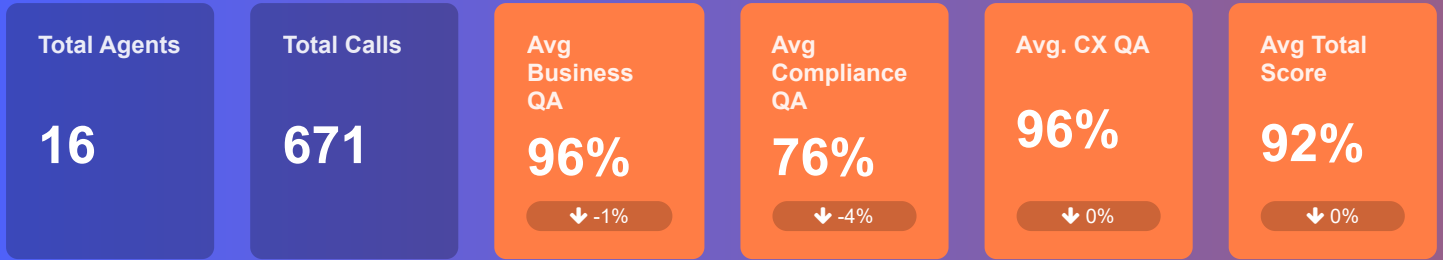
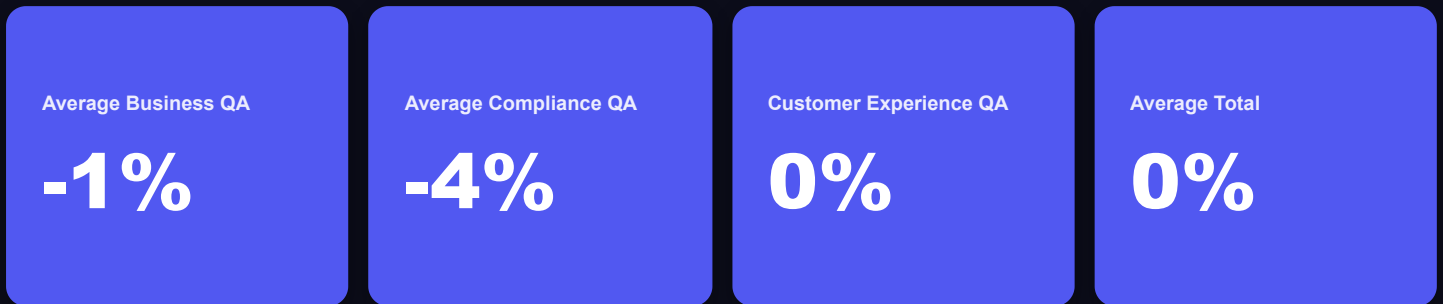


Month: **Mar 2026**

EXECUTIVE SUMMARY



Performance Trend



Summary

This month's performance across customer support teams reflects a stable overall quality with a total average score holding steady at 92%. While Business QA and Customer Experience QA remain strong at 96%, Compliance QA has declined by 4%, signaling emerging risks in adherence to regulatory and verification standards. Team B has improved its ranking and performance, particularly in Compliance QA, while Team A shows slight declines. The consistency in high Business QA and CX QA scores indicates strong professionalism and customer rapport, but the dip in compliance highlights systemic gaps that could expose the business to operational risks. Leadership should prioritize closing these compliance gaps to sustain quality and mitigate risk. The top-performing agents demonstrate exemplary empathy, compliance adherence, and communication clarity, positively influencing team culture and customer satisfaction. Conversely, lower-performing agents exhibit recurring challenges in caller verification and summarization, underscoring the need for targeted coaching. Overall, the organization maintains solid customer experience standards but must address compliance weaknesses to ensure sustainable improvement and risk mitigation.

Team Performance Stats

Team B leads the organization with the highest overall Total Score at 93%, excelling in Business QA (97%) and Compliance QA (79%), showing a positive trend with a +1% improvement and a rise in ranking. Team A, while handling a similar call volume, trails slightly with a 91% Total Score and a Compliance QA of 76%, also improving by +1% but dropping one rank. Both teams maintain strong Customer Experience QA scores (Team B at 96%, Team A at 94%). The notable month-over-month improvement in Compliance QA for Team B contrasts with the overall organizational decline, suggesting effective localized interventions. However, the slight decline in Business QA (-1%) and Compliance QA (-4%) across the board indicates areas requiring attention to prevent further erosion.

Team	Rank	Total Calls	Business QA %	Compliance QA %	Customer Exp. QA %	Total Score %	Trend	Rank Change
Team B	1	334	97%	79%	96%	93%	+1	+1
Team A	2	337	95%	76%	94%	91%	+1	-1

Best Agents Comment

- Top agents consistently demonstrate strong compliance adherence, particularly in caller verification, which directly supports higher Compliance QA scores and reduces business risk.
- They exhibit exceptional empathy and rapport-building skills, fostering positive customer experiences that elevate Customer Experience QA metrics.
- Clear, jargon-free communication and efficient call flow management are common traits, enabling effective resolution and customer satisfaction.
- These agents serve as role models for professionalism and confidence, positively influencing team culture and providing benchmarks for peer development.

Low Performing Agents Comment

- Lower-performing agents frequently miss critical compliance steps, especially in caller verification, contributing to the overall decline in Compliance QA scores.
- Inconsistent summarization and call closure practices lead to unclear next steps, impacting customer satisfaction and operational efficiency.
- Communication challenges, including lapses in empathy and rapport during complex or high-stress calls, reduce effectiveness and increase risk.
- These gaps present clear coaching opportunities focused on compliance rigor, communication clarity, and emotional intelligence to uplift performance sustainably.

Strengths

Consistent professionalism and courteous call handling across teams, reflected in high Business QA and Customer Experience QA scores.

Strong active listening and communication clarity, enabling efficient call flow and positive customer interactions.

High levels of confidence and call handling efficiency among top agents, supporting overall operational effectiveness.

Effective call closure and summarization in many cases, ensuring customer understanding and satisfaction.

Demonstrated ability to handle complex claim and policy-related topics with competence and empathy.

Areas for Improvement

Compliance QA shows a significant decline, primarily due to inconsistent caller verification practices across agents and teams.

Summarization and confirmation of next steps are frequently missed, leading to potential customer confusion and follow-up inefficiencies.

Empathy and rapport building require reinforcement, especially in sensitive or dispute-related calls.

Communication clarity under technical disruptions or complex scenarios needs improvement to maintain call quality.

Standardization of compliance protocols and verification steps is necessary to reduce variability and business risk.

HIGH-SCORING TOPICS

Claim Status Update

Lodge a New Claim

Submit/Request Claim Documentation

Policy Renewal Request

Billing & Payments - Payment Setup or Change

LOW-SCORING TOPICS

Complaints & Risk Management

Policy Cancellation

Dispute Claim Outcome

Security and Fraud Awareness

Legal or Compliance Concern

Coaching Focus

Skill Area	Action
Caller Verification Compliance, Regulatory Adherence	<ul style="list-style-type: none">• Implement centralized QA refresher sessions emphasizing verification protocols and compliance standards.• Conduct role-play workshops simulating complex verification scenarios to reinforce best practices.
Empathy & Rapport Building, Communication Clarity	<ul style="list-style-type: none">• Deliver targeted empathy training focusing on handling sensitive and dispute-related calls.• Review recorded calls with agents to identify communication gaps and practice clear, jargon-free dialogue.
Call Closure & Summarization, Confidence & Efficiency	<ul style="list-style-type: none">• Facilitate paired coaching sessions to improve summarization techniques and confirm next steps.• Provide workshops on confidence-building and efficient call handling under challenging conditions.

Recommendations

- Scale best practices from top-performing agents by establishing peer mentoring and knowledge-sharing programs.
- Prioritize closing compliance gaps through mandatory training and enhanced monitoring of caller verification processes.
- Standardize call closure and summarization protocols to ensure consistent customer experience and operational clarity.

- Invest in empathy and communication skills development to improve handling of complex, sensitive, and dispute-related calls.

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