

QA Team Role Analysis & Implementation

Overview

- 10-15 evaluations per agent per week
 - An equal mix of email tickets and phone calls
- 9 FTEs
 - Title: Call Quality Specialist
 - Starting with 5 FTEs
- 1 Lead
 - Title: Supervisor, Quality Assurance
- Includes Tier 1, Tier 2, and Outbound teams for Phase I
- Scorecards optimized during Phase I

FTE Determination

- Estimated time to monitor **and** evaluate a call (Tier 1, Tier 2, Outbound): ~12 minutes (5 evaluations per hour to start)
- 111 FTEs @ 10-15 evaluations/week = 4,400-6,000 evaluations/month
- 4,400-6,000 evaluations multiplied by 12 minutes = ~900-1,300 hours of work/month
- 1 Call Quality Specialist = ~125 hours/month (~80% of 160 available working hours. See “Task Breakdown” section below)
- Total required FTEs: 9 (average from range of 8-10 FTEs required)

Role Description

The Call Center Quality Specialist will be responsible for analyzing patient interactions with our Tier 1, Tier 2, and Outbound teams. The Call Center Quality Specialist will monitor inbound and outbound calls and emails (tickets) to assess agents' demeanor, technical accuracy, soft skills, and adherence to government and company policies and procedures. Additionally, they may lead calibration sessions.

Role Requirements

- Proficient in their current role with a desire to constantly improve
- Excellent verbal and written communication skills
- Exceptional listening and analytical skills
- Quick learner and flexible to process and policy changes
- Must be a self-starter and self-motivator with solid time management skills
- Rigorous attention to detail
- Positive demeanor and a willingness to help

Task Breakdown

- Monitoring and Evaluating Calls / Tickets: 80%
- Learning / Development / Staying up to date: 15%
- Attending calibration sessions: 5%

Performance Measurements

- Productivity: Measured daily / weekly / monthly. 5+ calls per hour on average.
Goal: >90%
- Calibration Variance: Difference between their score and a calibrated score
 - Quality Supervisor monitors 15-20 calls per Call Quality Specialist per month and measures difference in their score vs. the Call Quality Specialist's score
 - Measured monthly
 - Call Quality Specialist score must be within 5% of the Supervisor's score
 - Supervisor is able to document and discuss comments about subjective questions. EX: An agent *should* have recommended a copy of the lab report for travel, but the QA Specialist did not leave that feedback on the evaluation.

Interview Questions

- Tell me how you set and achieve performance goals
- Tell me about a time you found a mistake in your work. How did you find it?
What did you do to prevent the same mistake going forward?
- Give us an example of a project or task you worked on that required above-average attention to detail
- How do you stay motivated in an environment that may be perceived as monotonous?
- What does "a high-quality experience" mean to you?
- What makes feedback constructive?
- In your own words, why is it important to have a call quality team?

Initial Training

- Uptraining to Tier 2 (for agents promoted from Tier 1)
- Role-specific non-systems training
 - Quality mindset
 - Professionalism
 - Documenting feedback appropriately
 - Interacting with multiple levels of a business (from front-line employees to executives)
- System training
 - Google Sheets / GSuite (for future QA tracking document)
 - QM features within InContact / RingCentral
 - Windows Media Player (potentially)

Dependencies / Challenges

- Salary research to obtain proper ranges
- Approval to hire / interview
- Additional system access requirements
- Sifting through applications to find candidates that are a good fit

Implementation Phases

- **Phase I**
 - Optimize quality monitoring forms
 - Ensure RingCentral's monitoring program is configured the way we want (categories, forms, etc.)
 - Move all call monitoring and evaluation into RingCentral
 - Revisit scoring methodology
 - What constitutes a passing score?
 - Implement an "automatic failure" system with rapid coaching requirements. For example, HIPAA violations or unprofessional behavior would need to be evaluated, reported, and coached within 24 hours. The agent automatically receives a failing score.
- **Phase II**
 - Create roles and responsibilities
 - Post, interview, and hire for Call Quality Specialist and Supervisor roles
 - At least two agents from Tier 2 (preferred)
 - At least two bilingual agents (required)
 - Onboard a Supervisor / Team Lead
 - Train new team members on systems/quality forms
 - Roll out the call calibration process:
 - 1 leadership calibration per month
 - 2 Quality team calibrations per month
 - As needed at the request of a team lead/supervisor, specific for their team
 - Participate in workshops, process changes, etc.
 - Help drive a culture where QA is perceived as an ally, not an enemy.
- **Phase III - Transition to Member Services**
 - Explore opportunities to include Sales Support and any other teams that impact patient care
 - Align Quality and Training departments under a Shared Services organization model separate from Operations
 - Seek opportunities to serve other departments with a need for quality assurance