

The Absence of Bias when Involving Agents in Post Call Survey Requests

November 2003

Executive Summary

This paper illustrates the validity of data collected through an IVR-based post call survey when agents are involved in soliciting customer participation. The issues tested and their corresponding conclusions are noted below:

Issue	Conclusion
Demographic Selection	Customer responses are representative of the company customer demographic
Answer Validity	Customers answer questions truthfully –customer responses are clearly correlated with customer behavior
Bias (agent introduced)	Customer service agents cannot differentially bias results by selectively transferring calls to the system

In addition to illustrating absence of bias, this approach to customer research was shown to be fast and efficient, with customers “delivering” 12,000 responses to 30 agents in the space of four weeks. Twelve weeks were required to compile 1,000 responses using a traditional paper-based survey approach. In this instance, if expenses used to collect the 1,000 paper-based responses would have been used to license the Amae CI Suite during the same time frame, 36,000 responses would have been collected for less money.

Situation

The Amae CI Suite was configured to provide one of five feedback requests, or short surveys, after an agent telephone support transaction via its automated built-in post-call IVR system. Each feedback request comprised of 4 or 5 questions targeting a combination of agent effectiveness, customer understanding of their account terms and generic market research questions. At the same time, a paper-based survey was sent to customers requesting similar feedback.

To properly test the validity of post service call feedback requests, the study was setup to “maximize” the potential for agents to introduce bias. Customer service agents were given total discretion to transfer whichever calls they decided to the Amae CI Suite - maximizing the potential for agent introduced bias. Furthermore, agents were made aware that some of the questions would directly address the service provided on *that call*. The null hypothesis was that the channel was biased.

In fact, the results of the trial demonstrated an absence of bias when agents solicited survey participation. The only bias identified was that of the customer demographic which used the contact center: not surprisingly, more frequent users of the contact center were overrepresented.

The Amae CI Suite processed customer feedback and provided automatic reports to authenticated users in the organization according to their scope or level of responsibility.

Results: Demographic Selection

The first, basic test of the respondents (those who chose to respond to the survey request) was to compare the demographics of the respondents based upon an irrefutable segmentation: the customer’s term.

Not surprisingly, with such a large sample base, the respondents to both the IVR request, and the mail request perfectly matched the entire account base.

The only difference identified does not affect the results, rather the cost of data collection. The IVR request had close to 40x the response rate to the mail request.

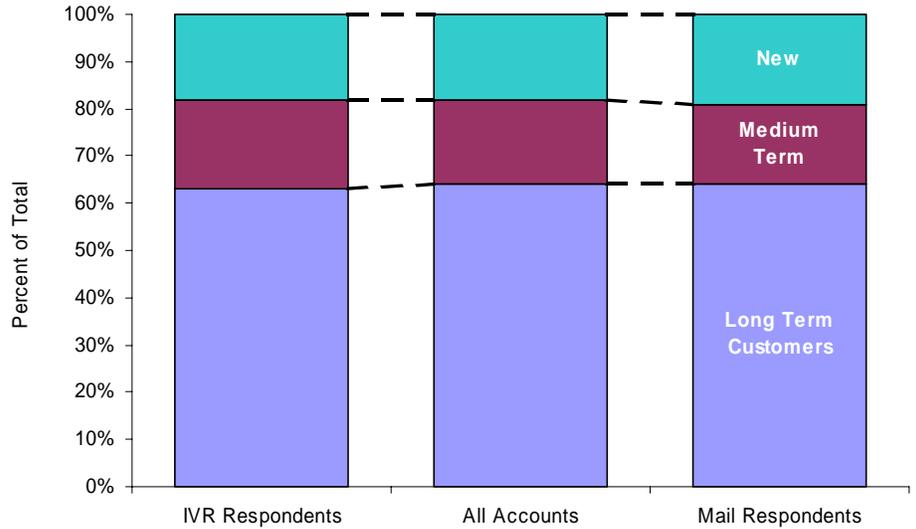


Figure 1: Customer demographics for the IVR survey matched all accounts—so did the mail-based surveys

A second test was to compare the results to a “known” question. The financial institution in this study accurately tracks customer loyalty, and has found that it consistently measures 84% across all customer segments.

Testing this un-bias selector for respondents (those who chose to respond to an acid test loyalty question) against all customer accounts produced the positive result that the loyalty of the responding base matched the entire customer base.

The conclusion is that survey responders are unbiased in their choice to participate in the agent driven feedback request.

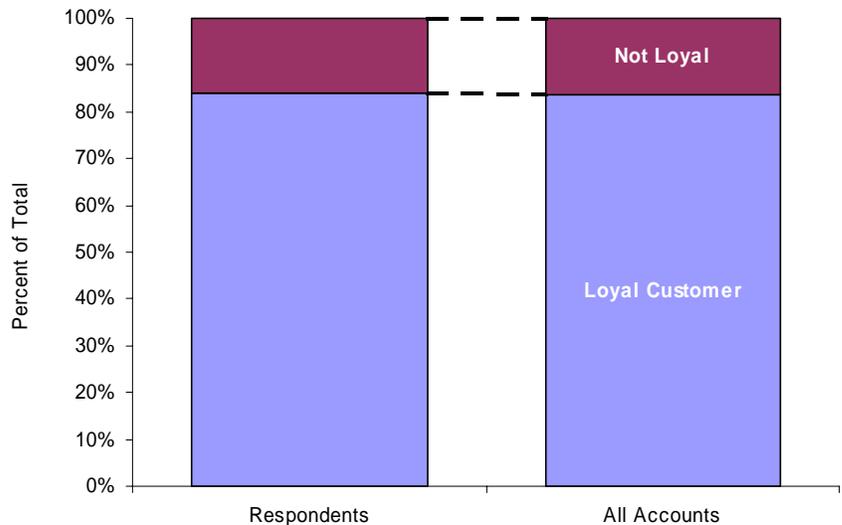


Figure 2: Customer loyalty of respondents vs. entire customer

A third test was performed to test the demographics of the responding customer base. Five of the questions in the trial did not reference the transaction that just took place. The response to these questions were segmented by the frequency with which customers called the contact center (customers were segmented into light, medium and heavy users).

Although slight differences in response to these un-bias questions were noted, the variation was not statistically significant.

This can easily be seen by the tight correlation between question response across customer segment – while the responses to individual question vary significantly.

The conclusion to be drawn is that the demographics of IVR survey respondents, like a mail based survey, accurately reflect those of the entire customer base.

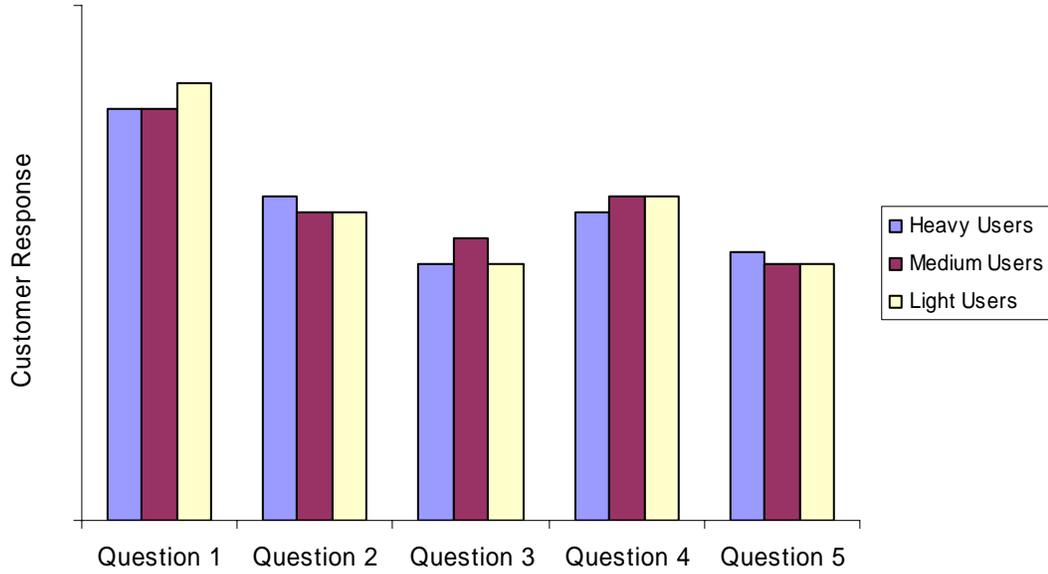


Figure 3: Customer responses to independent questions are not influenced by the level of contact center use.

Results: Answer Validity

To test whether customers answer questions truthfully, a series of questions that explored the customer’s understanding of their account details were asked. The null hypothesis was that customers would “hide” their ignorance to basic questions about their accounts.

If customers succeeded in hiding their lack of understanding, then there would be no correlation between account profitability and their ability to answer these knowledge questions. This proved not to be the case. Customer knowledge was negatively correlated with account profitability.

Indeed, the IVR survey produced better results than the mail based survey – it is assumed customers looked up the answers in the mail based survey, rather than responding directly.

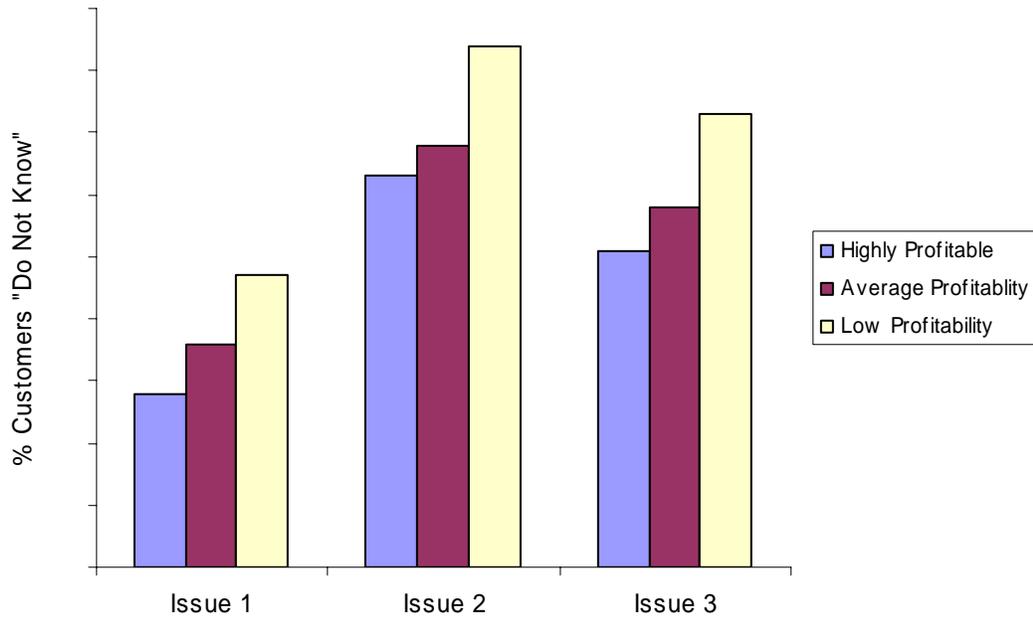


Figure 4 The more customers understand the details of their account, the less profitable they are – this tested the validity of customer responses.

Results: Bias (agent introduced)

Agents were told that some of the feedback questions would directly address the level of service provided by the agent. As expected, agents reacted to this by “cherry-picking” the customers they forwarded to the survey. This produced two results which become valuable for managing agent productivity in terms of the number of calls handled and the quality of service perceived by customers¹:

1. There was significant variation in the number of transfers by agent
2. Overall ratings of agent service show significant variation

It has been demonstrated that agent “selection” of customer respondents does not influence the overall demographic for customer research questions. This leaves the issue of whether having agents directly involved in selecting customers to participate (or not) biases customer responses to agent-related questions. *Unfortunately, there is no objective measure of agent performance in the eyes of the customer – but relative measures are valuable and informative.* Figure 5 demonstrates the variability in customer perceptions of the service provided by specific agents.

¹ Refer to Amae Software white paper titled “Demonstrating the Power of Integrating Real-time Customer Feedback in the Contact Center”

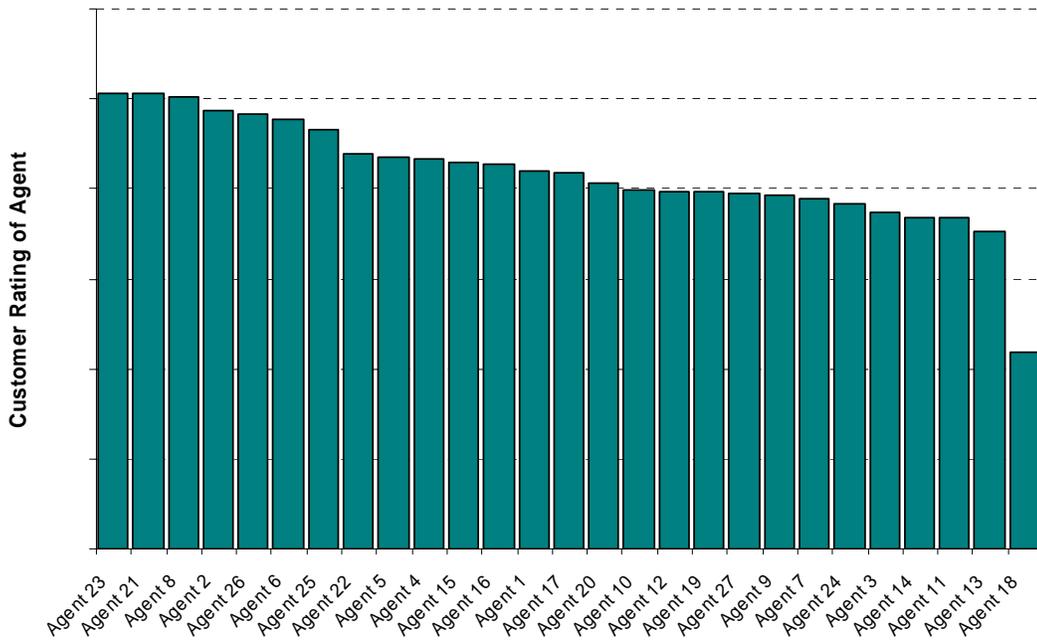


Figure 5: Customer provided ratings of the service provided by each agent in the study.

With customer ratings of agents varying by over 30% of the scale, it is clear that agents cannot significantly influence customer ratings. This is driven by high customer participation rates (over 80% of requests to complete the survey were completed), and the fact that each agent transferred a significant number of customers to the system. Indeed, when this “customer rating” information was presented to the quality monitoring staff and each agent’s supervisor, the results were consistent with internal quality scores and were not surprising.

Summary

A post call survey feedback request is a valid source for customer research:

1. The demographic of respondents mirrors that of the entire customer base
2. Customers respond truthfully to IVR based surveys
3. Even when a trial is setup to allow agents to influence survey responses, agents cannot differentially influence what customers say.

Combining these facts with the low cost of implementing the Amae CI Suite’s built-in IVR survey system, customers’ preparedness to respond, and the speed with which information can be collected and results collated – the Amae CI Suite presents a viable, cost effective, and very efficient channel for collecting information from your customers.

Please contact us for a demonstration of the benefits and capability of the Amae CI Suite via www.AmaeSoftware.com or directly by telephone at (650) 965-0820