types. But to be more effective, you also need the ability to select tasks for review based on work types, customer profile, employee, risk, and other attributes.

Data-driven quality management solutions enable the capture of these attributes and automate the routing of transactions to reviewers versus manual selection and retrieval, saving significant time and hassle. They also standardize evaluation forms and processes across locations and functions for improved service consistency. When post-process quality management is applied to the back office, organizations can positively impact the contact center and customer experience by identifying, analyzing, and correcting processing tasks that are causing high volumes of repeat calls.



POST PROCESS REVIEWS

"REPLAYING" TRANSACTIONS

Because of the many systems used in back-office operations, quality analysts are unable to "replay" and review transactions. Instead they have to recreate the process to see if they achieve the same outcome as the employee. They have very little insight into what actually happened.

With the use of screen recordings, examiners can review the actual steps taken, helping them to identify errors that were made and providing insight into the decisions that led up to those errors. Screen recording can significantly reduce the amount of manual review and play-by-play re-navigation of the work for examiners, while also facilitating greater accuracy in the assessments.

Replaying transactions enables reviewers to pinpoint errors and process deviations and "play back" transactions.



POST PROCESS REVIEWS



POST PROCESS REVIEW

SUCCESS STORY

A large, multi-line insurer wanted to increase the efficiency, frequency and prioritization of quality reviews in its Individual Annuities line of business. Each of the multiple functions within the group had its own disparate processes and tools.

The insurer implemented Verint® Quality Management™ for 6,000 employees conducting both phone and off-phone/back-office processing work. By establishing a standardized process and tool, the insurer achieved a number of benefits.

› **SPEED**

Decrease the amount of time quality analysts spent collecting and reviewing transactions.

› **EFFICIENCY**

Increase the number and types of transactions reviewed.

› **INSIGHT**

Tie transactions together to view quality by process, customer, risk-type, dollar value, or product.



IN-PROCESS GUIDANCE

Back-office employees are often at the mercy of disparate legacy systems, complex work flows, and manual processes. The goal of in-process quality is to:

- Assist employees in navigating this environment.
- Provide them with contextual knowledge to improve transaction handling.
- Streamline and automate steps and workflows.

Your organization can impact quality standards during the execution of work by:

SIMPLIFYING WORKFLOWS
AND AUTOMATING PROCESS
REMINDERS

ALLOCATING WORK TO THE
RIGHT EMPLOYEE AT THE
RIGHT TIME

PROVIDING CONTEXTUAL
KNOWLEDGE

SUCCESS STORY



IN-PROCESS GUIDANCE

SIMPLIFYING WORKFLOWS AND AUTOMATING PROCESS REMINDERS

Managers often lack visibility into how work is processed in real time. Who took what steps, who skipped some, and who repeated others?

The ability to visualize processes can help you easily identify opportunities to streamline steps, consolidate screens, and automate data propagation across systems.

In addition, the ability to provide pop-up reminders of the next step based on the type of work being done, the employee's performance score, and the employee's previous and current screen-based activities, can help improve processing speed and compliance. This is especially helpful for new hires as they first learn processes. When they become competent, these prompts or reminders can be turned off.



ALLOCATING WORK TO THE RIGHT EMPLOYEE AT THE RIGHT TIME

Timely turnaround in processing transactions is a key factor in meeting customer expectations. In-process quality also requires the allocation of work to employees based on priority and employee skills, so that:

- Items closest to due dates (or for high-value, high-priority customers) are handled first.
- Employees with the necessary skills are assigned the work, decreasing the likelihood of errors and increasing processing speed.



PROVIDING CONTEXTUAL KNOWLEDGE

Back-office transactions are heavily dependent on knowledgeable, skilled employees. Providing real-time guidance and contextual documentation throughout the process can:

- Eliminate lost time searching knowledge bases and document repositories or seeking out peer advice.
- Increase employee efficiency and accuracy.
- Reduce errors that lead to poor customer satisfaction and compliance.



IN-PROCESS

SUCCESS STORY

A leading financial services provider sought to increase member satisfaction in its insurance businesses. Because of multiple legacy systems, employees had to either copy/paste or retype data from their member information system into the various product systems used for their insurance lines. By automating the population of key data from one system to the next, the organization was able to:

- **REDUCE ERRORS**
- **INCREASE PROCESSING SPEED**
- **IMPROVE MEMBER SATISFACTION**

A large, specialized technical services outsourcer was experiencing inconsistent customer service by time of day and location. By providing real-time, pop-up contextual scripts and process flow reminders, the company was able to improve the consistency of employee behavior and messaging on service calls.



CONTINUOUS QUALITY IMPROVEMENT

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Your organization can impact quality standards during the execution of work by:

IMPROVING EMPLOYEE
COACHING AND SKILLS

CAPTURING
COMPREHENSIVE DATA

UNIFYING SOLUTIONS

INCORPORATING
CUSTOMER FEEDBACK

INVOLVING THE ENTIRE
ENTERPRISE



CONTINUOUS QUALITY IMPROVEMENT

IMPROVING EMPLOYEE COACHING AND SKILLS

Having resources with the expertise to execute the work and ensure quality while doing so is critical to achieve cost and customer service goals. Coaching and continual learning are essential for maintaining employee expertise.

With the latest coaching and elearning solutions, managers can immediately recognize, flag, and assign coaching or learning directly from the quality evaluation forms with minimal manual effort. The completion of assignments can be automatically recorded in the same tool, so performance improvements can be tracked and correlated.



CONTINUOUS QUALITY IMPROVEMENT

CAPTURING COMPREHENSIVE DATA

Organizations need to be able to capture data from many sources and derive actionable intelligence that enables them to:

- Compare performance and identify trends across functions, product lines, and customer segments.
- Tie front- and back-office activities to gain a comprehensive, end-to-end view of the quality of service provided at each step in the customer's journey.



CONTINUOUS QUALITY IMPROVEMENT

UNIFYING SOLUTIONS

To create a continuous improvement loop requires unified solution platform, integrating quality, coaching, eLearning, performance management scorecards, desktop analytics, knowledge management, customer feedback and more. The ability to pull in and share data in a standardized framework across the enterprise helps create a trusted, single source of truth for quality and performance data.

Once information is housed together, organizations can more readily identify trends, areas of risk, and opportunities for continual improvement.



CONTINUOUS QUALITY IMPROVEMENT

INCORPORATING CUSTOMER FEEDBACK

Capturing customer feedback on back-office processing quality and timeliness through surveys and advanced speech and text analytics is not enough. Organizations need a means of translating the feedback into action and monitoring resulting changes to determine the impact of those changes on customer engagement and the bottom line.



CONTINUOUS QUALITY IMPROVEMENT

INVOLVING THE ENTIRE ENTERPRISE

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TECHNOLOGY

Verint® Enterprise Workforce Optimization™ is a unified platform of solutions that provide unprecedented visibility into your operations, helping you:

- Capture and analyze customer interactions
- Improve workforce performance
- Streamline processes and ensure quality and regulatory compliance
- Enhance customer engagement and retention.

POST-PROCESS

IN PROCESS

CONTINUOUS QUALITY
IMPROVEMENT



TECHNOLOGY

POST-PROCESS

QUALITY MANAGEMENT – A unified solution dedicated to quality providing flexible evaluation forms, automated workflows, and robust reporting that ties directly to feedback loops and performance measurement.

SCREEN RECORDING – The ability to capture desktop screens for a play-by-play of what happened during the execution of the work and provide a forensic view into the execution of work.

COACHING/ELEARNING – Unified coaching and eLearning solutions tied directly to your quality and performance management solutions helps improve employee skills and knowledge, reduce errors, and increase processing speed.

DESKTOP ANALYTICS – A desktop agent able to collect, tag, and archive data from the various screens and systems to be used in the search and retrieval of transactions for quality review.



TECHNOLOGY

IN PROCESS

WORK ALLOCATION – The automatic distribution of work based on employee skills, availability, work priorities, and deadlines. The solution places the right work, at the right time, into the right employee's hands to help ensure efficient and thorough processing that meets or exceeds service goals.

KNOWLEDGE MANAGEMENT – A knowledge base that puts intelligent answers at your employees' fingertips for a fast, accurate, and consistent response, enabling robust search and the automatic delivery of context-based knowledge.

AUTOMATION – Eliminating redundant, manual work steps to help reduce errors and speed turnaround times.

GUIDANCE – The delivery of prompts to employees as they're executing work, reminding them of next steps and/or delivering contextual alerts if a work item has special requirements.



TECHNOLOGY

CONTINUOUS QUALITY IMPROVEMENT

DESKTOP ANALYTICS – The ability to capture data elements and actions from an employee's desktop to better understand the dynamics between people, systems, and processes and the impact on quality.

PERFORMANCE MANAGEMENT – A standardized framework for capturing and transforming data into key performance metrics for evaluation against goals.

COACHING/ELEARNING – An integrated solution that delivers web-based eLearning to employee desktops combined with functionality to assign and track coaching sessions, capture comments from manager and employee, and monitor effectiveness of the training or coaching.

CUSTOMER FEEDBACK – Multi-channel (including IVR, web, and mobile) transactional surveys and context-based surveys to capture data on products and services, processes, staff performance, and customer loyalty and satisfaction levels.

PROCESS VISUALIZATION – Real-time process maps showing process steps and variations taken to execute a process, including drill-down capability to identify root causes of bottlenecks and non-compliance.

CONCLUSION

Just as the executive chef must oversee all aspects of a restaurant's kitchen to ensure a five-star meal is served, organizations must keep a constant watch over all the elements that impact quality: people, processes, and technology. Optimizing quality entails some crucial activities:

- Moving beyond simple post-event quality reviews to provide employees with the tools and knowledge to ensure accurate, timely execution as they process work.
- Streamlining, automating, and integrating quality evaluation process and systems.
- Creating an enterprise view of the customer journey and all the touchpoints that impact service.
- Establishing a standardized framework for capturing, analyzing, sharing, and acting on a comprehensive set of customer and employee work and process data.
- Cultivating the mindset that quality is an ongoing, continuous improvement program.

By optimizing quality management in the back office and creating a continuous quality improvement program across the enterprise, your organization can improve operational efficiencies and employee utilization, experience higher year-over-year revenues, and greater cross-sell/up-sell revenues than counterparts who don't.


ABERDEENGROUP

Aberdeen Group is a technology and services company that helps tech sales and marketing executives distill smart data science into actionable moments. We help companies win through our unique targeting capabilities (using our CI Technology Data Set), advanced analytics using our own innovative proprietary and public data sources, and our original and research based content engine. Learn more about Aberdeen Group at aberdeenservices.com.

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