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# Enhance Your QA Program with Customer Insights



Customer service and support leaders invest heavily in quality assurance (QA) programs that capture rep performance data, but only a few executives find value in the resulting insights. Use this research to understand why you should shift from a rep-focused QA program to a strategic customer experience (CX) and voice of the customer (VoC) insights program.

# Overview

## Key Findings

- In a survey of customer service and support leaders with responsibility over QA practices, 52% of leaders who rate their QA program highly valuable to their service organization say it is primarily because of VoC/CX insights. Only 19% say rep performance insights are the main reason for their QA program's high value to the organization.<sup>1</sup> With the objective of QA being a rep performance evaluation program, the most valuable QA outcome and the QA objective don't align.
- Service Leaders devote resources and investment to improving their QA ability to capture and evaluate reps through automation, revised evaluation forms and monitoring processes. However, Gartner research shows that only 13% of service leaders who said their QA program was of high value to their enterprise said it was mainly because of rep performance insights, leading to a disconnect with the tactical purpose of QA and lack of strategic insights valued by the enterprise.<sup>1</sup>
- QA programs focus their rep evaluation efforts on live channels, especially phone channels, which is misaligned with the realities of customers using multiple and digital channels. As a result, a lot of untapped quality data is left that could provide strategic insights regarding the customer journey.

## Recommendations

- Evolve the scope of service's QA program by shifting the priority from measuring individual rep performance to the capture of CX and VoC insights.
- Expand what is collected with a quality program by incorporating the three components of a quality intelligence (QI) program: VoC data, CX data and QA data.
- Get buy-in for a shift from QA to QI by convincing service leaders of the wealth of untapped strategic data a QI program can capture. This will help them to think outside of the established norm and the value of going beyond a rep evaluation focused program.

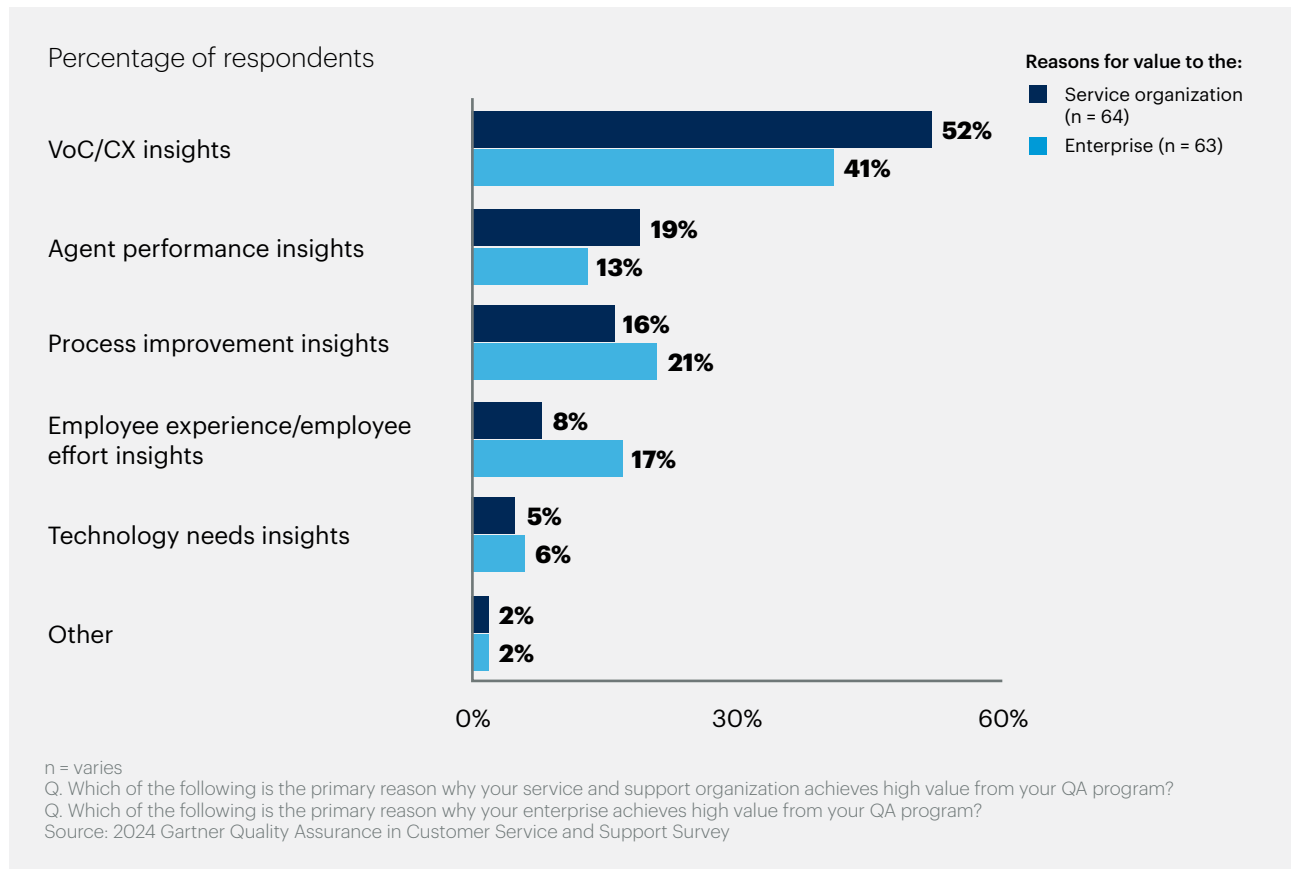
As the quality program name states, the purpose of QA for decades has been to provide assurance to service leaders that individual reps are achieving the quality standards that are required of them during their customer interactions. Gartner clients often ask some form of the question “How do we more effectively evaluate x% of rep calls each month?” when asking about improving their quality program. Achieving evaluation of a statistically significant sample of reps’ monthly interactions is virtually impossible. Also, the rep monitoring and evaluation that many organizations do today is time-intensive and expensive. Gartner research shows: <sup>1</sup>

- Eighty-five percent of leaders surveyed say they rely on at least some manual quality evaluations to conduct QA.
- Roughly three-quarters of service leaders surveyed describe their QA program as “high value” or “very high value” to the service and support organization and to their enterprise.
- Among those who named their QA program as a high value to their service organization or their enterprise, less than 20% each say the primary reason is because of agent performance insights.

**The value organizations glean from their quality program has little to do with the agent evaluations where so much time, energy and money is spent.**



The most cited value driver of organizations' quality program are VoC and CX insights.  
 Top Reasons Why the QA Function Is High Value to Customer Service and the Enterprise.



It is time for service leaders to recognize current QA programs are misaligned to its realized value. Service leaders must shift away from an individual rep performance focus to expanding the quality program's horizon and unleashing its potential to collect more valuable VoC and CX insights. This evolved quality program is what Gartner is calling QI, with the goal of improving quality by capturing VoC and CX intelligence on a broader scale. Instead of just focusing on QA results as an indicator of quality, QI incorporates VoC, CX, along with QA to provide broader, more holistic insights.

Use this research to change the motivation of your quality program from evaluating x% of individual rep interactions each month to identifying precise CX and VoC opportunities that drive impact for both the service organization and the enterprise.

**The best way to improve CX isn't through QA of the rep and the resulting coaching, but by identifying VoC and CX issues through a QI program that impacts CX and business outcomes across functions and channels.**

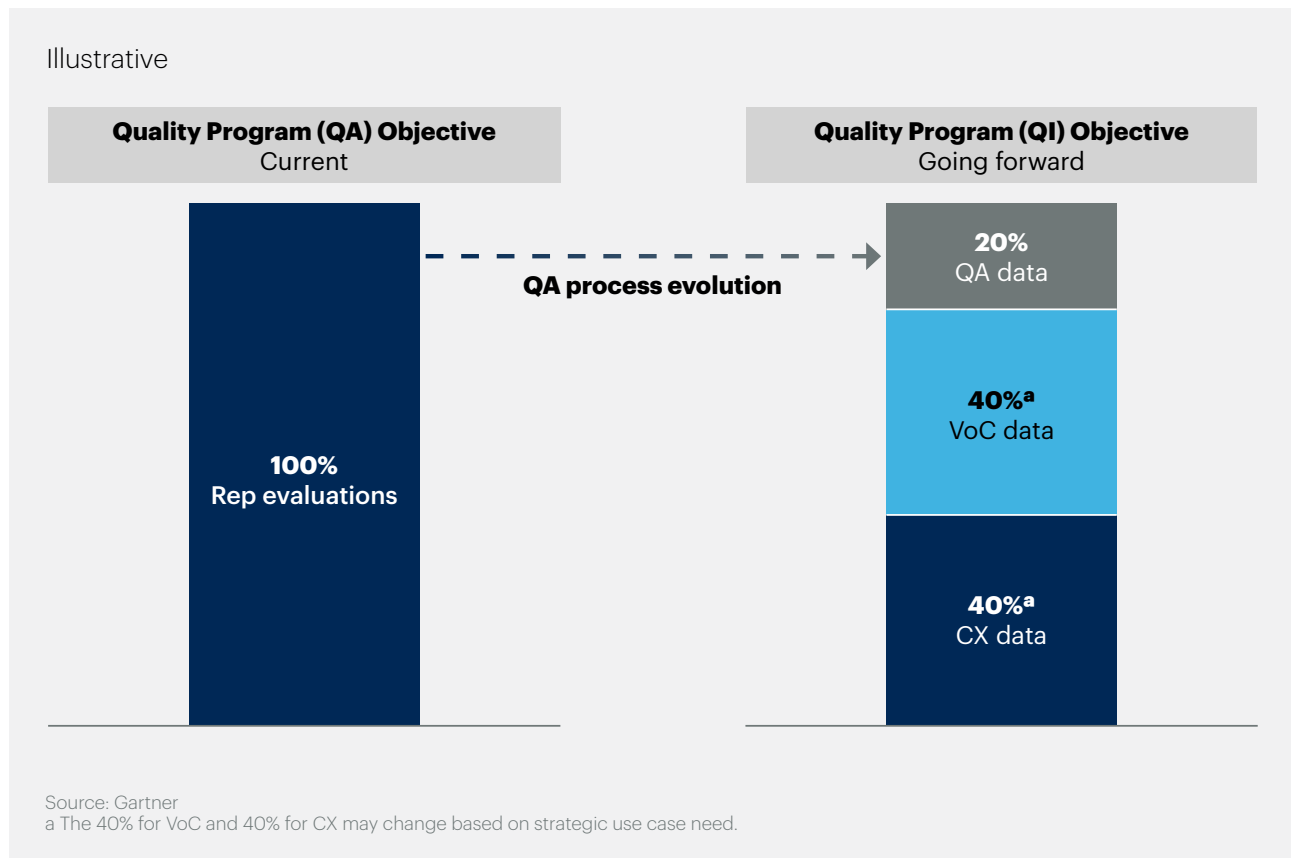
# Introduction

## Evolve to prioritize CX and VoC insights

The QA program of today doesn't lead to better CX and business outcomes. The data needed to impact those outcomes goes beyond individual rep performance results. To truly impact CX and the business, service leaders must evolve QA's objective to deprioritize capturing how individual reps perform during customer interactions, and prioritize the identification of CX and VoC insights, what service leaders and the Enterprise value most.

With QI, the traditional rep-focused QA process shifts from focusing 100% of activity on rep performance, to approximately 20% focused on rep performance — and only for specific rep groups. The remaining 80% of quality's efforts are divided between the capture of VoC and CX data, leading to the identification of more strategic insights (see Figure 2). The percentages of VoC and CX data captured as a part of an ongoing QI program will vary based on the strategic use case, organization needs and whether VoC or CX data brings more value for that use case.

**Figure 2: Comparing QA and QI**



# Expand what a quality program collects by incorporating the three components of a QI program

A QI function consists of capturing the following three components:

- 1. VoC data:** The capture of customer indirect feedback (what customers say to you or about you — unprompted) and inferred feedback (what customers are doing) to identify pain points in their journey that inhibit low-effort, value-driven service.
- 2. CX data:** The identification of obstacles and pain points that drive poor CX and increase customer service demand.
- 3. QA data:** The evaluation of a select group of reps based on improvement opportunity needs, along with an agile approach to quality that adjusts evaluation criteria based on business and CX needs.

A QI program looks broadly across the customer journey, going beyond listening for rep performance and capturing VoC and CX data that will lead to valuable insights and actions to impact CX and business objectives. See Table 1 for examples of VoC and CX QI data to capture.

**Table 1: VoC and CX Data to Capture During QI**

QI Data	Examples of What to Capture
VoC	<ul style="list-style-type: none"> <li>• Statements regarding failures or what the customer values most with digital or live assist channels</li> <li>• Frustrations with time to respond or resolve</li> <li>• Reasons for canceling or purchasing</li> <li>• Information regarding what customers prefer with your products/services compared to the competition</li> <li>• Information regarding what products/services customers wish you had because your competition offers them</li> <li>• Complaints regarding confusing communications or customer journey pain points</li> </ul>
CX	<ul style="list-style-type: none"> <li>• Repeated questions that can be moved to self-service</li> <li>• Information that can be provided through automation</li> <li>• Opportunities to proactively communicate</li> <li>• Additional training needed or knowledge base updates</li> <li>• Evidence of customer effort</li> <li>• Root cause of repeat calls</li> </ul>

Source: Gartner

Once VoC and CX data is captured, analysis and trending is done, enabling action to be taken. For example, VoC QI data provides insights that customers are frustrated with the company website's FAQ page because it is confusing and contains broken links. This insight regarding FAQ page failure enables service leaders to take action to correct the issues with site navigation, page display, and link accuracy. Continued QI observations validate that there is a decrease in VoC complaint data, along with reduced live assist volumes that are due to FAQ page issues. This validates that the actions improved CX (reduced customer effort) and business (reduced costly live assist volume) outcomes.

Also, VoC data can be used to focus QI efforts. For example, VoC could capture a group of phone interactions where the customer starts with a positive sentiment, then ends the interaction with a negative sentiment. Analytics is unable to identify the root cause. This insight would lead to QI efforts to target monitor those interactions to listen for the root cause. Is the negative shift in sentiment due to disappointment with company policy, failure with proactive communication, issues with rep knowledge? These QI efforts would lead to valuable CX insights that would drive actions to correct performance, leading to improved CX outcomes.

If you already have a VoC program that includes valuable direct, indirect or inferred data, that input will be combined with VoC and CX insights gleaned from the QI program. The result is that it will create an even more complete customer and CX picture. Make sure those responsible for the VoC program send the VoC data, including direct feedback from surveys or focus groups for examples, to QI analysts. This way, all VoC will be fed into the QI program to ensure it conducts the analysis holistically. The QI program analysts will decide what VoC data applies and incorporate that into the QI outputs to impact the strategic objectives.

If you don't have a VoC program, develop your QI strategy and invest in capturing VoC as a part of the QI process.

QA of individual rep performance plays a much smaller, but still important, role as a part of the service organization's evolved quality program. A New Way to QA: More Holistic Assessment of Service Reps focuses on helping service leaders evolve the QA component of their QI program to bring more value for the time spent conducting rep QA and collecting QA data.

## Get buy-in to shift to QI

Evolving a quality program begins with thinking outside of the established norm that the quality function's effectiveness is based on measures of individual rep performance. You must change your approach. Begin with the realization that a quality program focused on gathering strategic intelligence has much more value and potential impact, far exceeding the value of randomly monitoring "x" number of calls per rep per month.

To break this common belief that a quality program's primary objective is reviewing rep calls for performance and compliance, expand your view of the impact quality should have with these three acknowledgements:

1. A large amount of untapped strategic insight is available through customer service interactions, and implementing listening for QI uncovers that untapped insight.
2. Through capturing and sharing this untapped quality intelligence, strategic decision making and business outcomes will be impacted, creating the path for customer service to definitively demonstrate its value.
3. Much of this enterprise or cross-function insight captured through QI will directly and positively impact customer service, for example, with decreased live-assist volumes. Therefore, a QI program is a win/win for service and the enterprise bringing much needed strategic intelligence and value to both.

All three of these acknowledgements are interrelated and are critical for a quality program evolution.

To successfully get buy-in and achieve a mindset shift from QA to QI, it requires that leaders:

- Develop talking points to effectively explain the why, what and how, sustain it once implemented, and measure success using the recommendations in *How to Overcome Employee Resistance to Organizational Change*.
- Embrace and understand the change to QI, adopting a more strategic and holistic objective for a quality program.
- Deliver on expectations through capturing CX and VoC data by determining insights and tying the resulting actions derived from this QI process to CX and business outcomes.
- Communicate the achievements of the QI program to build advocacy and business justification to evolve.

Conduct a pilot of a QI program by selecting one customer-service-specific use case and data intelligence needs. Use the value achieved from that pilot to validate the value of the evolution of the current quality program to QI. By doing so, a quick win is achieved, the value of the shift to QI is realized, and quality analysts are helped with onboarding into their new role of QI analysts.

**Next Steps to Evolve QA to QI:** Now that you understand why QA should evolve and what QI is, see *How to Evolve QA Into a Strategic Quality Intelligence Program* for tactical next steps to implement your QI program.

# Evidence

This research is based on Gartner's 2024 Quality Assurance in Customer Service and Support Survey, vendor briefings with five QA platform vendors, as well as over 90 client inquiries over the past two years.

**12024 Gartner Quality Assurance in Customer Service and Support Survey.** This study was conducted to better understand quality assurance practices across service and support organizations, including how much organizations are automating QA and how QA insights are shared across teams. The survey was conducted online during March and April 2024 among 86 customer service and support leaders with responsibility over quality assurance practices. All respondents are from enterprises with at least US\$250 million in annual revenue. Disclaimer: Results of this study do not represent global findings or the market as a whole but reflect sentiment of the respondents and companies surveyed.



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