

Quality assurance with AI: A customer service guide



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What is customer service quality assurance?

Customer service quality assurance has become a standard practice for ambitious businesses. Though simple in nature, it improves retention, drives customer loyalty, and decreases operational costs. Also known as support QA, it is the practice of reviewing customer conversations to improve your support team's performance and increase customer satisfaction.

Until recently, all reviews had to be done manually by a quality specialist or team lead. However, with the advent of automated quality assurance, AI-powered tools like Zendesk QA can now autoscore 100% of conversations across common categories. This allows teams to focus their reviews on critical conversations that highlight areas for improvement.

QA reviews feed vital data into a feedback loop that improves customer service experience continuously and systematically.



The difference between measuring support quality and measuring customer satisfaction

While customer metrics like Customer Satisfaction Score (CSAT) and Net Promoter Score (NPS) are valuable for understanding customer happiness and loyalty, they are not instrumental in helping your team improve their quality of service.

When customers rate customer support, their score can reflect factors outside of support control, for example:

- Pricing and value
- Critiquing the product itself
- Return and refund policies

Customers also do not understand a company's service standards. At times their expectations may surpass what your support team is capable of delivering, at times internal expectations may be higher than those of your customers.

QA gives you a true understanding of customer expectations and how well your team is doing.

The Internal Quality Score (IQS) is the metric that shows team performance based on internal quality standards. Every conversation that gets reviewed is scored against the categories on your QA scorecard, and the IQS is calculated based on the total scores.

If you truly want to measure customer service quality, you need to combine:

- **External evaluations** (collected in customer surveys like CSAT or NPS) that reflect your customers' attitudes toward your product, support, and company in general.
- **Internal evaluations** (customer service quality assurance) that rate customer interactions based on your internal quality criteria.

Why quality assurance matters

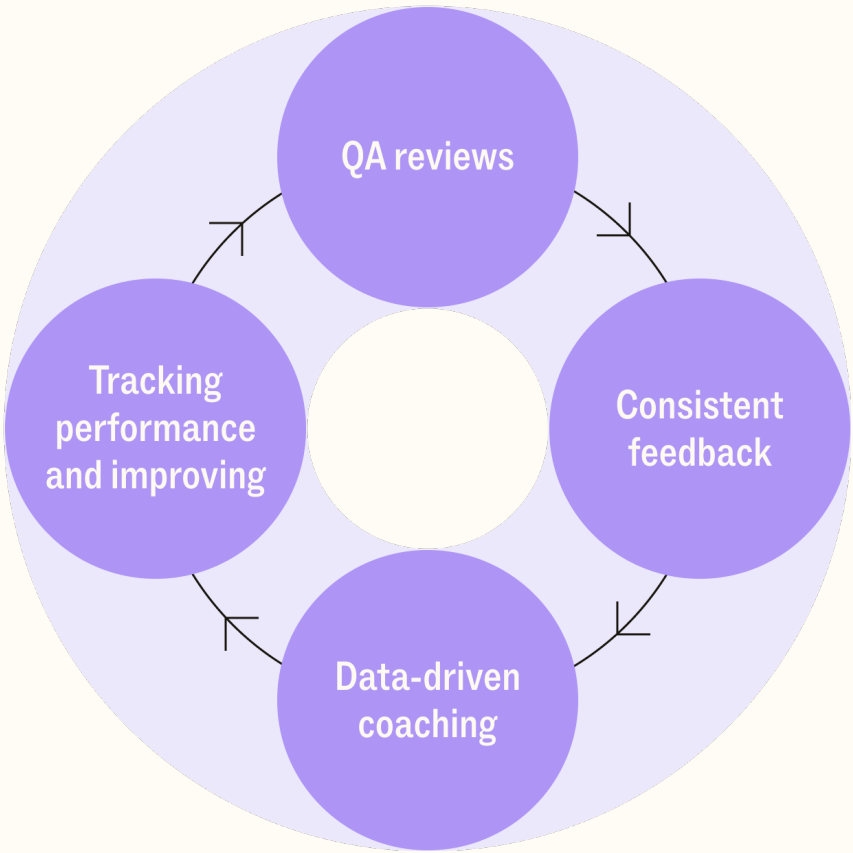
AGENT ENGAGEMENT

REDUCE OPERATIONAL COSTS

IMPROVING CUSTOMER SATISFACTION AND LOYALTY

Quality assurance (QA) significantly enhances customer service agent engagement by creating a supportive, growth-focused environment. Bring everyone into the fold with regular reviews, opening a dialogue about performance that is team-wide. That awareness builds trust and encourages agents to maintain consistent high standards.

While most teams understand the importance of consistent training and development, this can sometimes lead to a broad, one-size-fits-all coaching approach. These generalized methods can backfire, leading to disengagement rather than the desired engagement. **Using QA to pinpoint individual strengths and areas for improvement allows agents to take ownership of their performance.** Targeted, data-driven coaching reduces time wasted on generic training.



Why quality assurance matters

AGENT ENGAGEMENT

REDUCE OPERATIONAL COSTS

IMPROVING CUSTOMER SATISFACTION AND LOYALTY

Sophisticated quality assurance technology helps you go beyond conventional manual QA practices to make your support operations more cost-effective.

The oft repeated mantra of ‘doing more with less’ can be elusive. Teams can instead feel overwhelmed when fighting to balance their support quality with budget constraints. Adding too many tools to the tech stack fuels the flames of this fire. Yet fully utilizing the features of a QA tool fully integrated within your helpdesk improves operational efficiency.

AI-driven QA tools free up time for teams to focus on strategic enhancements and training. Automating the chains that link a QA process, like finding the most important conversations to monitor and assigning them to regular reviewers, allows for continuous improvement without the hours spent on upkeep.

How QA reduces long-term support costs

- **Banishing agent knowledge gaps for improved support accuracy**

Advanced analytics helps pinpoint weaknesses at a language, team, or agent level. Easily feed review data into your coaching incentives to reduce cost spent on inefficient support.

- **Improving agent retention**

\$8.8 trillion is lost annually by global businesses, due to low productivity of disengaged employees. Recognizing and investing in their work with regular quality reviews gives every agent value.

- **Reducing managerial hours spent on manual reviews and process upkeep**

QA automations give you unprecedented insight into your support quality. Automate not only the smooth-running of the improvement process, but the scoring of 100% of conversations for the most common categories, like Grammar and Tone.

“Zendesk QA has cut down my time spent per review by around half when you factor in all of the manual work we did prior.”

Ross Parmly,
Senior Customer Advocacy Manager



Why quality assurance matters

AGENT ENGAGEMENT

REDUCE OPERATIONAL COSTS

IMPROVING CUSTOMER SATISFACTION AND LOYALTY

Quality assurance can be the best way to identify blockers in your customer experience.

Customer expectations are a moving target, and implementing a robust QA program is essential to closing in on the CSAT bullseye. Through quality assurance, you can identify and address issues proactively. By analyzing conversations, support teams can pinpoint specific issues and identify patterns that contribute to customer dissatisfaction. Quality assurance identifies opportunities for improvement through two primary approaches:

- Customer service team factors, such as agent performance and support processes which can be managed internally per customer service team.
- External factors, such as product or pricing, which can be escalated to decision makers so that broader changes can address recurring problems.

How is AI changing customer service quality?

When you talk to people in customer service about how artificial intelligence is going to change the way businesses converse with customers, it's tough not to err on the side of hyperbole. However, it's still important to remember that the customer is always human. Meeting customer expectations is the primary goal of customer support.

AI's capabilities in generating real conversation, acting as assistants in both our professional and personal lives cements a new era in communication. It brings new facets to customer support on both sides of the coin (customer and company). As customers of all generations adapt, their expectations heighten because:

- **Companies are able to provide faster, more accurate and personalized service.**

Customer service agents are now supported by software and tools that provide them with precise, personalized data on both products and customers for more complex situations. AI agents are now assisting customers in troubleshooting, order tracking, appointment scheduling, and more.

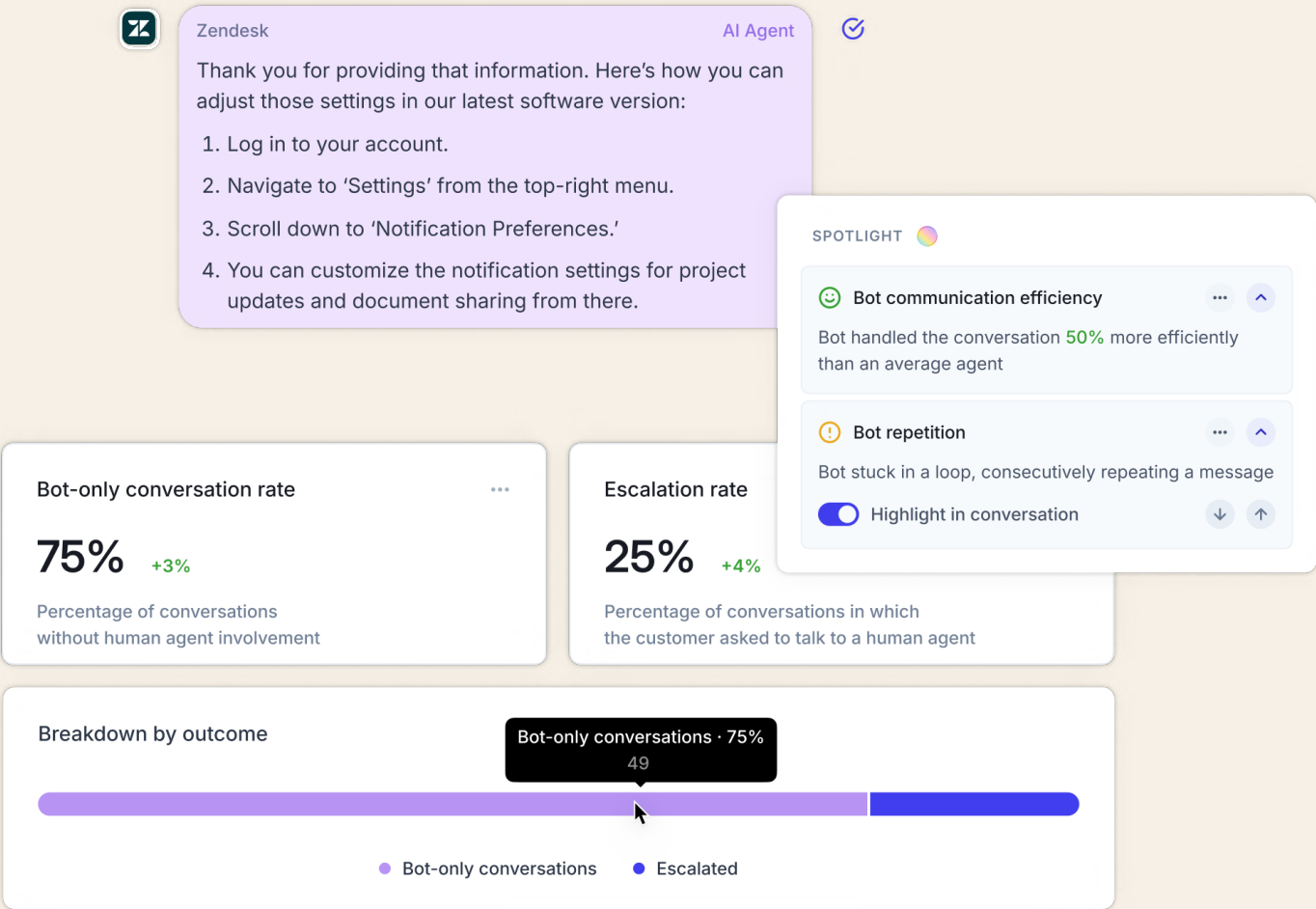
- **Humans expect perfection from machines.**

Self-driving cars are the requisite example. Self-driving cars can't drive drunk, they don't get tired, or text while driving. Yet the vast majority (68%) of Americans fear self-driving cars. (Forbes) The media tends to give more extensive coverage to fatalities resulting from accidents involving these cars, as compared to those caused by human errors. The same comparison can be made for customer expectations of AI agents compared to human service agents.

AI is fundamentally transforming customer service by setting new standards for efficiency, personalization, and availability. **Quality is, therefore, an ever moving target molded by customers’ evolving expectations.**

A robust quality assurance process which takes advantage of new innovations in customer service technologies, like AutoQA, help teams achieve even the highest standards in customer support quality.

Use AI to uncover the blind spots in your AI agent support quality



What is automated quality assurance (AutoQA)?

AutoQA is short for automated quality assurance. This is the process of using AI to self evaluate support tickets. It takes into account multiple categories, like Grammar and Empathy, and languages to handle huge ticket volumes in less time.

Automated quality assurance acts as your first line of quality control, helping support teams gain insight into 100% of their interactions with customers. It provides you with a complete, unbiased overview of your support performance and training needs, saving time for reviewers to focus only on the most critical conversations.

The average company can only manually review 2% of their support conversations. (Customer Service Quality Benchmark Report, 2023) That time should be spent on analyzing the conversations which offer the highest learning potential – ones which give your quality team precise insights into how customer satisfaction may be negatively impacted.

However, that's not to say that the 98% do not have value. Every conversation is worthy when you want to understand conversation quality from a statistical standpoint. This includes insight into your AI agent performance. **Without having to open a single interaction, AutoQA gives you insight into trends and patterns of both overall customer sentiment and team performance.**

Your automated QA metric

The **Automated Quality Score (AQS)** is an AI-driven metric that evaluates the quality of interactions across an entire support team. It is calculated similarly to the Internal Quality Score (IQS) but is based on active AutoQA categories. In Zendesk QA, your AQS is displayed alongside IQS, allowing for easy comparison and deeper insights into performance trends and improvement areas.

$$\frac{\text{SUM OF RATINGS}}{\text{MAXIMUM AVAILABLE SCORE} \times \text{NUMBER OF CATEGORIES}} \times 100 = \text{IQS (\%)}$$

Best practices for an AI-powered QA program that fits your goals

All companies have a unique concept of what matters most for their business and customers. While speed and accuracy are headline performance indicators for every support team, the measure of excellent customer service quality varies per industry, product, company size, etc.

A thorough quality assurance plan will set your team up for success regardless of priorities. Some focus on delivering personalized assistance to drive product engagement and upsell their products — while others might prefer to keep their interactions short and speedy.

Quality assurance programs should be set up with consideration of how to meet these goals. While no process should be set in stone, starting with a strong foundation to build a team that meets customer expectations requires understanding the options and intricacies available when using a QA tool.

GOAL EXAMPLES

90%

Improving the quality of customer service by pushing both IQS and CSAT above 90% by the end of the year.

80%

Upselling in every interaction, scoring at least 80% in the “Upselling products” rating category in QA reviews.

Building your scorecard: categories and scores

A well-structured scorecard helps rate how well your team's support interactions align with internal customer service standards.

Choosing categories for manual reviews

Each quality criterion should have at least one corresponding rating category.

A streamlined approach, using up to 5 rating categories, offers a simplicity that most teams find effective for manual reviews. However, more complex scorecards are sometimes recommended in industries where QA is used to enhance regulatory compliance.

Prioritization is key when selecting categories for your scorecard. Start by identifying the most critical aspects of your customer interactions and assign more weight to these categories. For example, if resolution time is crucial for your team, you can use Zendesk QA to give it more weight in the final score.

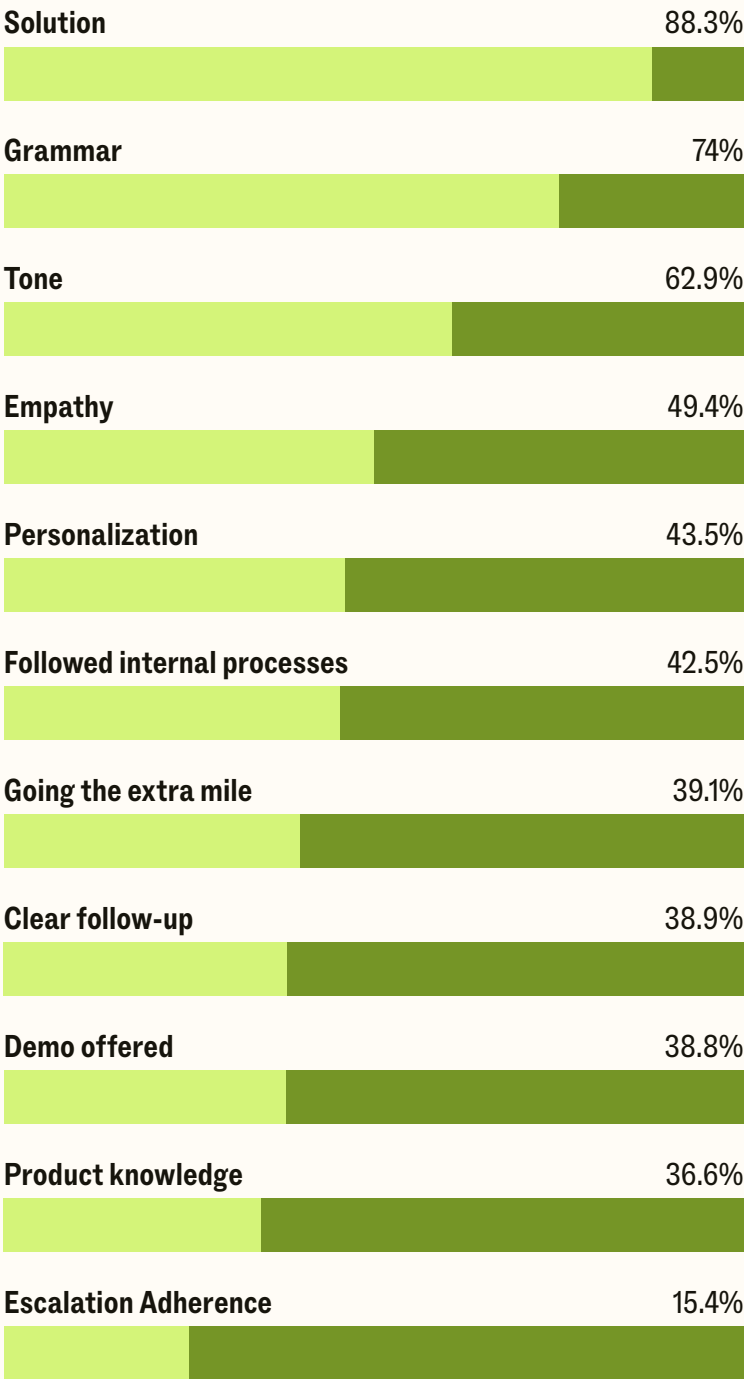
Additionally, you can mark certain categories as critical, meaning that failing in these areas could result in the entire ticket being marked as failed. This approach ensures that your team focuses on what truly matters.

Rating scales can range from 2 to 11 points or more. While a larger scale provides more precise results, it can also complicate the assessment process, and many teams opt for a binary pass or fail instead.

Balance the need for detail with the practicality of the review process to find a scale that works best for your team.

How companies set up their scorecards in Zendesk QA

Most common categories:

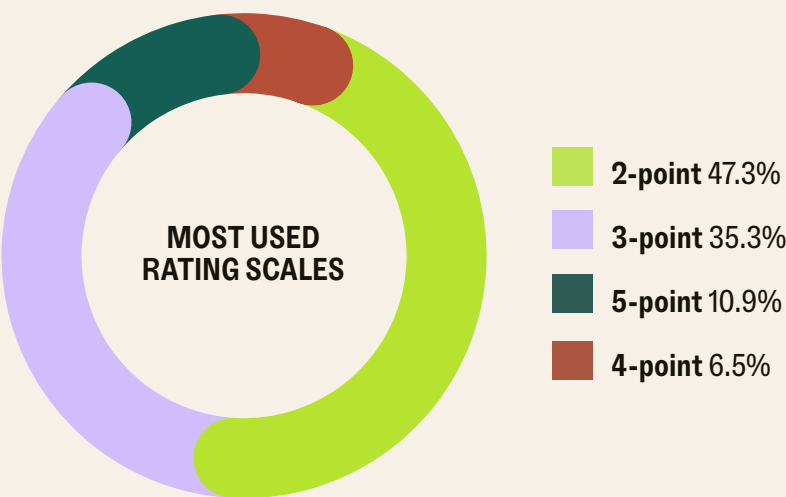


14

Average number of categories

8

Median number of categories



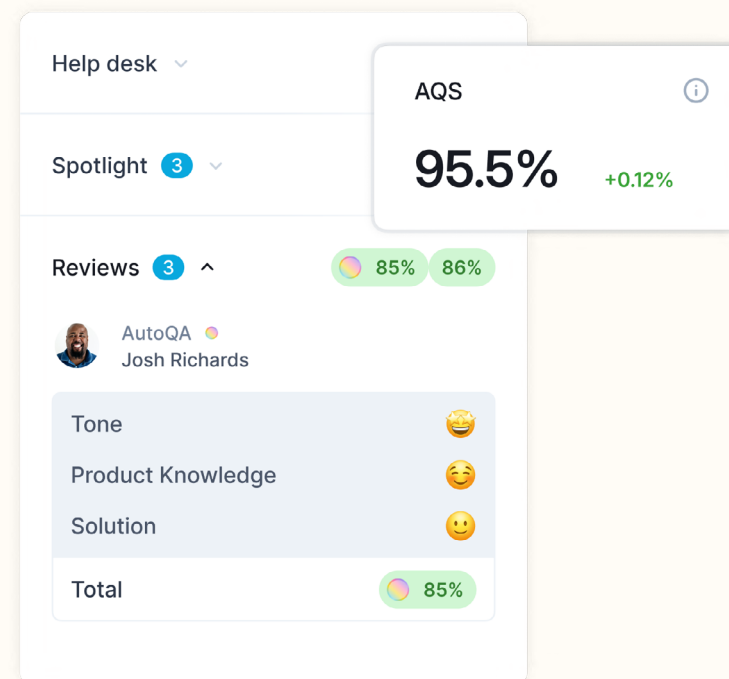
Different scorecards for different teams

Different teams may require different scorecards. Tailor your scorecard to the specific functions and objectives of each team. For instance, a tier 2 support team might prioritize problem resolution and technical accuracy, while a tier 1 customer service team might focus more on personalization and empathy.

Customize your Zendesk QA scorecards to ensure that review data is relevant and aligned with each team's unique goals.

Creating an automated QA scorecard

Automated reviews can be used in two ways: to augment your manual reviews and as a standalone way to analyze 100% of interactions without needing the eyes of a human on your team.



- To aid your manual reviews, add any relevant AutoQA categories to your main scorecard. While AI may not be able to score all categories, seeing the scores it provides for relevant categories can help reviewers form a more informed and unbiased opinion during their manual evaluations.
- Create a new AutoQA scorecard with every automated scorecard category enabled. This means that 100% of conversations will be analyzed by AI in the background of your manual QA processes. This helps you identify trends and training needs without impacting the IQS of your agents.

Who should do reviews?

Different support teams organize reviewer roles based on their team size and structure. Best practices include combining these reviewer options to reap the benefits of multifaceted QA. For example, many teams employ a QA specialist for in-depth analysis through manual reviews, supplemented by automated QA for 100% coverage, with managers conducting several reviews monthly per team member.

QA specialist reviews

Large or growing teams will have a quality specialist or team in place to ensure adherence to quality standards, provide feedback and training to agents, and identify areas for process and performance improvement.

Manager reviews

Regularly reviewing some conversations gives the team lead a ground-level understanding of performance and content for one-on-one meetings. As teams scale, hiring or training a QA specialist is necessary to prevent the manager from spending too much time on reviews.

Automated reviews

AutoQA ensures 100% coverage of all support interactions with consistent, unbiased evaluations. This allows managers and quality specialists to focus on data analysis and improving customer satisfaction.

Peer reviews

Peer reviews complement top-down quality control by increasing team coherence and facilitating knowledge exchange. Periodic peer reviews create a shared understanding of support strategies and unite everyone with a common purpose.

Self-reviews

Self-reviews encourage professional growth by helping agents understand and improve their communication patterns. Trusting agents to evaluate their own performance builds on agent engagement.

AI agent quality assurance

Companies are increasingly leaning on chatbot capabilities to do some heavy lifting in customer support, and your AI agents are not exempt from the necessities of QA.

Just as QA review data feeds your coaching efforts for customer service agents, data from QA reviews of AI agents helps them improve responses also. Feeding AI more data enhances the efficiency and effectiveness of its output. **Ongoing quality assurance for AI conversations safeguards customer satisfaction.** Think of it like a stress test for your chatbot conversation flow.

Given the AI agent prowess for handling high volumes, manually reviewing all interactions is counterproductively time-consuming for your quality team. For this reason, automated quality assurance is your best friend when it comes to chatbot QA.



Using automation and AI to improve your review insights

Letting automated quality assurance cover 100% of support interactions for general data and pattern detection frees up your reviewers to scrutinize conversations that contain greater learning potentials.

“When you want to monitor customer service, the inclination is to want to know everything. But you don’t want or have time to review everything. So when it comes to reviewing, sampling is everything. With Zendesk QA, you have the critical sampling for manual reviews done for you repeatedly, automatically, and effortlessly.”

Mervi Sepp Rei, PhD

Senior Manager, Machine Learning at Zendesk

While many teams simply pick conversations at random, this fails to prioritize complex interactions that provide valuable insights into customer support challenges and training needs. Using random sampling often results in a disproportionate focus on routine or less informative interactions, wasting valuable review resources. You want conversations that fit into the following criteria:

Churn risk

Conversations where customers express a wish to leave, crucial to review and take preemptive action.

Escalation requests

Conversations where a customer requests higher-level assistance, indicating more complex issues or need for immediate action.

Follow-up required

Conversations in which a support agent has committed to future actions, to check in on expectations and accountability.

Positive or negative sentiment

Conversations in which customers have explicitly expressed satisfaction or dissatisfaction, to help you showcase successful interactions or identify specifics for improvements.

Conversations that fit into the above criteria are the needles in the haystack that help you uncover hidden gems of information that would be otherwise buried in your helpdesk.

It is possible to build your own conversation filter to find conversations to review, however,

the setup is time consuming and costly. AI-powered filters can now conduct sophisticated textual analysis to root out the best conversations for manual review.

Zendesk QA Spotlight filter automatically identifies and highlights such conversations, and guides them directly into your review stream. By analyzing patterns and sentiments within support interactions, it understands where high-impact interactions lie. Additionally, it incorporates a custom-made filter called Outlier. Outlier understands the typical characteristics of your support communications, identifying atypical or unusual conversations that deviate from the norm. These must-review interactions are crucial, as their complexities offer valuable learning insights beyond standard issues.

What to expect from AI-powered quality assurance tool

As with many other aspects of customer service, quality assurance benefits have expanded by a significant measure over the last few years. While a decade ago, any companies astute enough to do QA were tracking everything on spreadsheets, tools can now not only automate much of the process, they also offer data that gives leaders a new perspective on how to meet customer expectations. AI-powered tools now open doors beyond conventional QA.

It's not about reacting to bad CSAT ratings, it's about proactively understanding your support team and using precise data to improve beyond customer expectations.



Your quality assurance tool checklist

1. Time-saving automations for QA maintenance

Improving inefficient processes is a priority for **59% of customer service leaders**. Automating the chains that link the process helps any team master excellent service across teams, languages, BPOs, time zones, etc. A quality assurance tool should include the following to eliminate the need for manual maintenance:

- Integrates seamlessly with helpdesk to bring all conversations into the review platform
- Real-time notifications that update agents and reviewers of feedback, review status,
- Review time tracking
- Integrates with your tech stack, for example with a Slack integration and browser extension, to keep communication seamless
- Automate review assignments to ensure regularity of reviews, diverse samples, comprehensive coverage, and clear target tracking

2. Automated quality assurance

Natural language processing and machine learning have advanced to the point where automatic conversation analysis and scoring is available across support quality categories, such as Grammar and Tone. AutoQA allows teams to:

- Automatically evaluates conversations against predefined criteria, ensuring consistent and unbiased assessments
- Achieve 100% coverage of all support interactions for common review categories
- Identify key performance indicators and potential areas of concern without the need for manual intervention

Automated
scoring and
flagging

	USAGE BY CUSTOMERS		SPECIALIST AGREEMENT WITH AI	
SOLUTION OFFERED	88%	2-scale	86%	2-scale
GRAMMAR	74%	2-scale	97%	5-scale
TONE	63%	2-scale	96%	5-scale
EMPATHY	49%	2-scale	96%	2-scale
CLOSING	7%	2-scale	97%	2-scale
GREETING	7%	2-scale	99%	2-scale
READABILITY	7%	2-scale		3-scale
COMPREHENSION	4%	2-scale		2-scale

FLAGGING AND
INSIGHTS FOR:

ESCALATION
15%

EXTRA MILE
39%

FOLLOW-UP
39%

CHURN
2%

3. AI-driven features for advanced quality assurance

Your tool needs multifaceted AI technologies to give your support quality the competitive edge needed to surpass customer expectations. **94% of business leaders agree that AI will be critical to success in the next five years.** The following AI-driven features for advanced quality assurance are becoming essential:

- AI-powered filters for conversation discovery, so your manual reviews cover the most important conversations
- Advanced models that analyze patterns within support conversations
- Sentiment analysis to offer both customer and agent insight

4. Adaptable to your support team structure and goals

A solution that fits your team setup is paramount: no matter the complexity, your software should help you handle quality at scale. Make sure the technology is equipped for your needs with:

- Customizable scorecards that help you define quality relative to team purpose
- Omnichannel compatibility, for example with speech-to-text capabilities to automatically generate call summaries for review purposes

5. Advanced reporting for comprehensive insights

All teams want to be data driven, however to do so they need real-time reporting and dashboards that automatically conglomerate QA data for data literacy. Including:

- Calculation of IQS (Internal Quality Score) on team and agent level
- Calculation of AQS (Automated Quality Score) on team and agent levels
- Automated dashboards with advanced and customizable analytics that help you track performance over time
- Category-specific graphs to pinpoint strengths and weaknesses

6. Coaching incentives

Understanding knowledge gaps is only part of the process, it is critical that a quality management program follows through with improving agent performance. Using QA data to bring your team to excellence requires:

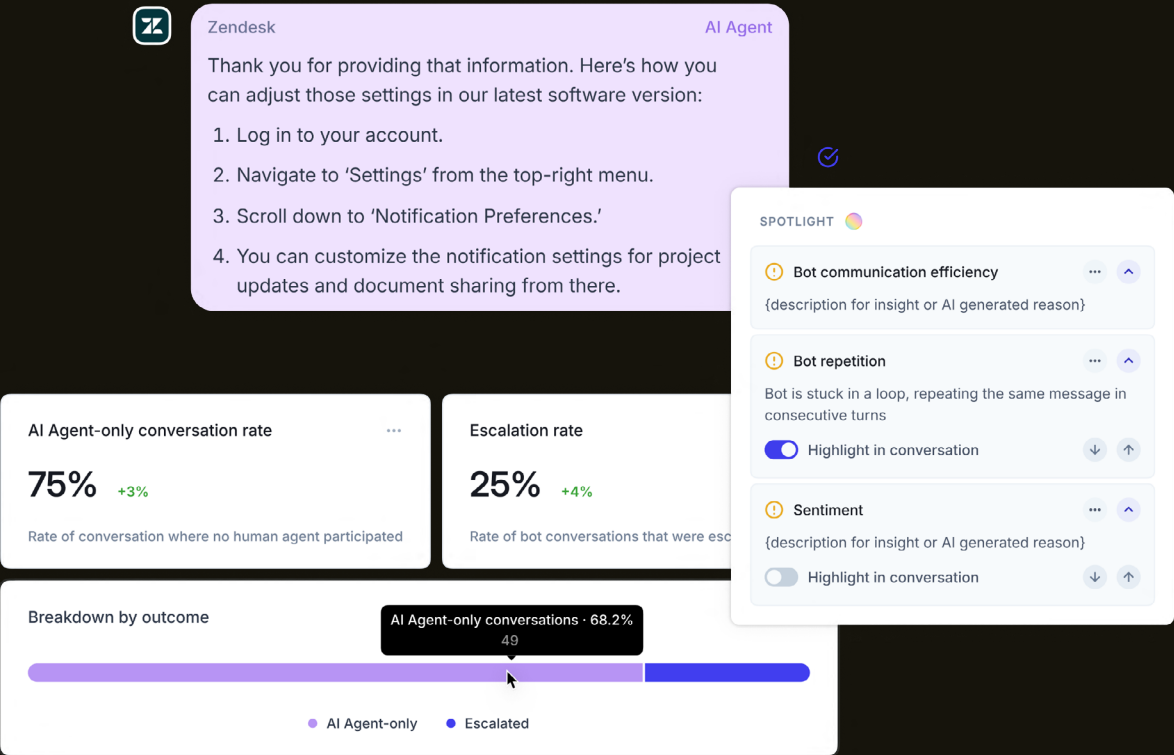
- Sessions integrated within your QA tool where relevant conversations and action points are accessible to trainer and agent
- Agent engagement tools to reinforce learning
- Improvement tracking through individual dashboards

7. Security and Compliance

A top-tier QA tool must prioritize security. This includes SOC2 or ISO certification for robust security standards, SAML/Okta/Google login for secure access, GDPR compliance, and the option for European data storage. User roles should be customizable to tailor access and ensure that only authorized personnel can view sensitive data.

Zendesk QA is a quality assurance software designed to boost your contact center’s revenue through outstanding customer service. It covers all of the above features and more, seamlessly within the Zendesk platform.

Contact sales



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