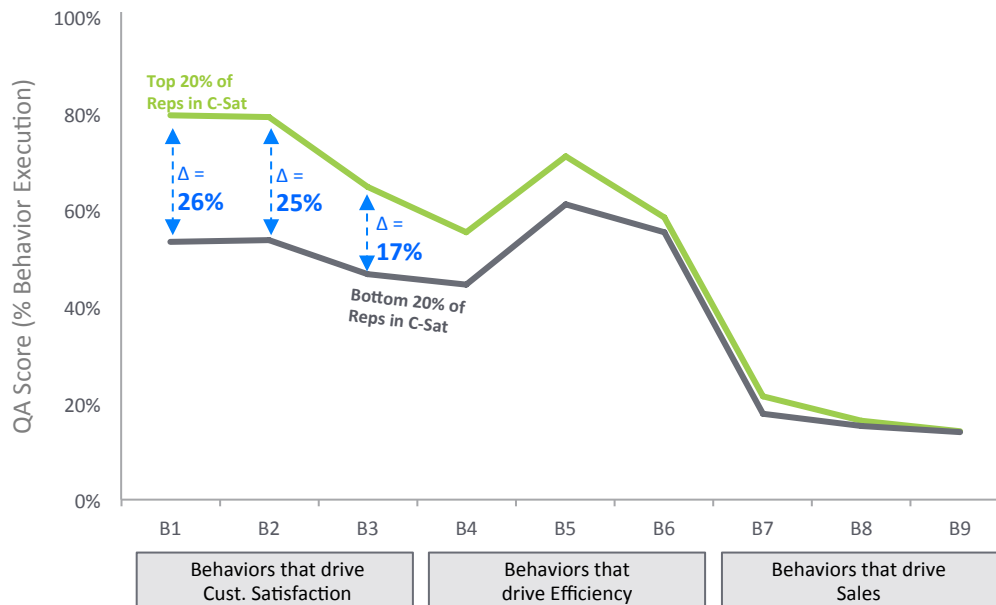


Current State: Does the QA function drive your objectives?

# Context: How Best-in-Class Organizations Measure the Relationship Between Behaviors and KPIs

## Best-in-Class Enterprise

Example: Customer Satisfaction vs. QA Behaviors



Where there *should* be a relationship between behaviors and KPIs, there is a **strong relationship**:

Top Quintile of performers (by KPI) perform:

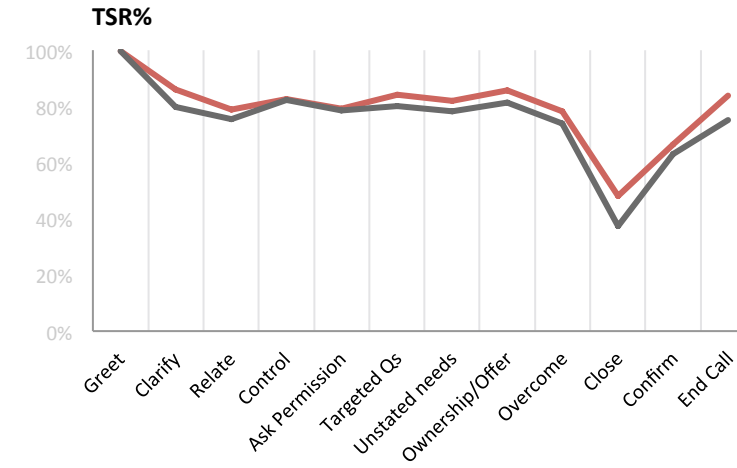
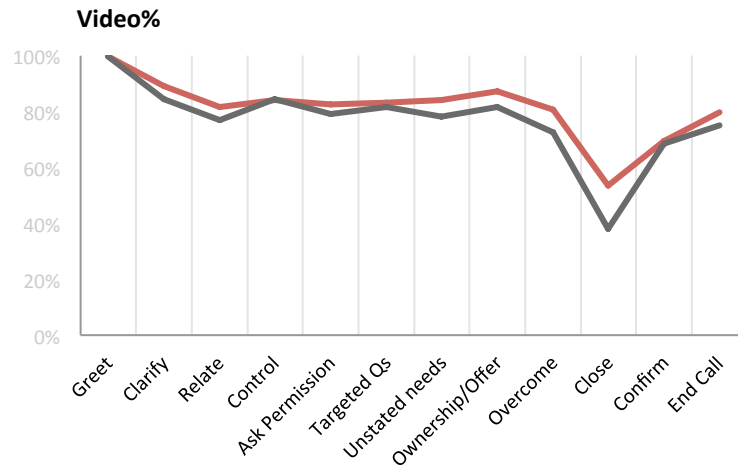
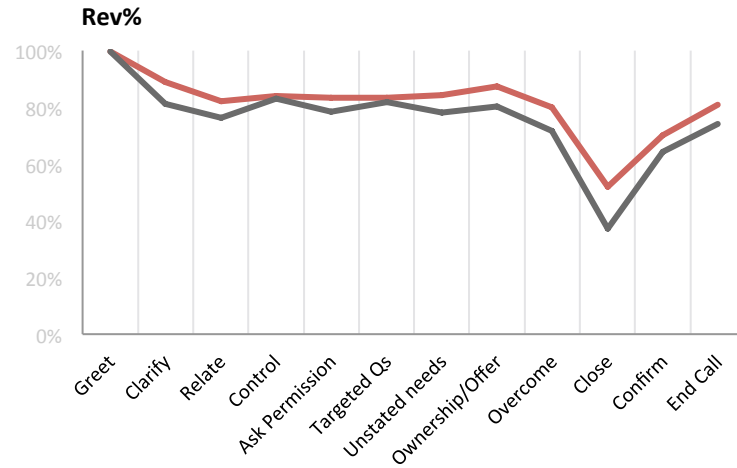
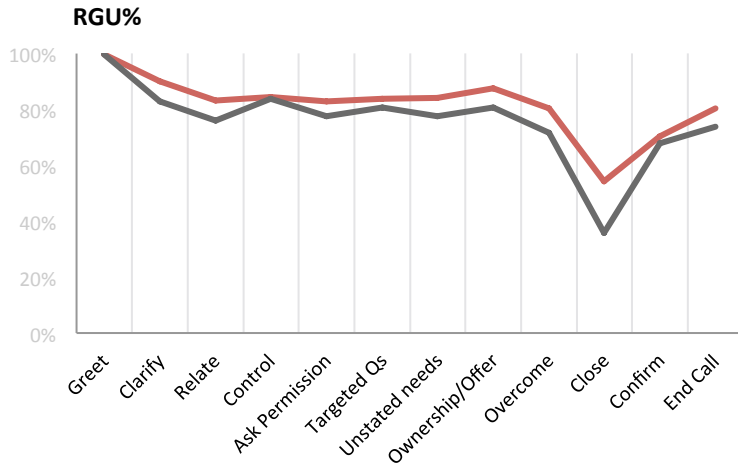
- 26 points better on Behavior 1
- 25 points better on Behavior 2
- 17 points better on Behavior 3

Current State: Does the QA function drive your objectives?

# Analysis of: Site 1

Weak Relationships; Average Delta = 5.1%

**Site 1**  
 — Top 20%  
 — Bottom 20%



# Evaluation of Site 1 Behavior Definitions

Site 1 Behaviors are broken into **dozens of discrete tasks, sub-behaviors, and requirements** in an effort to codify a fluid customer conversation into black-and-white terms.

Unintended Consequences: However, this often becomes a **checklist** that creates robotic reps. Reps become skilled at accomplishing the dozens of discrete tasks, but not necessarily delivering results.

## 13 Behaviors at Site 1      41+ Tasks or Requirements to Meet Expectations

- |   |   |
|---|---|
| 1. Greet the customer clearly                   | <b>6 tasks</b>  |
| 2. Clarify reason for call                      | <b>3 tasks</b>  |
| 3. Relate & empathize                           | <b>3</b>  |
| 4. Take control                                 | <b>5</b>  |
| 5. Set the agenda                               | <b>2</b>  |
| 6. Ask Targeted Questions                       | <b>3-6 (Highly Effective)</b>   |
| 7. Consider unstated needs/<br>Active listening | <b>3</b>  |
| 8. Take ownership /<br>Make offer               | <b>2-5 (Highly Effective)</b><br><b>+ 4-7 Sub-steps based on 7 call types</b> |
| 9. Overcome objections                          | <b>2-5 (Highly Effective)</b>   |
| 10. Close the save                              | <b>2</b>  |
| 11. Confirm details                             | <b>4</b><br><b>+ 2-12 Sub-steps based on call type</b>                        |
| 12. End on a positive note                      | <b>4-5</b>  |
| 13. Documentation                               | <b>2</b>  |

Meets Expectations	Below Expectations
<ul style="list-style-type: none"> <li>Used Active Listening Skills (listened for unstated needs or unstated reasons that prompted the call)</li> <li>Demonstrated observation of <b>at least one</b> unstated needs</li> <li>Redirect the agenda as required to keep the flow of the conversation</li> </ul>	<ul style="list-style-type: none"> <li>Did Not Meet Expectations</li> </ul>
<b>7 points</b>	<b>0 points</b>

Meets Expectations	Below Expectations
<p><b>Offer Additional Assistance (Must come first)</b></p> <ul style="list-style-type: none"> <li>Offered additional assistance</li> <li>For contacts where the issue remains unresolved:                             <ul style="list-style-type: none"> <li>Apologized for the inconvenience and made an offer of additional assistance</li> </ul> </li> </ul> <p><b>Close: Thank Customer &amp; Branded Close</b></p> <ul style="list-style-type: none"> <li>If disconnect order not placed, thanked customer for their loyalty.</li> <li>Closing included your name and a positive statement</li> <li>WOC statement</li> </ul> <p><b>TRANSFERS - Used proper transfer courtesies</b></p> <ul style="list-style-type: none"> <li>Transfer - Advised customer who he/she is being transferred to and explain why a transfer is necessary. (wait for response from customer ...)</li> </ul>	<ul style="list-style-type: none"> <li>Did Not Meet Expectations for:                             <ul style="list-style-type: none"> <li>Offer Assistance AND</li> <li>Close: Thank Customer &amp; Branded Close</li> </ul> </li> </ul> <p><b>TRANSFERS - Used proper transfer courtesies</b></p> <ul style="list-style-type: none"> <li>Did Not Meet Expectations</li> </ul>
<b>4 points</b>	<b>0 points</b>