



Department of
Job and Family Services

Green Belt Six Sigma Project Report Out

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Ohio Department of Job & Family Services

December 9, 2013

CALL CENTER QUALITY MONITORING PROCESS

BACKGROUND

- Problem/Opportunity Statement
 - There are inconsistencies within the monitoring process which included inconsistent scoring among supervisors. The process is also very time-consuming, for the evaluation forms are outdated and instructions are unclear.
 - Causing morale issues and stress. Should be a learning tool but is almost seen as a punishment. Supervisors feel they are losing touch with staff as they spend so much time monitoring.

SCOPE OF PROJECT

- Beginning: Listening to a call. End point(s): Coaching, Quarterly evaluation and yearly review. This project is scoped at an actionable level.

Out of scope:

- Completely doing away with monitoring and this document.
- No contract or legislative changes.
- No IT solutions first.

PROJECT GOALS

Why do this project?

Objectives:

- To create and maintain a consistent evaluation process across all call centers.
- To update the scoring document.
- To save time.
- To improve morale.
- To identify common areas of deficiency and provide staff development.

What is the business impact of improving this process?

- Improving this process should positively impact 2 of the 5 evaluation goals for the CSR's. In addition, a good evaluation process will ensure CSRs complete their work properly and provide good customer service.

TEAM MEMBERS: TRAIL CHART

Stakeholders

- Valerie Remaklus
- Marge Benton
- Julie Smith

Kaizen Support

- Leader: Anita Jennings
- Data: Vivian Rice
- Co-facilitators:
 - Kathy Minehart,
 - Margo Canady-Johnson

Team

- Valerie Remaklus
- Sandy McGraw
- Caryn Barton
- Tim Simpson
- Lisa Jennings-Jones
- Eboni Stone
- Angie Martin

SMEs

- Michelle Reggins
- Charmy Crumley

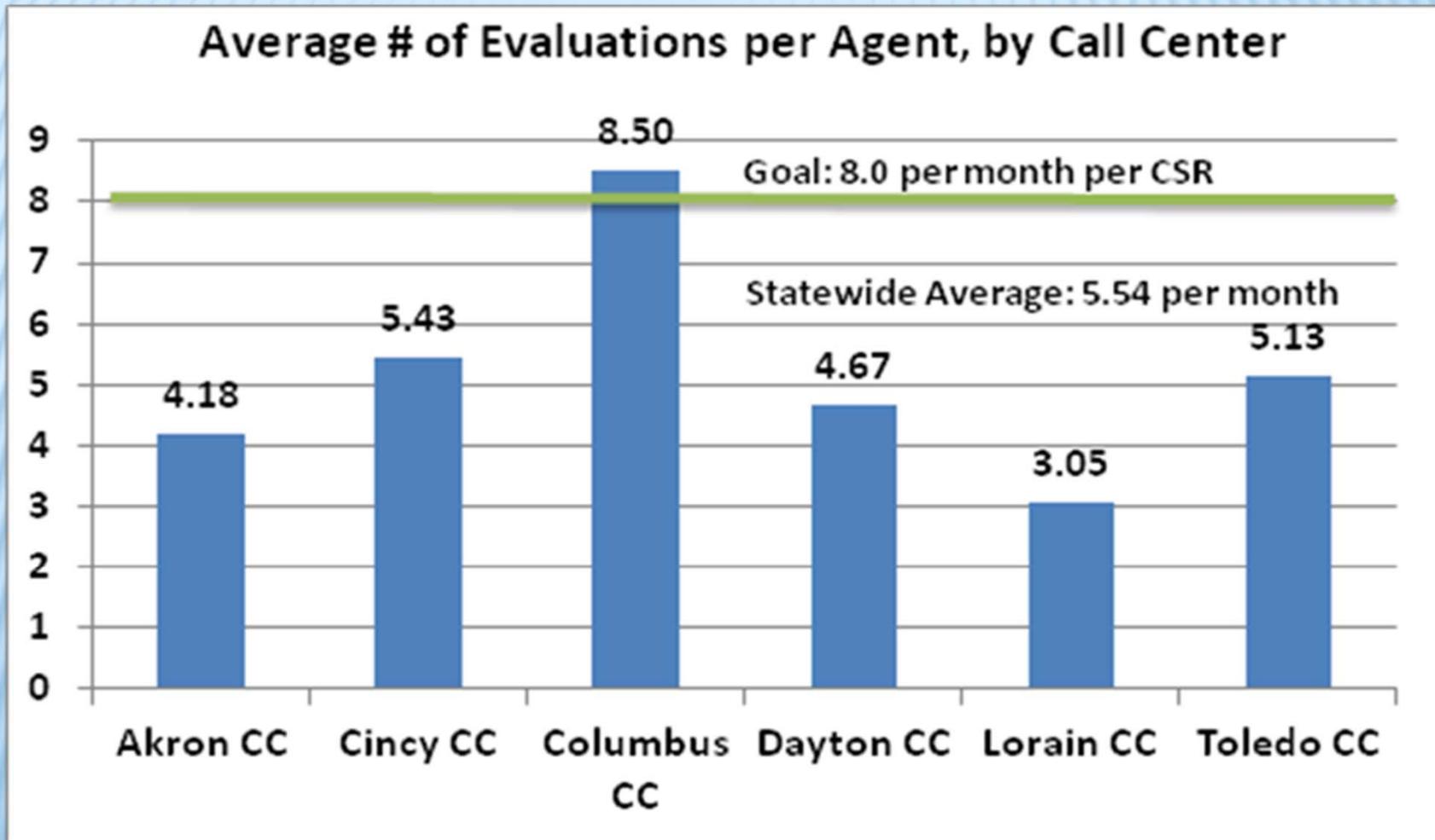
EBONI'S EVALUATORS



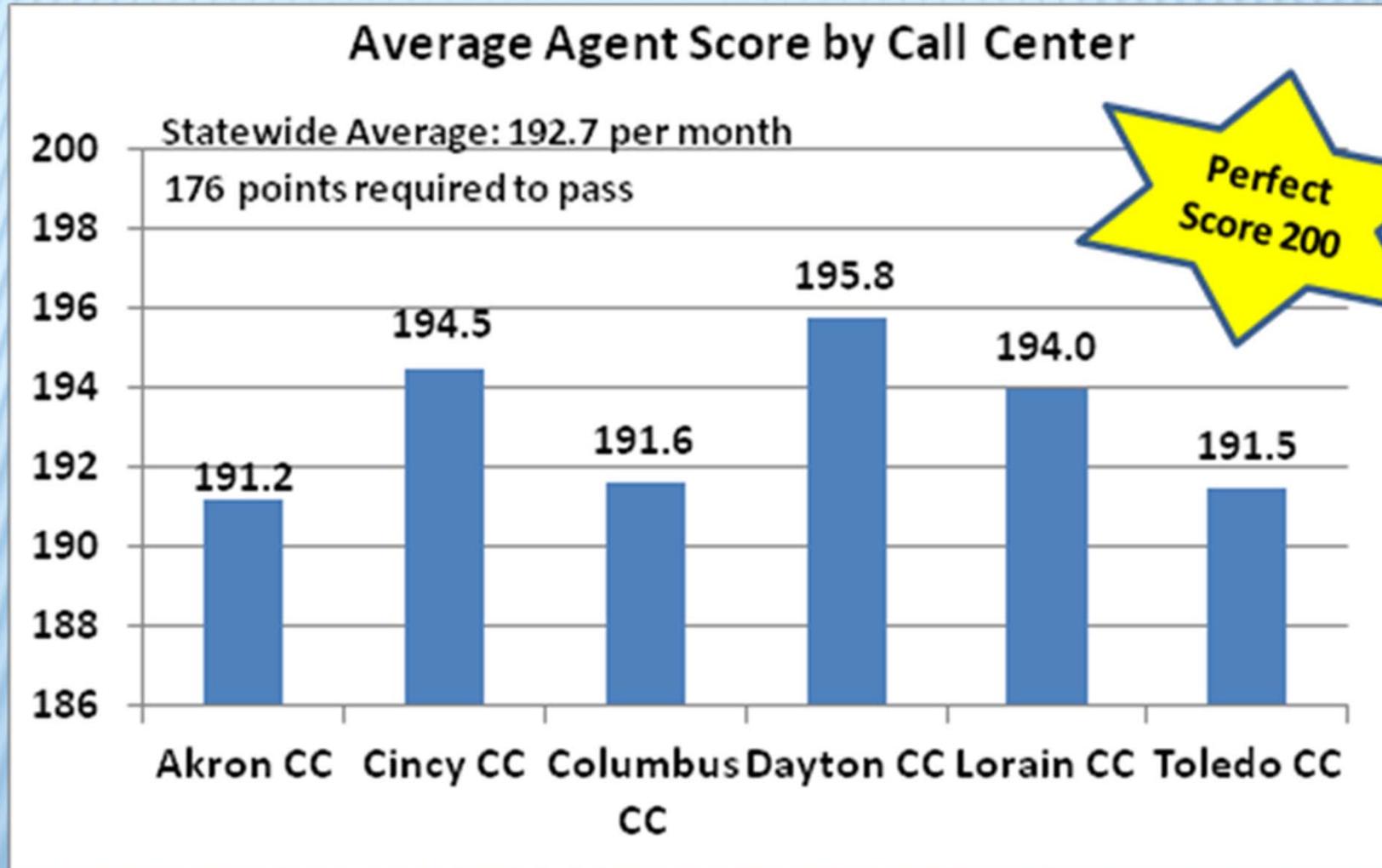
BASELINE DATA

Call Centers	# of Agents	# of Supervisors	# of Evaluations
Akron CC	17	2	71
Cincinnati CC	14	2	76
Columbus CC	34	4	289
Dayton CC	18	2	84
Lorain CC	19	2	58
Toledo CC	31	4	159
TOTAL	133	16	737

BASELINE DATA

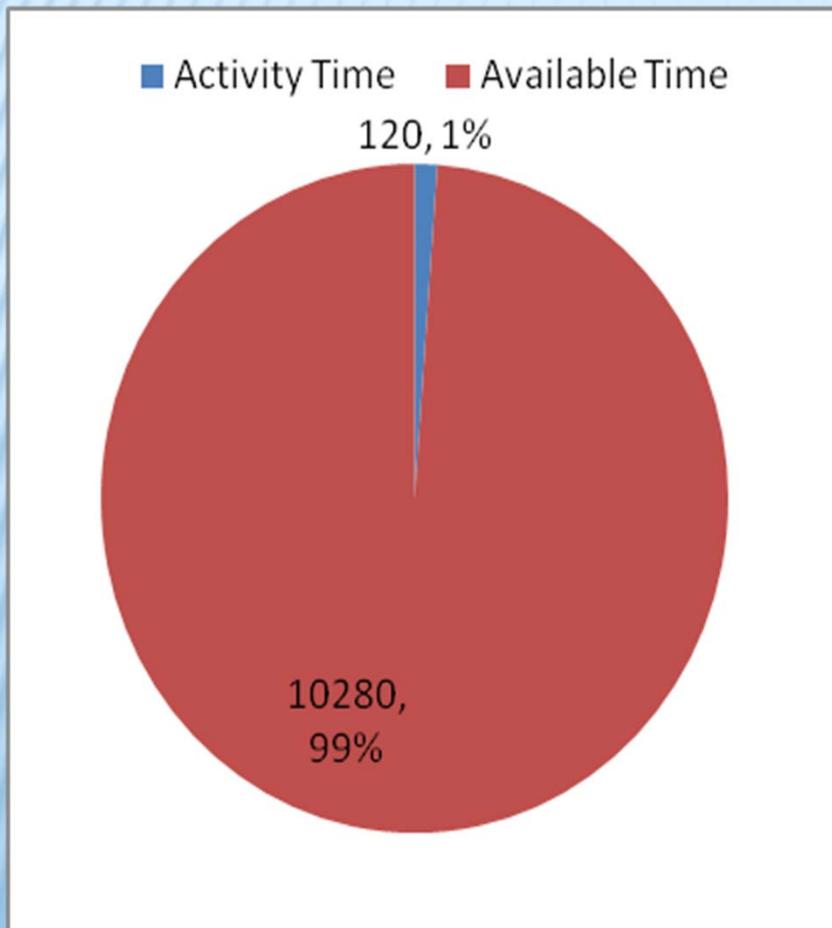


BASELINE DATA

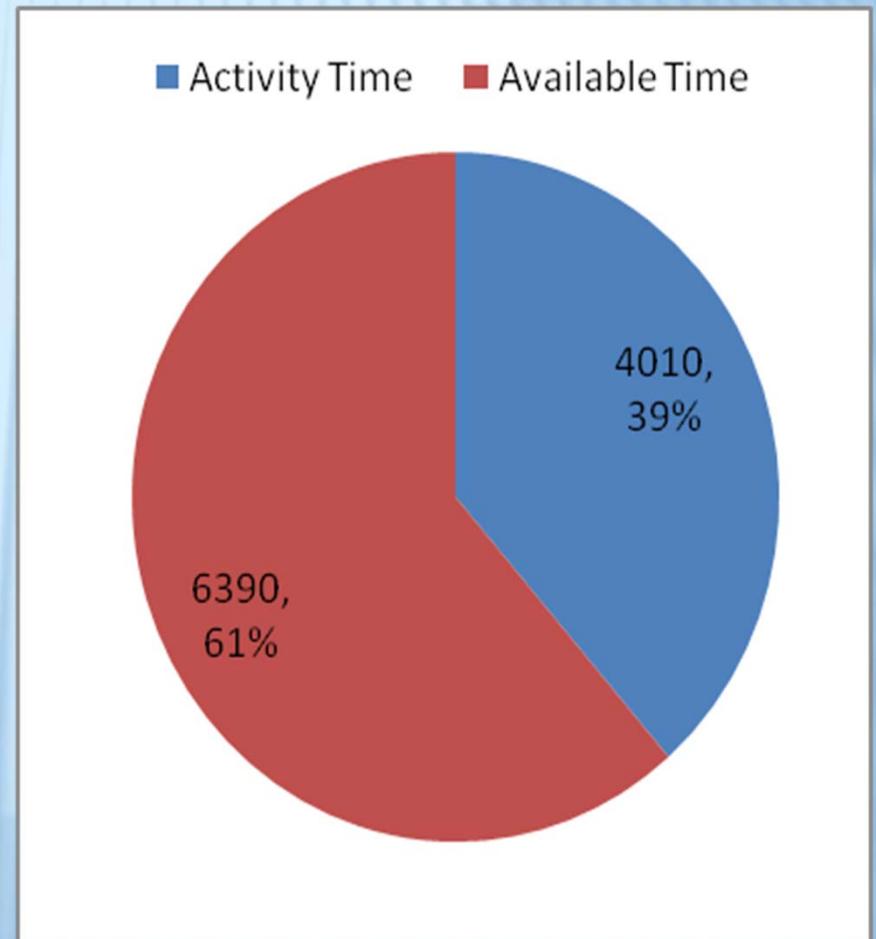


BASELINE DATA

Staff time spent in evaluation process per month



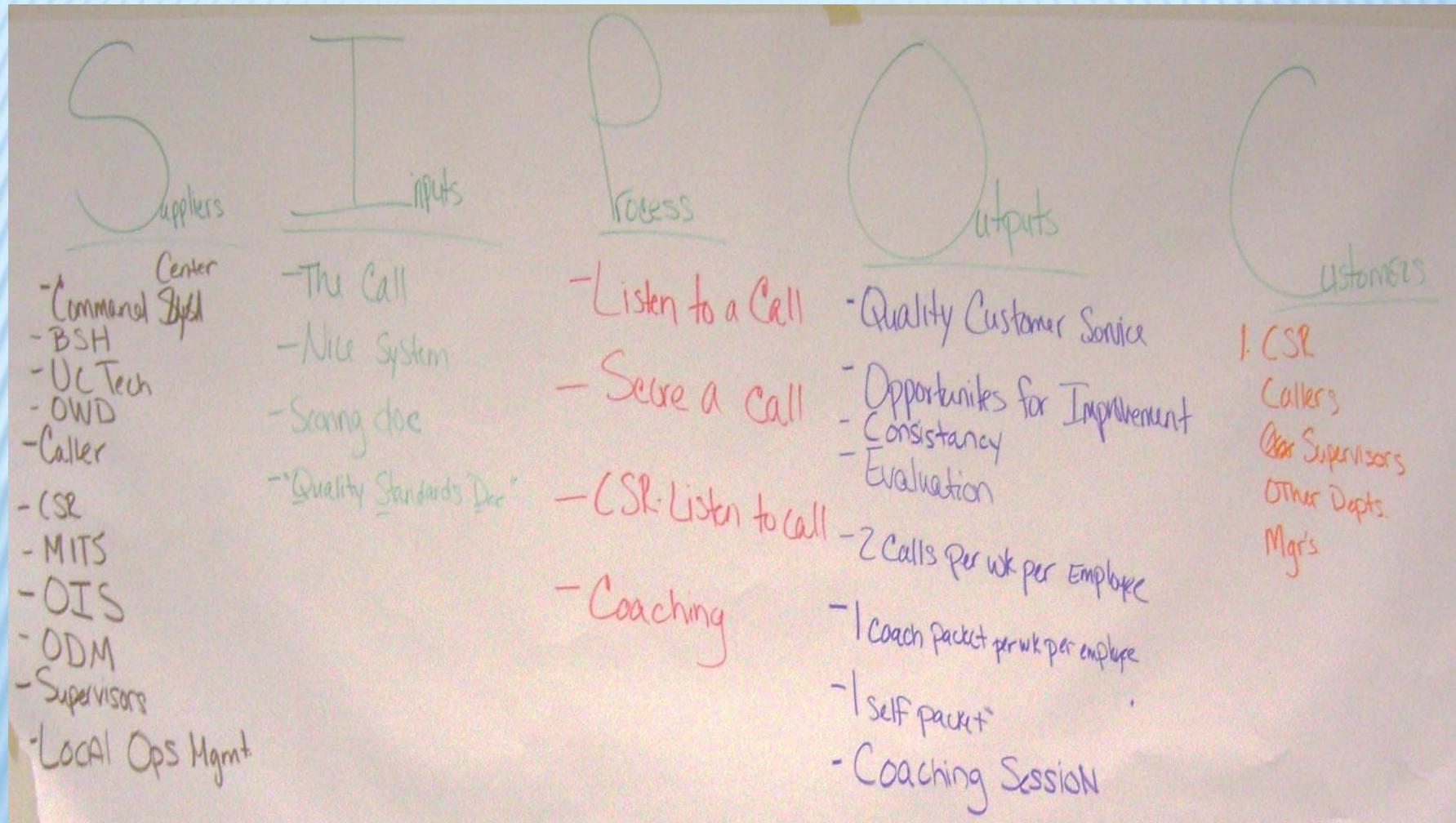
Maximum supervisor time spent in evaluation process per month



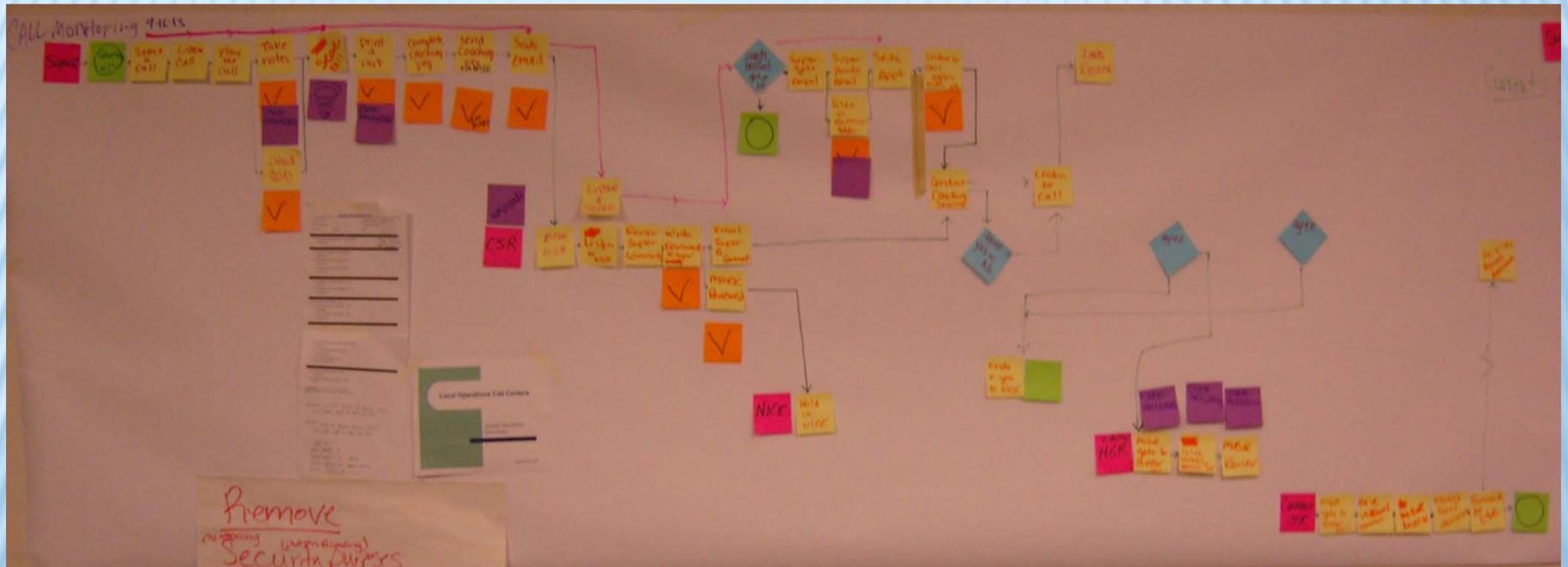
BASELINE DATA

Activity	Time (Avg.)	Minutes
Supervisor time spent monitoring and scoring calls	10 hours per week per supervisor	600 minutes
Supervisor call time spent discussing QSD and where to score items	5 hours per supervisor per month?	300 minutes
Supervisor time spent in coaching session with staff	7-10 hours a month	420 - 600 minutes
Calibration committee, each supervisor monitors call, discussed with other supervisor before scoring and attend meeting, scores call, send/read minutes and possible follow to changes	2 hours a month per supervisor	120 minutes
Supervisor conference call to discuss various scoring items time spent	30 minutes per month per supervisor	30 minutes
Staff time spent in Self evaluations, reviewing packages and coaching session	2 hours per month per staff	120 minutes
Appeals time spent by supervisor, CSR and reviewer	6 hours a month per supervisor	360 minutes
QSD revision time spent 2 or 3 hours total between all supervisors and call center team.	2 to 3 hours a month?	120 - 180 minutes
	34.5 - 36.3 hours a month per supervisor	2070-2180 minutes

HIGH LEVEL PROCESS - SIPOC



DETAILED OLD PROCESS MAP



OPERATIONAL DEFINITIONS

The new process will ...

- Increase staff morale
- Provide opportunities for staff to improve
- Ensure customers receive quality service
- Provide opportunities for quarterly adjustment to CSR evaluation level
- Reduce time to complete monitoring reviews, while monitoring where needed
- Increase CSR call time instead of CSR spending time reviewing coaching packets
- Eliminate the need for the QSD

- ❖ Expert - 2 calls / 1 packet per month
- ❖ Achieving - 4 calls / 2 packets per month
- ❖ Low - 8 calls / 4 packets per month
- ❖ All CSRs will continue to do one self-evaluation per month

TEAM BRAINSTORMING

High Impact/Low Difficulty

- Balance compassion with control
- Better score process
- Communicate changes to everyone at the same time
- Criteria for types of calls. (Ex. REA's, LE, State Hearing)
- CSR given a chance to choose package to delete
- CSR signed out in "coach" depending on length of call
- CSR's need to be scored on incoming calls only
- Different categories per call type
- Different number of monitor per CSR (Good gets less)
- Different QSD
- Group critique (Role play)
- High achiever pull own calls/score
- Incentive to improve
- Independent review (out of office)
- Indicators need to be more detailed.
- Listen with CSR at same time

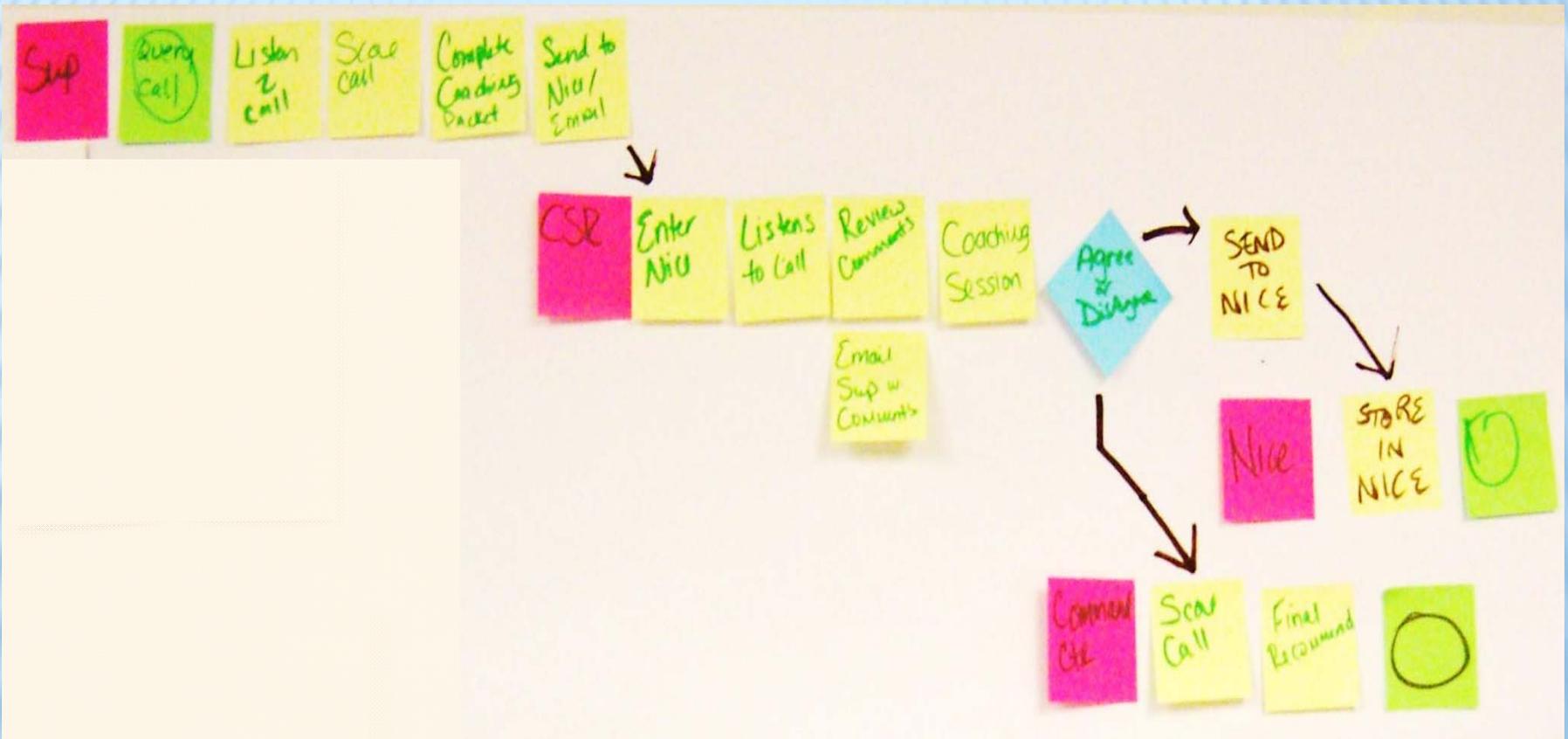


**Team came up
with more than
70 ideas for
improvement!**

IMPACT/EFFORT MATRIX



DETAILED NEW PROCESS MAP



PROJECT METRICS

Measure	Result		
Measure	Before	After	Difference
<i>Process Steps</i>	36	14	62%
<i>Handoffs</i>	7	3	57%
<i>Decisions</i>	4	1	75%
<i>Waste Points</i>	8	0	100%
<i>Hand-offs</i>	5	4	20%

PROJECT BENEFITS - INTANGIBLE

- Free up supervisor time to do other productive work
- Ensure consistent call quality
- Increased customer services
- Allow supervisors time to focus on employee training and development
- Ensure consistent evaluations of calls / CSRs

PROJECT BENEFITS - TANGIBLE

- Reduced travel cost to Columbus for out-stationed staff for evaluation conferences

IMPROVEMENT SUMMARY

Current Key Issues

Consistent Scoring

All supervisors complete the expected number of call reviews

Reduce the time needed to complete the reviews by at least 50%

How We Improved

New monitoring tool

The number of call reviews needed are determined by performance, so time is focused on those who need it.

The monitoring tool is more specific, so it will be less time consuming.

Results can be used to determine training needs

IMPLEMENTATION PLAN

TaskName	Duration	Start	Finish	Resource Names
Inform Management	1 day	Fri 9/20/13	Fri 9/20/13	Kaizen Team
Update Aspect Recording	1 day	Mon 9/23/13	Mon 9/23/13	Kathy Hamilton
Form Generation	6 days	Mon 9/23/13	Mon 9/30/13	Kaizen Team
Place form in shared drive/email	1 day	Mon 9/30/13	Mon 9/30/13	Val
Communicate with staff -email	1 day	Mon 9/30/13	Mon 9/30/13	Val
Training & Comm Plan - Pilot	1 day	Tue 10/1/13	Tue 10/1/13	Kaizen Team
Pilot 4 Supv & 35 CSRs	60 days	Tue 10/8/13	Mon 12/30/13	
Pilot Calibration Call 1	1 day	Thu 10/24/13	Thu 10/24/13	Kaizen Team & Pilot
Soft Skills Training	35 days	Mon 9/30/13	Fri 11/15/13	EBS/EOD-Robbyn Taylor/Val
Pilot Calibration Call 2	1 day	Thu 11/28/13	Thu 11/28/13	Kaizen Team & Pilot
Pilot Calibration Call 3	1 day	Thu 12/12/13	Thu 12/12/13	Kaizen Team & Pilot
Communicate with all staff via email	1 day	Thu 12/12/13	Thu 12/12/13	LO Managers
Communicate with all staff via webinar	3 days	Fri 12/13/13	Tue 12/17/13	Kaizen Team & Pilot
Official roll out of new CSR Monitoring Process	1 day	Thu 1/2/14	Thu 1/2/14	CC Management Team

COMMUNICATION PLAN

What	Who	When
Staff email about pilot	Val	9/30/2013 - 10/1/2013
Email all staff	Val	12/12/2013
Webinar to all staff	Val & Team	12/13/2013
Official roll out of new CSR Monitoring Process via Email & Nice System	Val	1/2/2014

DATA COLLECTION PLAN

- Each supervisor is performing call evaluations in the Nice System and the new paper version during the pilot, and then submitting them weekly.
- One CSR is performing self-evaluations during the pilot and submitting feedback.
- Pilot information is being compiled in order to evaluate and analyze the results.
- Results have been evaluated, and the evaluation form has been tweaked twice based on the pilot analysis.

CONTROL PLAN

	What	Who	When	Where
Measure	Number of evaluations performed Variation & consistency of scores	Supervisors, Val & Vivian	Weekly Scores	Discuss in Team Meeting/Email
Monitor	Compare scores for both forms	Team, Supervisors & Vivian	Weekly	Discuss in Team Meeting/Email
React	Are the supervisors able to properly evaluate the call	Supervisors & CSRs	Weekly	Discuss in Team Meeting/Email
Revise	Evaluation Form Revisions	Val, Team, Vivian	After team discussion	Distribute new form via email

OVERALL BENEFITS OF THE PROJECT

- Less call monitoring for supervisors
- Less monitoring packets for some CSRs
- More time for supervisors to do other duties
- More consistent and relevant scoring
- New form is streamlined and user friendly
- New process designed for staff development versus punishment
- Gives supervisors additional time to connect with staff
- Monitoring score will go from 200 to 100
- Possible 5 point bonus for exceptional calls
- Possible 0 points for a extremely bad call or action

QUESTIONS/COMMENTS

