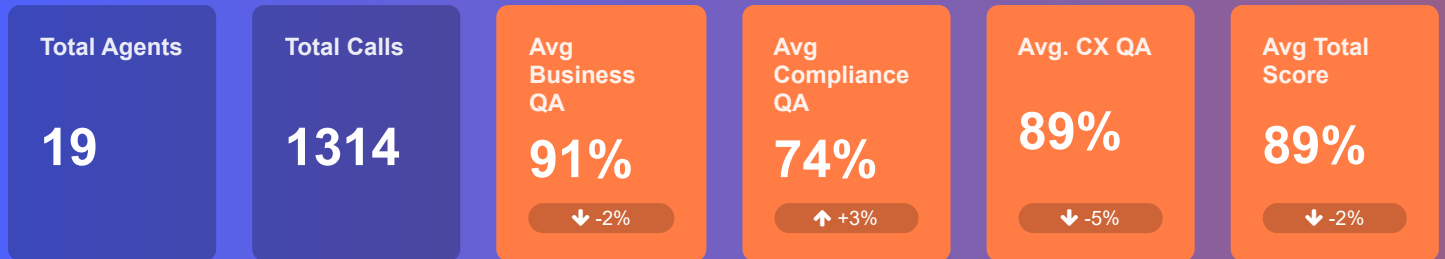
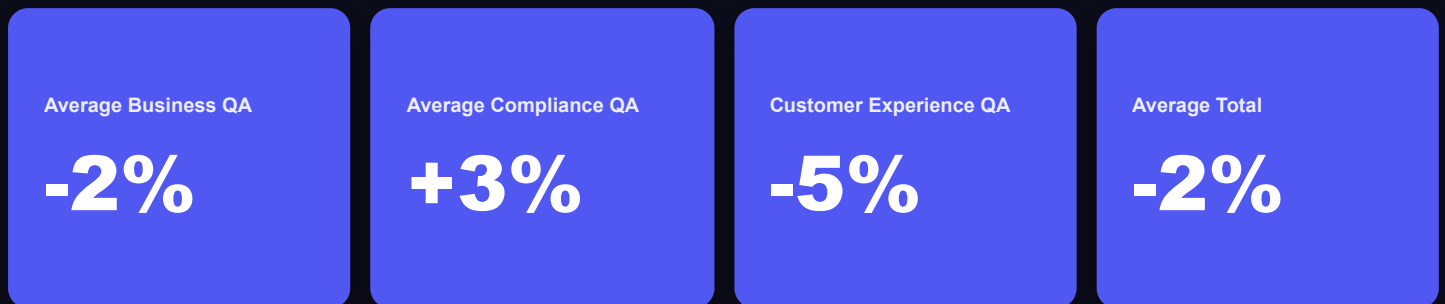


Month: **Aug 2024**

EXECUTIVE SUMMARY



Performance Trend



Summary

This month's performance across customer support teams reflects a mixed landscape with a slight overall decline in total QA scores (-2%), driven primarily by decreases in Business QA (-2%) and Customer Experience QA (-5%), despite a modest improvement in Compliance QA (+3%). The organization maintains strong average scores in Business QA (91%) and Customer Experience QA (89%), indicating consistent professionalism and customer rapport. However, the Compliance QA average remains a concern at 74%, highlighting ongoing risks in verification and regulatory adherence. Team A and Team B continue to lead with equal total scores (90%), showing stability but no significant month-over-month gains. Emerging risks center on inconsistent caller verification and empathy gaps during complex or complaint-related calls. These trends underscore the need for targeted coaching and process reinforcement to sustain quality improvements and mitigate compliance risks.

Team Performance Stats

Team A and Team B are neck-and-neck, both achieving a 90% total score with strong Business QA (92%) and Customer Experience QA (92% and 91%, respectively). Team B slightly outperforms in Compliance QA (76% vs. 75%). Neither team showed month-over-month score changes, but Team A improved its ranking by one position, while Team B dropped by one. No major shifts were observed, indicating stable but plateaued performance. Compliance QA remains the weakest link for both teams, suggesting a shared area for focused improvement.

Team	Rank	Total Calls	Business QA %	Compliance QA %	Customer Exp. QA %	Total Score %	Trend	Rank Change
Team A	1	690	92%	75%	92%	90%	0	+1
Team B	2	624	92%	76%	91%	90%	0	-1

Best Agents Comment

- Top agents consistently demonstrate strong empathy, active listening, and clear communication, which drive higher Customer Experience QA scores and foster positive customer interactions.
- They maintain high compliance adherence, particularly in caller verification and call closure protocols, contributing to improved regulatory alignment and reduced business risk.
- These agents exhibit confidence and efficiency in call flow management, enabling effective handling of complex inquiries and ensuring call resolution clarity.
- Their behaviors positively influence team culture by setting performance benchmarks and providing models for coaching and peer learning.

Worst Agents Comment

N/A

Strengths

Consistent professionalism in greetings and call closures across teams enhances customer trust and satisfaction.

Strong active listening skills and empathy contribute to positive customer rapport and higher CX QA scores.

High adherence to Business QA standards reflects effective call handling and operational knowledge.

Clear communication with avoidance of jargon supports customer understanding and reduces call escalations.

Efficient call flow management enables timely resolution and improved agent confidence.

Areas for Improvement

Inconsistent caller verification compliance remains a critical risk area, requiring immediate attention to prevent regulatory breaches.

Empathy and rapport building show variability, especially in complaint and dispute calls, impacting customer satisfaction.

Summarization and confirmation of next steps are often missed or unclear, leading to unresolved issues and repeat contacts.

Handling of complex claims and cancellation calls needs enhanced training to improve agent confidence and call outcomes.

Communication clarity under technical or policy complexity requires reinforcement to avoid misunderstandings.

HIGH-SCORING TOPICS

Billing & Payments

Policy Management (non-cancellation related)

Claim Status Update

Lodge a New Claim

Submit/Request Claim Documentation

LOW-SCORING TOPICS

Dispute Claim Outcome

Complaint About Claim

Policy Cancellation

Claims & Incidents with Technical Issues

Complaints & Risk Management

Coaching Focus

Skill Area	Action
Caller Verification Compliance, Summarization & Next Steps Communication	<ul style="list-style-type: none">• Implement centralized QA refresher sessions emphasizing verification protocols and effective call closure techniques.• Conduct role-play workshops simulating complex claims and complaint scenarios to practice clear summarization and compliance adherence.
Empathy & Rapport Building, Handling Complex and Complaint-Related Calls	<ul style="list-style-type: none">• Deliver targeted empathy training focusing on de-escalation and emotional intelligence in challenging interactions.• Establish peer coaching and call review sessions to reinforce best practices in managing disputes and sensitive topics.

Recommendations

- Scale best practices from top-performing agents by formalizing mentorship programs and sharing success behaviors organization-wide.
- Close compliance gaps through mandatory verification training, enhanced monitoring, and real-time feedback mechanisms.
- Standardize call summarization protocols to ensure consistent confirmation of next steps and reduce repeat contacts.
- Invest in specialized coaching for complex call handling, focusing on empathy, communication clarity, and call flow efficiency.

Summary

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