Green Belt Six Sigma Project Report Out
Vivian Rice
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 The process is also very time-consuming, for the evaluation forms are outdated and instructions are unclear.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

<table>
<thead>
<tr>
<th>Call Centers</th>
<th># of Agents</th>
<th># of Supervisors</th>
<th># of Evaluations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Akron CC</td>
<td>17</td>
<td>2</td>
<td>71</td>
</tr>
<tr>
<td>Cincinnati CC</td>
<td>14</td>
<td>2</td>
<td>76</td>
</tr>
<tr>
<td>Columbus CC</td>
<td>34</td>
<td>4</td>
<td>289</td>
</tr>
<tr>
<td>Dayton CC</td>
<td>18</td>
<td>2</td>
<td>84</td>
</tr>
<tr>
<td>Lorain CC</td>
<td>19</td>
<td>2</td>
<td>58</td>
</tr>
<tr>
<td>Toledo CC</td>
<td>31</td>
<td>4</td>
<td>159</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>133</strong></td>
<td><strong>16</strong></td>
<td><strong>737</strong></td>
</tr>
</tbody>
</table>
### Baseline Data

**Average # of Evaluations per Agent, by Call Center**

- **Akron CC**: 4.18
- **Cincy CC**: 5.43
- **Columbus CC**: 8.50
- **Dayton CC**: 4.67
- **Lorain CC**: 3.05
- **Toledo CC**: 5.13

*Goal: 8.0 per month per CSR*

*Statewide Average: 5.54 per month*
BASELINE DATA

Average Agent Score by Call Center

Statewide Average: 192.7 per month
176 points required to pass

Perfect Score 200

Akron CC 191.2
Cincy CC 194.5
Columbus CC 191.6
Dayton CC 195.8
Lorain CC 194.0
Toledo CC 191.5
BASELINE DATA

Staff time spent in evaluation process per month

- Activity Time: 120, 1%
- Available Time: 10280, 99%

Maximum supervisor time spent in evaluation process per month

- Activity Time: 4010, 39%
- Available Time: 6390, 61%
# Baseline Data

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

S (Suppliers)
- Command Staff
- BSH
- UC Tech
- OWD
- Callers
- CSR
- MITS
- OIS
- ODM
- Supervisors
- Local Ops Mgmt

I (Inputs)
- The Call
- Nice System
- Scoring done
- "Quality Standards Den" 

P (Process)
- Listen to a Call
- Secure a Call
- CSR: Listen to call
- Coaching

O (Outputs)
- Quality Customer Service
- Opportunities for Improvement
- Consistency
- Evaluation
- 2 Calls per wk per employee
- 1 Coach packet per wk
- 1 self packet
- Coaching Session

C (Customers)
- CSR
- Callers
- Our Supervisors
- Other Depts
- Mgr's
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 Hearings)
- 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!
DETAILED NEW PROCESS MAP
## Project Metrics

<table>
<thead>
<tr>
<th>Measure</th>
<th>Result</th>
<th>Before</th>
<th>After</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Steps</td>
<td></td>
<td>36</td>
<td>14</td>
<td>62%</td>
</tr>
<tr>
<td>Handoffs</td>
<td></td>
<td>7</td>
<td>3</td>
<td>57%</td>
</tr>
<tr>
<td>Decisions</td>
<td></td>
<td>4</td>
<td>1</td>
<td>75%</td>
</tr>
<tr>
<td>Waste Points</td>
<td></td>
<td>8</td>
<td>0</td>
<td>100%</td>
</tr>
<tr>
<td>Hand-offs</td>
<td></td>
<td>5</td>
<td>4</td>
<td>20%</td>
</tr>
</tbody>
</table>
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
<table>
<thead>
<tr>
<th>Task Name</th>
<th>Duration</th>
<th>Start</th>
<th>Finish</th>
<th>Resource Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inform Management</td>
<td>1 day</td>
<td>Fri 9/20/13</td>
<td>Fri 9/20/13</td>
<td>Kaizen Team</td>
</tr>
<tr>
<td>Update Aspect Recording</td>
<td>1 day</td>
<td>Mon 9/23/13</td>
<td>Mon 9/23/13</td>
<td>Kathy Hamilton</td>
</tr>
<tr>
<td>Form Generation</td>
<td>6 days</td>
<td>Mon 9/23/13</td>
<td>Mon 9/30/13</td>
<td>Kaizen Team</td>
</tr>
<tr>
<td>Place form in shared drive/email</td>
<td>1 day</td>
<td>Mon 9/30/13</td>
<td>Mon 9/30/13</td>
<td>Val</td>
</tr>
<tr>
<td>Communicate with staff -email</td>
<td>1 day</td>
<td>Mon 9/30/13</td>
<td>Mon 9/30/13</td>
<td>Val</td>
</tr>
<tr>
<td>Training &amp; Comm Plan - Pilot</td>
<td>1 day</td>
<td>Tue 10/1/13</td>
<td>Tue 10/1/13</td>
<td>Kaizen Team</td>
</tr>
<tr>
<td>Pilot 4 Supv &amp; 35 CSRs</td>
<td>60 days</td>
<td>Tue 10/8/13</td>
<td>Mon 12/30/13</td>
<td></td>
</tr>
<tr>
<td>Pilot Calibration Call 1</td>
<td>1 day</td>
<td>Thu 10/24/13</td>
<td>Thu 10/24/13</td>
<td>Kaizen Team &amp; Pilot</td>
</tr>
<tr>
<td>Soft Skills Training</td>
<td>35 days</td>
<td>Mon 9/30/13</td>
<td>Fri 11/15/13</td>
<td>EBS/EOD-Robbyn Taylor/Val</td>
</tr>
<tr>
<td>Pilot Calibration Call 2</td>
<td>1 day</td>
<td>Thu 11/28/13</td>
<td>Thu 11/28/13</td>
<td>Kaizen Team &amp; Pilot</td>
</tr>
<tr>
<td>Pilot Calibration Call 3</td>
<td>1 day</td>
<td>Thu 12/12/13</td>
<td>Thu 12/12/13</td>
<td>Kaizen Team &amp; Pilot</td>
</tr>
<tr>
<td>Communicate with all staff via email</td>
<td>1 day</td>
<td>Thu 12/12/13</td>
<td>Thu 12/12/13</td>
<td>LO Managers</td>
</tr>
<tr>
<td>Communicate with all staff via webinar</td>
<td>3 days</td>
<td>Fri 12/13/13</td>
<td>Tue 12/17/13</td>
<td>Kaizen Team &amp; Pilot</td>
</tr>
<tr>
<td>Official roll out of new CSR Monitoring Process</td>
<td>1 day</td>
<td>Thu 1/2/14</td>
<td>Thu 1/2/14</td>
<td>CC Management Team</td>
</tr>
</tbody>
</table>
## COMMUNICATION PLAN

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff email about pilot</td>
<td>Val</td>
<td>9/30/2013 - 10/1/2013</td>
</tr>
<tr>
<td>Email all staff</td>
<td>Val</td>
<td>12/12/2013</td>
</tr>
<tr>
<td>Webinar to all staff</td>
<td>Val &amp; Team</td>
<td>12/13/2013</td>
</tr>
<tr>
<td>Official roll out of new CSR Monitoring Process via Email &amp; Nice System</td>
<td>Val</td>
<td>1/2/2014</td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>What</th>
<th>Who</th>
<th>When</th>
<th>Where</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Measure</strong></td>
<td>Number of evaluations performed</td>
<td>Supervisors, Val &amp; Vivian</td>
<td>Weekly Scores</td>
</tr>
<tr>
<td></td>
<td>Variation &amp; consistency of scores</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Monitor</strong></td>
<td>Compare scores for both forms</td>
<td>Team, Supervisors &amp; Vivian</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>React</strong></td>
<td>Are the supervisors able to properly evaluate the call</td>
<td>Supervisors &amp; CSRs</td>
<td>Weekly</td>
</tr>
<tr>
<td><strong>Revise</strong></td>
<td>Evaluation Form Revisions</td>
<td>Val, Team, Vivian</td>
<td>After team discussion</td>
</tr>
</tbody>
</table>
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