

e | e



InTelegent Basics: CSCG Educational Series Conference Calls

Quality Call Review

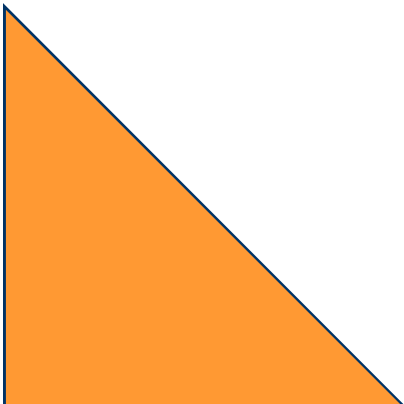
Presented by

i n T e | e g y

January 9, 2008

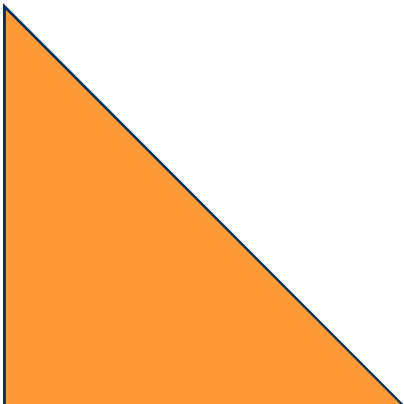
Agenda

- **Overview of Call Review**
- **Call Review Technology**
- **Call Review Forms**

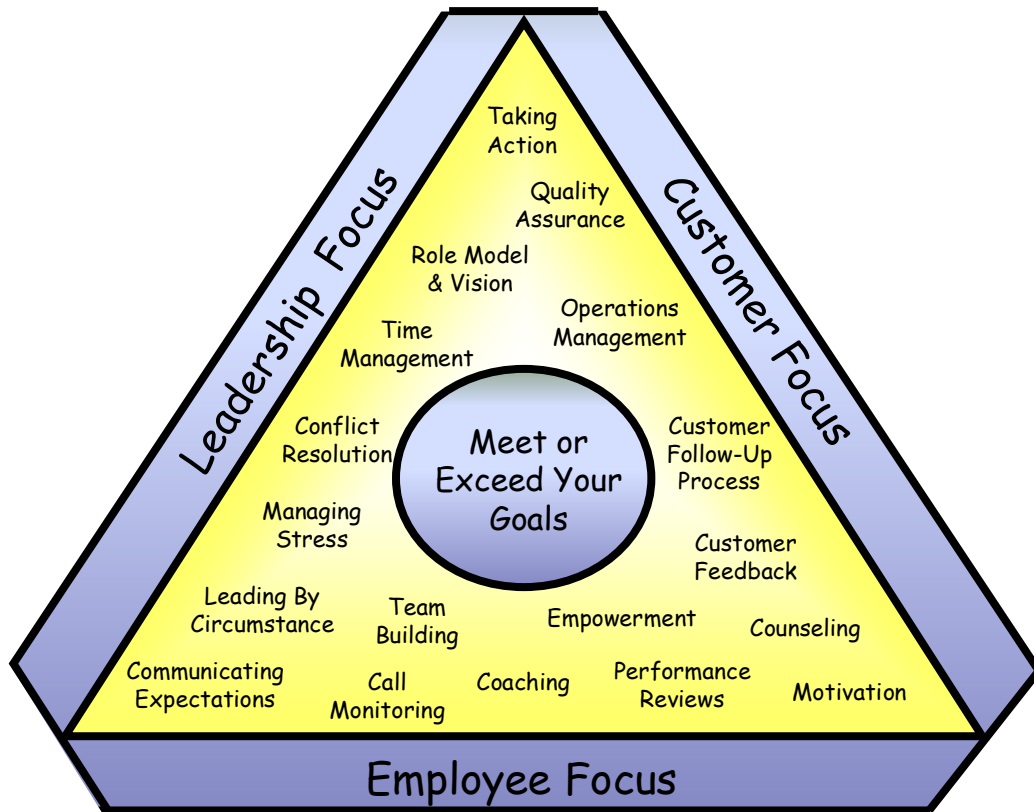


Learning Objectives

- **By the end of this module you should be able to:**
 - Define Call Review
 - Define the Benefits of Call Review in the Service Center
 - Describe Management's area of focus and the use of call review
 - Describe the types of call review
 - Describe the 5-step process for conducting a call review
 - Identify some basic call review technology options



Management Areas of Focus



Call Review Is:

- **Client Focused:**

Management can hear what the clients are saying, first hand

- **Employee Focused:**

Management can give immediate feedback to employees regarding process and client service.

- **Leadership Focused:**

Ability to verify eligibility processes and assess client service

e/e

Definition of Quality Call Review

Call Review is the process by which supervisors listen to calls to ensure that quality call handling practices are observed in the service center. Coaching is a process supervisors use to help employees learn new behaviors, maintain existing positive behaviors and/or further develop their capabilities in a specific area of performance.



Call Review Benefits

The main benefits of call review are:

■ For the phone worker:

- Provides feedback, tips and tools on how to handle unique types of calls
- Enhances the training process supporting employees as they learn new skills and behaviors
- Allows opportunity for management to acknowledge the worker's ability to handle calls well and provide positive feedback

■ For the Management Team:

- To identify training opportunities
- To identify client concerns, program questions and feedback to help improve processes within the service center

■ For the Client

- Assists in delivering consistent and accurate information; ensuring that benefits are appropriately provided and that communication is timely.
- Ensures each service center contact to be a positive and productive process.



Types of Call Review

- **Undetected or Remote Call Review**
- **Detected or “Side-by-Side” Call Review**
- **Recorded Call for future review:**
 - Self Review of Calls
 - Supervisor Review of Calls
- **Peer Call Review**
- **Management Calibration Session**



Supervisor calibration

■ Management Calibration Call Review:

The practice of supervisors and managers reviewing recorded calls together and calibrating scoring processes:

- Ensures that scoring is consistent across Supervisors
- Allows Supervisors to exchange ideas and views on call review scoring
- Re-enforces the need to consistently call review



e/e

Call Review Expectations

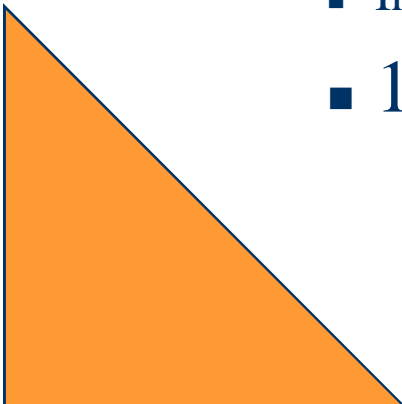
■ Typical Expectations

■ Private Sector Call Center

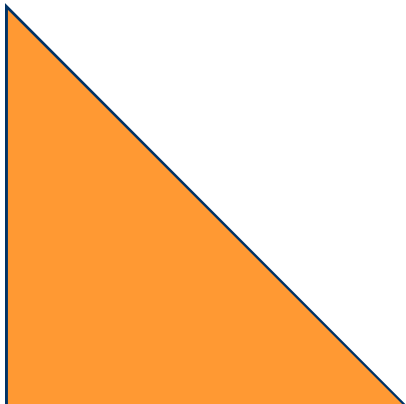
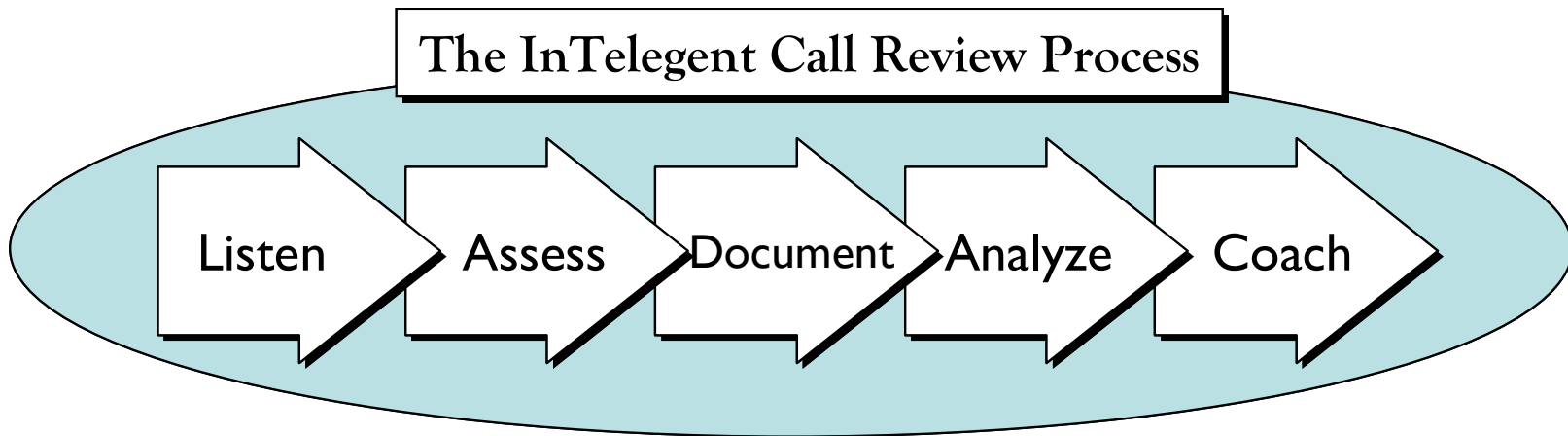
- 2 call review sessions/rep/week
 - Includes feedback session within 24 hours of call review
- 1 management calibration session per month

■ County Service Center

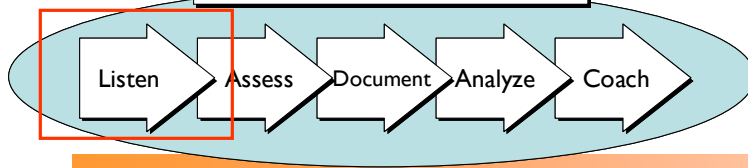
- 2-4 calls reviewed per month
 - Includes feedback session within 24 hours of call review
- 1 management calibration session per quarter



Call Review Process



The InTelegent Call Review Process



Select a Recorded Call

ULTRA IntelliPortal - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Quality Home VERINT

Search Preferences

Contacts: 1 - 4

Save Search

Start Time	Play	Duration	Agent	Dialed From (ANI)	Dialed To (DNIS)	Extension	Data
3/12/2007 4:41:59.2 PM		00:01:55	Anabel Silva	7607311041	8490		
3/12/2007 4:34:04.4 PM		00:04:07	Anabel Silva		8490	6446	
3/12/2007 4:24:37.9 PM		00:06:22	Anabel Silva	8314779204	8490	6446	
3/12/2007 3:55:09.4 PM		00:00:18	Anabel Silva	6446	8333	6446	
3/12/2007 2:36:50.8 PM		00:01:01	Anabel Silva	8313353024	6446	6446	
3/12/2007 2:22:50.4 PM		00:03:09	Anabel Silva	8318018409	8490	6446	
3/12/2007 2:16:24.7 PM		00:04:53	Anabel Silva	8317639224	8490	6446	
3/12/2007 12:54:51.5 PM		00:04:04	Anabel Silva	8317077250	6446	6446	
3/12/2007 12:48:19.3 PM		00:03:56	Anabel Silva	8317619279	6446	6446	
3/12/2007 12:42:27.2 PM		00:03:11	Anabel Silva	8317511533	8490	6446	
3/12/2007 12:36:32.6 PM		00:03:57	Anabel Silva		8490	6446	
3/12/2007 12:30:52.1 PM		00:03:03	Anabel Silva	8317613748	8490	6446	
3/12/2007 12:09:11.3 PM		00:08:29	Anabel Silva		8490	6446	
3/12/2007 12:03:30.5 PM		00:01:29	Anabel Silva	6446	95887350	6446	
3/12/2007 12:01:03.5 PM		00:01:22	Anabel Silva	6446	8487	6446	
3/12/2007 11:38:40.4 AM		00:09:14	Anabel Silva	8317248597	8490	6446	
3/12/2007 11:08:44.0 AM		00:00:13	Anabel Silva	6446	8333	6446	
3/12/2007 10:59:10.3 AM		00:05:22	Anabel Silva	8314643286	8490	6446	
3/12/2007 10:56:27.6 AM		00:01:35	Anabel Silva	8313354054	8490	6446	
3/12/2007 10:48:23.9 AM		00:05:04	Anabel Silva	8314756882	8490	6446	
3/12/2007 10:34:02.3 AM		00:10:35	Anabel Silva	8314752068	8490	6446	
3/12/2007 10:29:53.7 AM		00:03:21	Anabel Silva	8317687880	8490	6446	
3/12/2007 10:19:10.5 AM		00:06:29	Anabel Silva	8317283797	6446	6446	
3/12/2007 10:17:11.5 AM		00:01:56	Anabel Silva	6446	6496	6446	
3/12/2007 10:10:45.3 AM		00:02:43	Anabel Silva	6446	6496	6446	

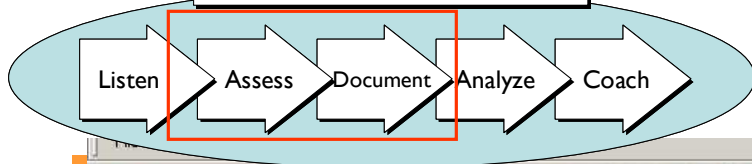
Done

Local intranet

Start | ULTRA IntelliPortal - ... | Course Content - Particip... | Desktop 1:32 PM



The InTelegent Call Review Process



Assess & Document the Call

Quality Home | Back to list

VERINT

Search Preferences Help

Contact Information Download Send Delete Customer Xperience Flags Flag Edit Form

Segment 1/1 - (Start 2:15:08 PM)

Form Name: Call Review Form (filled)

General Information

Form Name: Call Review Form
 Reviewer: James Dyer
 Reviewed On: 3/26/2007 5:04:30 PM
 Agent Name:
 Group Name: All Agents
 Data 2:
 Data 3:
 Notes:

Call Standards Percentage: 66.25

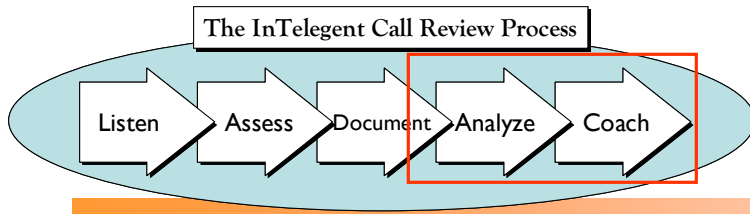
	Excellent	Good	Average	Fair	Poor	N/A	
Opening / Greeting							13
Uses appropriate opening greeting	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		3
Determines reason for call	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>		4
Verifies client case number and/or personnel information	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	3
Communicated their understanding of the client's needs and explained how they will assist them	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	3
Category Comment:							
Call Handling	Excellent	Good	Average	Fair	Poor	N/A	7
Maintained control of the call and the call flow	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>		3
Addressed client questions, provided appropriate response	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	4
Properly handled difficult situations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Overcomes objections	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	
Category Comment:							
Process Accuracy and Follow-Through	Excellent	Good	Average	Fair	Poor	N/A	10
Provided accurate and complete information to the client	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	4
Completed assigned forms and/or							

Remark By:

On: Save

Delete Print Download

The InTelegent Call Review Process



Provide Feedback

■ Where & When

- Within 24 hours of your review
- In a private room or office



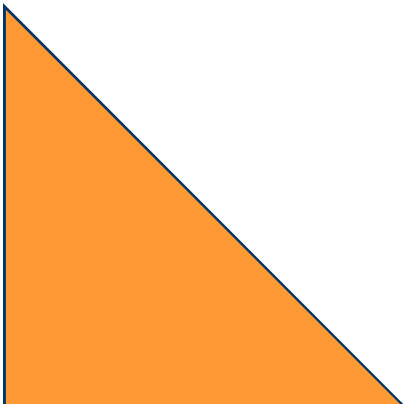
■ How

- With the call review form complete and printed
- With a positive attitude and specific feedback and recognition prepared ahead of time
- With CalWIN open to look up record if required



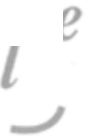
Call Review Form Examples

- **Call Review Form Examples**
 - Tulare County
 - San Francisco County
 - Santa Cruz County
 - Sonoma County



Technology Examples in Use

- **Typical Technology Options for Call Review**
 - Call Recording and playback- usually requires an additional module on your ACD system
 - Real Time Silent Monitoring- generally provided with most ACD systems
- **Example Technology Solutions in Use**
 - Verint (www.verint.com) Santa Cruz County BCC. Call recording and screen capture working with Siemens-Hi Path IP Phone system and CalWIN
 - Calabrio (www.calabrio.com) Tulare County Service Center. Call recording working with Cisco IP Phone system
 - San Francisco County uses Service Observe offered through Avaya for remote monitoring and a Tele-Recorder (purchased at Radio Shack) for individual call recording to allow EW self review



Best Practices in Call Review

- Strategically plan for your call review schedule and develop a call review action plan each month.
- Work as a team with your peers to help support one another through the process so that each of you can reach your goal
- Before you begin a call review session, prepare yourself both physically and mentally.
- Follow the five-step Call Review Process of: Listen, Assess, Document, Analyze and Coach.
- Focus on active listening and proactively work toward reducing and/or eliminating your common listening obstacles.
- Provide consistent, honest and specific recognition and feedback.
- Provide feedback in a timely manner so that the call is still fresh in your and the Phone EW's mind.
- When ready to coach and employee, put yourself in their position and focus on maintaining their self-esteem.