



Call Calibration

Management Plan Excerpt

3.1.3 Internal Calibrations

The IQA Team will meet monthly to conduct internal calibration sessions with IQA staff to discuss scoring differences. Calibration sessions will include members of the TQC Training and Content Teams to communicate expectations for the quality of service that training and content materials must support. The IQA Team will select a random sample of calls, and all IQA reviewers will score the calls prior to the calibration session. (Note: These scores will not be included in the production scoring data.) Scores will be summarized and presented anonymously to the group. Areas of disagreement will be discussed among the group in an open and constructive manner focused on developing consensus while citing specific scoring guidance from QCM materials. Based on the calibration results, the original reviewers' scores will be updated in the system of record for scorecard data. Additionally, reviewers' calibration scores will be collected and trended to identify potential outliers. Any areas of significant differences will be noted as opportunities for individualized coaching and training.

3.1.3. National Calibrations

CMS, the IQA Team, and CCO quality stakeholders will meet on an as-needed basis, at the direction of CMS, to receive scoring guidance from CMS based on audits of IQA and CCO quality scorecards. TQC will facilitate the calibration sessions and play calls for attendees. TQC and CCO reviewers will present their scoring rationales, with CMS providing the final scoring guidance. The results of calibration sessions and CMS guidance will be collected for consideration when updating QCM materials (Management Plan Excerpt, page 6-7).

The main idea of calibrating anything is to make sure each part is working as a whole – a unit. Just as any machine operates reliant on all its part working in tandem, so must a team. This is done by collaboration as part of a team--to visit and revisit if necessary--the parameters of each criteria used to evaluate Customer Service Representatives (CSRs) in order that scoring for CSRs is consistent and aligns. This alignment starts at the top because supervisors, managers, and directors must not only be on par with their teams but be role models.

Calibration is used to decrease perceived bias by ensuring consistent scoring. Once calibration among all those responsible for quality monitoring and coaching is achieved, it will not matter who does the monitoring and scoring, because the outcome should be the same. Once QAs experience this level of consistency, the coaching process can focus on recognizing achievements and identifying areas for improvement, rather than disputing whether or not a particular score is fair or accurate. Several calibrations may be needed for the team to be on par; however, once it is done, maintenance becomes easier. Also, any time an analysis tool is redesigned, it is time to re-calibrate. Team parity is essential for a smooth process in any endeavor.

Standardized scoring provides a quantitative measurement of consistent quality evaluation. CSRs and therefore QAs performances

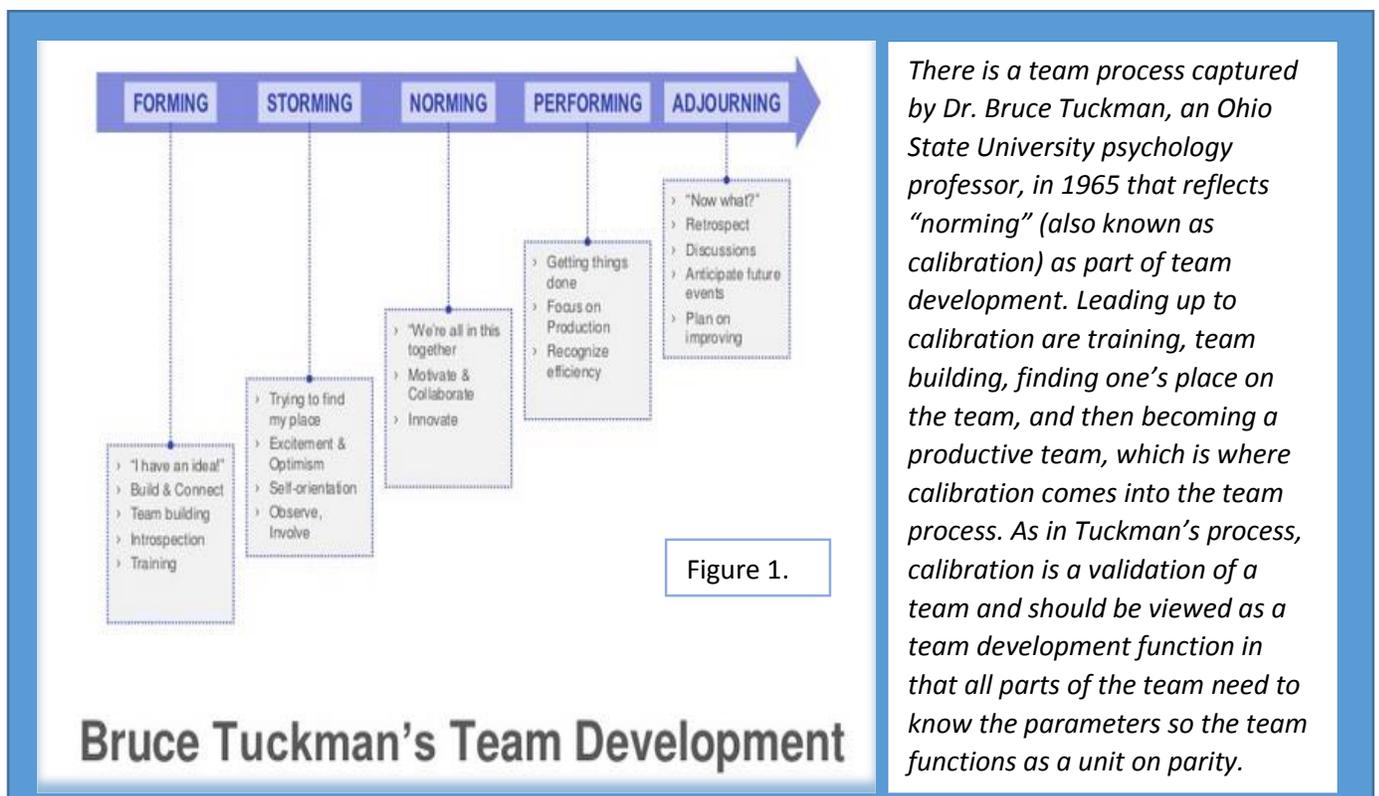
CALIBRATION REQUIREMENTS

“Team Highpoint will meet on a weekly basis for the purpose of calibration; included in these calibration sessions on a monthly basis will be the CCO contractor to ensure that there is consistency in the manner in which CSRs are being evaluated” (RFP, page 33).

are dependent upon a scoring process that:

- Standardizes evaluation scores that when rendered are the same regardless of who does the call monitoring
- Confirms that CSR behaviors being measured are tied to quality service (as exhibited by behavior)
- Validates the effectiveness of CSR performance standards and call center procedures
- Provides consistency in the service provided to the customer/client (soft skills/PPOMS)

Calibration is not a single event, but an ongoing process. One calibration session will not have everyone in agreement but does move the team towards that goal. In fact, initial calibrations may only highlight how much disparity there is amongst team members, which is natural without a calibration program. It takes considerable commitment and many hours of discussion and evaluation before teams can score calls with consistent uniformity.



Bruce Tuckman's team development model places calibration (norming) in the developmental stages of

a team. It is the pivotal point where all individual members within the team start seeing with the same “vision.” He calls the process motivation within unity (or plainly group collaboration) where innovation is born.

Without appropriate discussion and open communication, the criteria can become biased in the QA’s mind. Once flawed, quality–scoring glitches can become askew in the process. Calibration ensures all those involved in evaluating CSR performance have a common understanding of the quality elements being assessed. When calibration is achieved, it will not matter who does the monitoring and scoring, because the outcome should be the same.

A Facilitator

The facilitator leads calibration sessions. In addition, he/she directs its logistics, technology for playing back calls, and enforces the team to adhere to time allotted for calibration (one hour is best). The facilitator is responsible for the process, not the decision. Having a room full of opinionated people can often be difficult to manage and rules of engagement must be outlined at the beginning. The goal is to reach consensus on the performance standard and/or evaluation criteria for a successful call, and then apply that learning to evaluating calls in the future. It is not important to agree on a final score but instead to close the gap between the current scoring differential.

Note-Taker(s)

Designate at least one note taker for each session. The facilitator will compile more than one set of notes if there are more, and then post them on the team discussion board in QA Corner to discuss amongst the QAs. They will comprise a log, which can serve as institutional memory for what works and what does not. Make sure everyone gets a copy and follow-up is addressed at the next calibration and that documentation is ongoing. Discussion on the topics can continue on the discussion board and those trouble spots can be revisited in the next calibration to see if more parity has been met through discussion and awareness. (process?)

Log/Journal:

- Frequency: 1- week to 1-month
- Duration: 1-hour
- Facilitator:
- Notes: Include lessons learned, action items, and suggestions on how to self-

- assess
- Discussion Board summary/consensus
- Recalibration.
- Keep a record of the scores with each calibration session for before and after.

Scoring Calls Prior to Calibration

Prior to any calibration session, the facilitator sends all participants the call(s) and the item(s) to be addressed. Have the calls scored into a scoring card (Verint?) (or some visual representation) so that the facilitator can keep a record of the initial scores for coaching. Involve supervisors, team leads, training, and the quality team. This is essential. It would be wise to involve senior management who can view the performance standards as evaluated by his/her team. The facilitator tabulates the scores prior to the session, which not only takes into account peer pressure while attempting to score within the group, but also allows for identifying the standard deviation that marks progress toward calibration goals and milestones.

Procedure

The idea is for the team to commit to the process and allow the facilitator to conduct a learning experience. Everyone should feel comfortable sharing his/her interpretation of the criteria if he/she desires. Only judge

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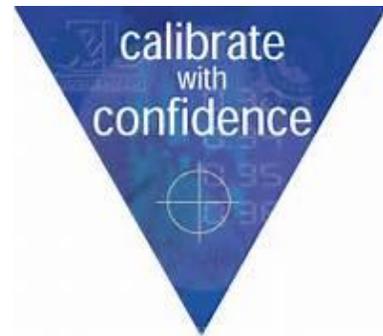
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the criteria, not the person who shares her insight. Interpretation is subjective and defined by a person's experiences. Subjectivity needs objectivity and this is where the facilitator often becomes a mediator by getting to the core of the differing interpretations.



Some helpful tips for facilitation is to:

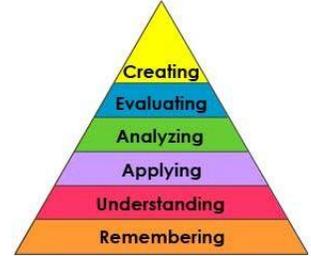
- Allow one hour. Anticipate lively debate, but keep on task. There is nothing worse than dragging out disagreements.
- Focus on facts: use the evaluating criteria to guide discussions. Use measurable tasks, what can be learned versus what can be intuited.
- Create an environment where everyone feels safe in sharing their interpretations – remember, right or wrong, they have an opinion for a reason.
- Allow others to speak without interrupting.
- Assign QAs special topics/research

It takes hours of discussion to reach a conclusion on the criteria but the process works toward team identity by creating an understood metric with which to evaluate.

The Calibration Session

Review the Score Card (or a section in it) at the beginning of each session to be sure everyone understands what the criteria means. Successful calibration is the equivalent in Bloom's Taxonomy of *analysis/synthesis* where analysis breaks into parts the subjects/topics/ideas being investigated and then synthesis puts those same things back together into a whole that can be viewed differently than it was at first presented. This leads to evaluation. Evaluation for the QA team must be ongoing and consistent.

- If the call(s) was sent post the scores anonymously on a flip-chart, PowerPoint or some other visual representation (white board, etc), so the variance is apparent.
- Ask one person to summarize the call.
- Then look at the area(s) with the most differentiation or that were assigned.
- At the end of the session, summarize lessons learned and capture in notes.



Tackle each area accordingly, until parity is met. Working one section at a time is ideal and before long, looking at five to six calls in an hour will be the norm.

- a) The IQA plan shall address the frequency, nature, and process for conducting quality assurance monitoring activities, and internal calibration activities, as well as, consider calibration sessions in conjunction with the CCO. The plan shall contain metrics to identify the learning gaps/training needs of the CCO contractor's staff and track the actions, by date, taken to address those needs. (RFP SOW page 15.)