Achieving Calibration Success

By Roger Lee, Director of Consulting Services, etalk

Many organizations wonder, “How can calibration sessions be effectively implemented?” It is a daunting task that requires careful strategy and planning in order to ensure the process is as efficient and constructive as possible. From the outset, it is important for everyone on your team to understand that the purpose of having calibration sessions is to get all parties looking through the same lens as they evaluate a call.

It is also just as important to keep in mind what calibration is not. Calibration sessions are not used to calibrate the monitoring form. As many of us have discovered, there is a tendency to use the calibration session as a venting session about how the questions are unclear or unfair and that they need to be changed on the monitoring form.

My advice: Don’t waste the time of your team leaders, supervisors and quality assurance associates by bickering about the types of questions on the monitoring form. Instead, do your best to keep the focus on the behaviors that make the call successful. Below are some of my recommendations on the DOs and DON’Ts of calibrations:

Calibration DOs:

First, I recommend that calibration sessions should last no longer than one hour. Structure these sessions so that measurable progress can be made and tracked.

Second, communicate ground rules at the beginning of every calibration session. Ground rules ensure everyone involved understands the purpose of the calibration session. Examples of ground rules are:

- Confidentiality – what gets said in confidence, stays in confidence
- Be honest with others and with yourself
- Allow yourself to be vulnerable and unafraid of constructive criticism
- Be willing to take risks in stating a business case
- Above all, remain open-minded to the input of others in the group

Third, have calibration sessions with the following groups, being careful to clearly define the frequency, process and purpose for sessions.

  - Leadership team – once a month for one hour, no scoring involved, just listen to calls, get input on what leadership would coach the agent, determine if the call is good or bad
  - Team leaders, supervisors
  - Quality Assurance associates
  - Training, process improvement teams, human resources

Take time before the calibration session ends to talk about what went well and what needs improvement in the session. Then determine and communicate action items for the next calibration session.

Send out calls prior to calibration sessions for a “pre-calibration.” This is an important step that allows participants evaluate the call, provide input on both strengths and opportunities for improvement. Next, send the feedback to the facilitator to compile information and review during the actual calibration session the areas of difference. Discuss areas that differed.

Set a goal, or metric, of how close participants need to be calibrated with one another. I like to see a calibration goal of no more than 5 percent variance between scores.

Calibration DON’Ts
Just as there are best practices, there are also clearly some actions and behaviors to avoid if at all possible.

- Don’t immediately begin tick marking the call. Listen to the call first, and then agree or disagree at a high level whether the call is good or bad
- Don’t calibrate the monitoring form
- Don’t quickly dive into the minutia of the call. Remember, you are dealing with agents/ people with feelings, just like yourself.

Calibration sessions are an important element of an effective quality monitoring program. Organizations must make time to have these sessions. The ultimate goal is to provide meaningful feedback to help agents be successful. If you invest the time with your frontline employees, you will see measurable results.