



OnviCord Excella Quality Assurance and OnviCord Pictora Screen Capture

10 Best Practices for Implementation

1. **Internal Discovery Session:** Supervisory staff discerns goals and criteria required to achieve goals for Quality Assurance (QA).
2. **Outsourcing Discovery Session:** Supervisory team and client discuss goals, requirements, and time lines outlined in a pre-campaign launch checklist.
3. **Assignment of Project Manager:** QA Coordinator acts as single point of contact to coordinate QA template development, scoring criteria, training schedules and to communicate with clients (if applicable) throughout ramp up and ongoing deployment.
4. **Post-Discovery Coordination:** QA Coordinator, trainer, supervisors and system administrator finalize activities required to execute QA before campaign launch.
5. **Supervisory & Agent Training:** Trainer schedules and conducts training for all users. Employ role-playing, real world examples and OnviSource materials and e-training videos. Train agents to retrieve evaluations and perform self-review to understand evaluation feedback, scoring, reports and coaching methods.
6. **Template Creation:** Use goals set in discovery, KPI's, and compliance requirements to guide development of templates to ensure effectiveness.
7. **Evaluation Scheduling:** In accordance with goals set in discovery sessions, configure individuals/groups and automate recording schedules to place recordings into supervisory evaluations queues.
8. **Live Monitoring:** Live monitor customer interactions as they happen on a per selection basis or used in scan mode (for voice recording only) to monitor a sampling of interactions and agent activity.
9. **Workforce Optimization Analytics:** Create and save reports for analysis of all evaluation criteria regarding individual/group performance, template comparisons, template segments, questions, subjects, scores, etc. Schedule daily and/or weekly review sessions with supervisors and sessions between supervisors and agents to regularly drill down and analyze performance and productivity data.
10. **Evaluation Integrity:** Conduct periodic review sessions with supervisors to maintain uniformity in evaluation processes and scoring.