

## CASE STUDY

### CUSTOMER PROFILE:

Financial Services, Stock Transfer Agency

### WEBSITE:

[www.computershare.com](http://www.computershare.com)

### LOCATION:

Canton, MA; Chicago, IL; Edison, NJ

### BUSINESS NEED:

Computershare wanted to improve customer satisfaction and agent empowerment by:

- Increasing evaluator and agent confidence in overall quality program
- Performing a clearer and more holistic skill evaluation for accurately gauging improvements
- Establishing a 'Coach and Mentor' system

### NICE SMARTCENTER SOLUTIONS:

- NICE Quality Management
- NICE Interaction Recording

### THE IMPACT:

- Improvements in agent morale and supervisor confidence in evaluation system
- Accurate detection of areas for improvement in quality management processes
- Enhanced quality of service
- High customer satisfaction scores between 3-7% above the industry average

## On the NICE Solution

"Prior to the NICE Quality Management implementation and changes to our quality assurance program, our average client satisfaction survey results ranged within the 80–89% range. We now consistently exceed industry customer satisfaction ratings month to month well into the 90+%. Since we implemented NICE Quality Management and the modifications we made with this system, we are exceeding the industry results by between 3%-7%."

*Robert Cahill, Quality Manager*



## Enhancing Quality of Service and Employee Satisfaction in a Multi-Site Environment with NICE Quality Management

### About Computershare

Computershare is a global market leader in transfer agency and share registration, employee equity plans, proxy solicitation and stakeholder communications. The company is renowned for its expertise in data management, high volume transaction processing, payments and stakeholder engagement. Computershare also specializes in corporate trust services, tax voucher solutions, bankruptcy administration and a range of other diversified financial and governance services. Represented in all major financial markets, Computershare has over 10,000 employees worldwide.

### The Challenge

Computershare wanted to improve the overall quality of service to their customers and agents handling the calls. To achieve their goal, Computershare needed to focus on several areas. Firstly, it was important to increase evaluator and agent confidence in their overall Quality Evaluation Program. Secondly, they had to accurately identify the quality and level of improvement process. Finally, it was essential to move towards a Coach and Mentor ideal of quality.

If they could meet their objectives by addressing these areas of development, Computershare felt they could boost overall agent morale, retention and career development. They would be able to improve feedback with increased accuracy and consistency which would further increase agent confidence in the quality program itself. It would also show agents that the company is committed to their success and overall improvement in service and not simply looking for what they had done wrong.

Computershare wanted to create a close, positive collaboration between the company and its agents which would ultimately translate into improved customer service and customer satisfaction.



## The Solution

Prior to deploying NICE Interaction Recording and Quality Management in early 2008, Computershare evaluated agent performance with different evaluation forms at each of their sites resulting in a lack of standardization in their quality monitoring process. After implementing the NICE solutions, they began evaluating their staff with a single evaluation form and process for more accurate quality monitoring. Over time, however, the contact centers' business requirements evolved and they discovered a decline in agent confidence in the consistency of quality evaluations as well as the ability for the agent and evaluators to accurately track improvement. Agents, supervisors and Quality Coaches experienced confusion in how to evaluate the more gray areas or soft skill areas of calls. The evaluation forms were lengthy and contained redundant skills resulting in 'double dipping' of scoring certain call types. They also allowed for only two evaluation options to a skill (either 'yes' or 'no') which resulted in inconsistent scoring for areas that had less of a direct impact on the upfront service provided as well as the soft skill areas of the call.

Robert Cahill, Quality Manager at Computershare, explained, "We reached a point in our overall Quality Evaluation Program where we needed to proceed to the next level of customer service. We wanted to implement a program that promoted quality as a motivator for improvement and recognized agents as a group." Cahill continued, "The program was designed to be for the agents to assist them in following their progress and successes in their quality of service. The goal was to move away from the 'Big Brother' ideal of quality and a Quality Team."

Computershare began to address these matters by trying to shift from just objective measuring and wanted to add clearer inclusion of subjective measuring, where applicable. They needed to get into the gray areas of a call, where things may have been handled reasonably, but needed a bit of coaching on skills such as tone, empathy and other soft skills. Although they knew that these still required evaluation and feedback for improvement processes, in some cases, they did not want to fully mark on the evaluation form how the agent handled a situation as being completely incorrect or, vice versa, completely correct. These areas tended to be marked as either 'yes' or 'no' without clear tracking or direction for improvement and had the potential to only end up as being verbally 'coached back' to the agent.

Rather than no score at all or provide false scoring by marking as correct, they added a three tiered scoring (Demonstrated, Developing or Did Not Do At All) which seemed to be a more effective method to provide positive feedback to areas that required more developmental scoring for the skill that was not handled completely. This allowed for tracking and trending these development areas against instances

where the skill was either handled perfectly or completely missed. It ultimately provided a more accurate representation of the agent's service quality and presented the agent with a more meaningful evaluation without harsh scoring, false scoring or 'coach backs' that cannot be quantifiably tracked for improvement.

The NICE Quality Management solution enabled Computershare to implement these major multi-site changes to their quality evaluation program within a few months. They were able to develop, test and adjust evaluation forms using the Form Designer with the inclusion of testers from each location working from the same form/information. In addition, they identified pilot testing groups and used NICE Quality Management to track and trend the differences between the old and new evaluation process and quickly make changes to the new process. The pilot teams easily identified, evaluated and consistently reported from each site location within the NICE solution.

To improve targeted reporting of focus areas and understand the depth of specific training or development required, Computershare used NICE Reporter to generate reports and view trends. They were able to determine which activities were not performed correctly and the type of skills agents had to hone.

When they were ready for deployment, Computershare was able to go live simultaneously in all their U.S. locations without delay. By running a single consistent NICE platform, they easily implemented the changes across the multiple locations. They were also able to simply disable old evaluation forms to ensure that there was no chance of incorrect form usage or discrepancies in overall evaluation results and feedback delivered.

To evaluate the impact of the changes to the Quality Evaluation Program, Computershare conducted a survey amongst its agents. By perfecting the way feedback was delivered and improving trending and quality tracking of staff improvement, Computershare agents provided extremely positive feedback about the changes and were able to significantly improve their quality of service. As a result of the new evaluation forms, 91% of the agents felt that the new form helped them understand how to improve the service they provide. 98% of the staff felt they understood what the skills on the form encompassed.

With the enhancements to the quality evaluation process, Computershare was also able to increase its customer satisfaction. According to Cahill, "Prior to the NICE Quality Management implementation and changes to our quality assurance program, our average client survey results ranged within the 80-89% range. We now consistently exceed industry customer satisfaction ratings month-to-month well into the 90+%. Since we implemented NICE Quality Management and the changes we made with this system, we are exceeding the industry results by between 3% - 7%."

## ABOUT NICE SYSTEMS INC.

NICE Systems (NASDAQ: NICE), is the worldwide leader of intent-based solutions that capture and analyze interactions and transactions, realize intent, and extract and leverage insights to deliver impact in real time.

Driven by cross-channel and multi-sensor analytics, NICE solutions enable organizations to improve business performance, increase operational efficiency, prevent financial crime, ensure compliance, and enhance safety and security.

NICE serves over 25,000 organizations in the enterprise and security sectors, representing a variety of sizes and industries in more than 150 countries, and including over 80 of the Fortune 100 companies. [www.nice.com](http://www.nice.com).

