SOP: Agent Performance Monitoring and Quality Assurance

This SOP details the processes involved in **agent performance monitoring and quality assurance**, including setting performance standards, conducting regular evaluations, analyzing call metrics, providing constructive feedback, implementing training programs, and ensuring compliance with organizational policies. The objective is to enhance agent productivity, maintain high-quality customer interactions, and continuously improve overall service delivery through systematic performance assessment and quality control measures.

1. Purpose

To outline standardized processes for monitoring agent performance and assuring service quality, ensuring operational excellence and customer satisfaction.

2. Scope

This SOP applies to all customer service agents, team leaders, quality assurance staff, and trainers within the organization.

3. Responsibilities

- **Quality Assurance (QA) Team:** Monitor and evaluate agent performance, provide reports and feedback.
- **Supervisors/Managers:** Review evaluations, deliver feedback, and implement improvement plans.
- **Agents:** Adhere to standards, participate in training, and implement feedback.
- **Trainers:** Design and facilitate relevant development programs.

4. Procedure

1. **Setting Performance Standards**
   - Define Key Performance Indicators (KPIs) and quality benchmarks for agents (e.g., CSAT, AHT, FCR).
   - Review and update standards bi-annually or as required.
2. **Regular Evaluations**
   - Conduct scheduled monitoring through call reviews, screen recordings, or mystery shopping.
   - Randomly select sample interactions for unbiased assessment.
3. **Analyzing Call Metrics**
   - Utilize QA tools and reports to extract actionable insights (e.g., adherence to scripts, tone, solution accuracy).
   - Monitor trends and identify areas for improvement.
4. **Providing Constructive Feedback**
   - Schedule feedback sessions with supporting data and specific improvement suggestions.
   - Document feedback and agent responses for tracking.
5. **Implementing Training Programs**
   - Organize recurring and targeted training based on performance gaps.
   - Evaluate training effectiveness via post-training assessments or QA reviews.
6. **Compliance Monitoring**
   - Ensure agents comply with legal, regulatory, and company policy requirements.
   - Escalate and document violations per disciplinary protocols.

5. Records and Documentation

- Maintain evaluation sheets, feedback logs, and training records for at least 12 months.
- Keep all documentation secure and confidential.

6. Quality Metrics Table (Example)

Metric	Description	Target
Customer Satisfaction (CSAT)	Score from customer feedback surveys	≥ 85%

First Call Resolution (FCR)	Percentage of issues resolved in first contact	≥ 75%
Average Handle Time (AHT)	Average time to handle customer cases/calls	≤ 6 minutes
Quality Score	Score from QA monitoring checklists	≥ 90%

7. Review and Continuous Improvement

- Periodically review SOP effectiveness and update as operational needs evolve.
- Encourage feedback from agents and QA staff for ongoing process refinement.

8. References

- Company Quality Assurance Policy
- Customer Service Training Manual
- Applicable Industry Standards and Regulations