The Ultimate Guide to CX QA Scorecards

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Consumers expect more from support teams than ever before. Research from American Express and Harris Interactive shows that customers tell *fifteen* other people about bad support experiences, and *89% of consumers* have switched brands because of bad support.

But the way brands measure support is outdated. Metrics like AHT and FCR measure efficiency, but a speedy interaction isn't always a good one. Similarly, CSAT can capture sentiment, but it's static. The main problem? None of these metrics give teams actionable insights into how to improve support operations or the quality of interactions.

Teams are now turning to QA scores to get the information they need—putting their QA scorecards front-and-center.

With that in mind, we put together this guide to answer all of your scorecard questions. It's based on our experience helping hundreds of support teams build quality programs.

You'll find guidance on building your first QA scorecard, how to know when it's time to modify an existing scorecard, and tips and tricks from our customers who have gone through this process before.

What is a QA Scorecard?

A quality assurance scorecard is a rubric against which a QA analyst, team lead, or manager grades an agent's customer interactions with a customer to ensure they are in alignment with their brand's standards, rules and regulations, and more.

Most **quality assurance scorecards** are a collection of customer service values and procedures that are presented as questions to the grader.

Real-World Example

Company: **MeUndies**, makers of comfortable underwear, loungewear, and apparel

Industry: Clothing & Apparel

MeUndies asks its graders to assess how well agents personalize their responses to customers—something that sets them apart from competitors on the CX front. They use checkboxes to provide graders with complete flexibility in determining which personalization tools were used.

Did the agent create a personalized customer response that was applicable to the customer's inquiry?

Subtract the points indicated by each box selected.

- ☐ Brand Voice (4 points) ✖
- ☐ Personalization (2 points) ✖
- ☐ Empathy (1 point) ✖
- ☐ Macro (1 points) ✖
- ☐ Visual Aids (e.g. screenshots and attachments) (1 point) ✖
- ☐ Gifs or Emojis (1 point) ✖

⊕ Add Option

Tip: Linear point scales, yes/no dropdowns, and short answer fields are also commonly used in QA scorecards. These help your graders move faster and provide consistent feedback.

Why You Need a QA Scorecard

QA scorecards accelerate your ability to analyze interactions at scale and surface new insights around the customer experience that traditional metrics can't provide.

Here's what motivated several well-known companies to get serious about their scorecards.

The Need for Structure at LevelUp

LevelUp instituted a QA scorecard to provide a framework (and data!) for coaching their agents. Previously, no such scorecard existed, and agents on different teams would receive different coaching experiences depending on who their manager was. Implementing a QA scorecard standardized the agent feedback and coaching process and simplified LevelUp's ability to compare agent performance for promotions and raises.

The Need for Accountability and Visibility at WP Engine

Managers at WP Engine had to grade agent interactions on top of their many other tasks. As a result, they regularly fell short of their grading targets.

The CX leadership implemented a QA scorecard that boosted grading efficiency and provided transparency on a manager's progress on their grading goals.

This new scorecard also provided managers with visibility into agents' engagement with assigned training modules on their knowledge management program. Through QA, the team at WP Engine built a high-trust environment where everyone thrives.

The Need for Efficiency at GetUpside

Downloads of GetUpside's cashback app skyrocketed, but the CX team couldn't grow at the same pace.

The team doubled down on its in-house CX team and implemented a QA scorecard to help spot and correct inefficiencies in their processes. As a result, the team eventually brought response times back to pre-growth spurt rates and then exceeded their targets!

Now that you're sold on scorecards, we're going to dive into how to build one, how to use it for grading, and more.

How to Build Your QA Scorecard

There are **five key steps** you and your team need to do to build out a QA scorecard that works for your unique business and brand needs.

- **Step 1:** Identify the values that drive your customer interactions
- **Step 2:** Create & refine scorecard questions
- **Step 3:** Organize your questions into a framework
- **Step 4:** Pick your QA scorecard tool
- **Step 5:** Test out your scorecard

Our Values	Our Operational Goals
Effortless Experiences	AHT < 10 mins
Customer Delight	85% Customer Retention Rate

STEP 1: Identify the Values and Goals that Drive Your Customer Interactions

Your customer-facing team is the most frequent human point of contact that a customer has with your brand—it's essential that they embody your brand' values.

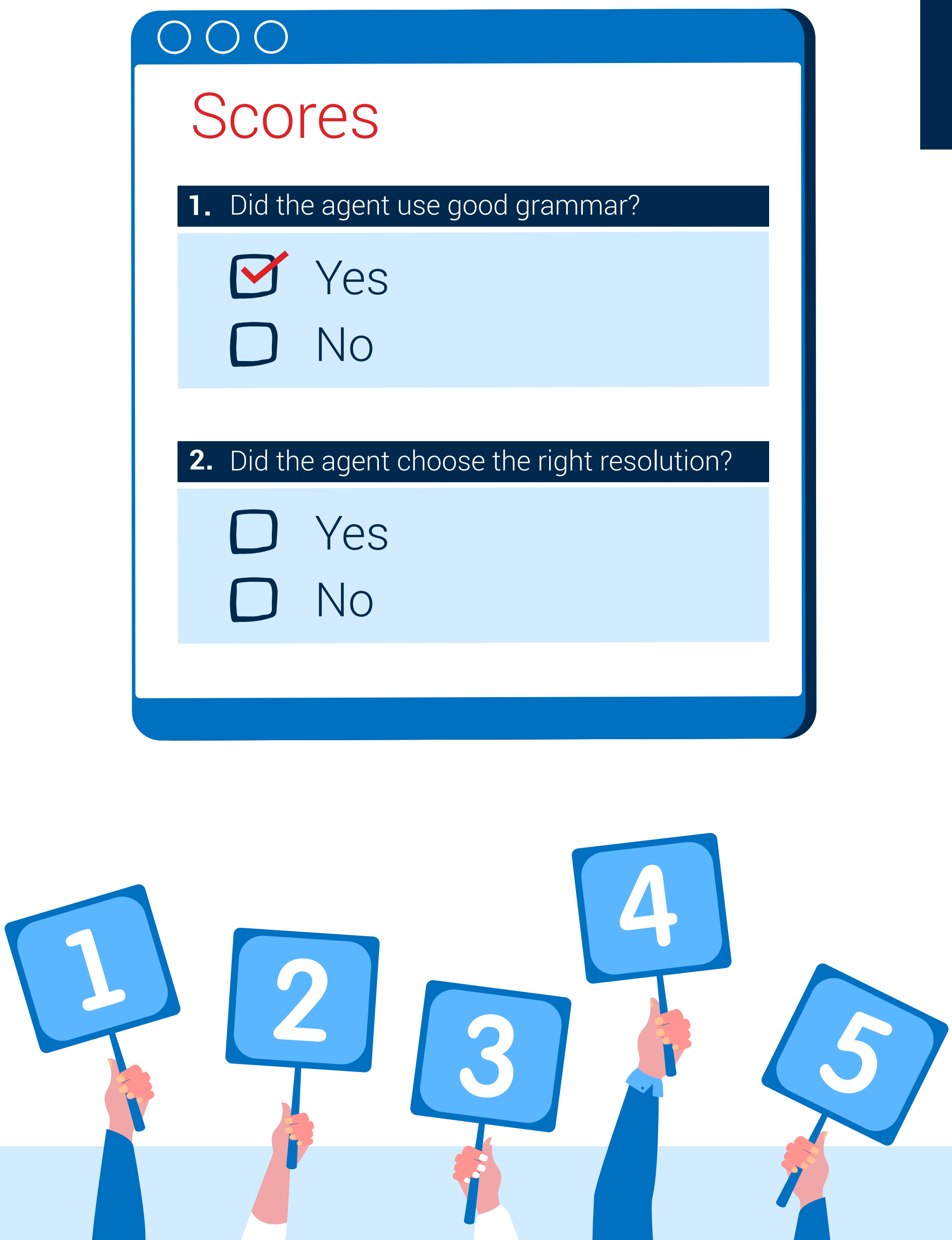
On a whiteboard or piece of paper write **"Our Values"** on the left side and fill it up with the values that drive your customer interactions. A good place to start would be your company and brand values, as well as any extra values that are specific to the support team.

On the right side, write: **"Our Operational Goals."**

For example: Is First Contact Resolution rate an important part of your customer experience? Add that on the right side of the list. Are you aiming for your agents to deliver a certain number of interactions per hour? Pencil it in.

To round it off, spend time listening in on customer calls and speaking with agents. These interactions will help you to identify the pain points customers and agents face as well as potential opportunities to improve.

Tip: Try to find common themes across your Goals and Values—these will be key to formulating your scorecard questions in the next step.



STEP 2:

Create & refine scorecard questions

Next up, you need to write the questions that will make it into your scorecard. Not sure what to include? Here are four common questions along with a few things to consider when adding them into your QA scorecard.

Did the agent use good grammar and an appropriate tone of voice?

Let's start with an easy one. Good grammar and a friendly tone of voice (or one that matches your brand values and experience) are essential for any customer-facing team—regardless of whether your agents provide email, chat, or call support.

Did the agent identify the root cause and tag the ticket correctly?

This question helps you confirm that the agent understands:

- Your tagging system and how to use it.
- Your product and how to discern the interaction's root cause for delivering an appropriate solution.

Did the agent select and appropriately modify the right macro?

Macros exist to help agents be more efficient when answering tickets. Instead of typing out replies to every question, agents can use macros to answer frequently asked questions in one click.

Although extremely beneficial, macros are not appropriate for every customer interaction. Using the wrong macro could lead to awkward customer experiences and could even create more work for the agent. Customizing a billing macro to answer a shipping question might be more trouble than it's worth—and agents should know that.

Did the agent choose the appropriate resolution to the customer's issue?

Being able to read the nuances of each case and select the right resolution is a skill that comes with experience. Including this question in your scorecard helps you identify agents who are still building that skill. It also gets at the heart of the interaction by assessing whether the agent did the right thing, while also weighing internal protocols against what will actually make the customer happy. Other metrics like CSAT or NPS would not provide this level of detail into the customer experience.

STEP 3:

Organize Your Questions into Your Scorecard Framework

As you develop questions to include in your QA scorecard, you may notice that some share common characteristics. That's normal, as most questions fall into one of four categories—communication skills, customer connection, compliance and security, and correct content.

One way you can organize your scorecard is by grouping questions together around these categories.

Communication Skills

How well do your agents communicate? For phone conversations, you might want to evaluate tone of voice, pace of communication (e.g. talking too fast or slow), or the excessive use of filler words (e.g. um, ah, and mmmmkay).

For text-based channels, grammar and spelling are critical for communicating clearly, concisely and in a way that's on brand. The messaging should also look good visually, which means paragraphs should be broken up logically with proper line breaks.

Customer Connection

Do agents make a real connection with your customers? Do these interactions provide customers with experiences that differentiate your brand from the other companies?

Some common points of connection that make it into scorecards are:

- Greeting customers warmly and using their names wherever possible
- Listening carefully, acknowledging issues, and repeating back what was heard to ensure everyone is on the same page
- Responding empathetically to the customer's mood and tone
- Communicating a willingness to help and taking ownership until the situation is resolved

Compliance and Security

Do agents follow all essential policies and procedures to keep the customer and the company safe? Do they handle PII in the right way and protect the log-in information of customers?

Security is a critical component of quality review. At a minimum, security means properly authenticating customers before disclosing or changing information on their accounts. Depending on the industry, you'll often hear acronyms like PII, PCI, and HIPAA.

Failure to comply with these regulations reduces trust with customers and could result in significant legal problems for your company, so it's wise to make sure agents are regularly graded on compliance and security.

Correct and Complete Content

Do agents provide correct and complete answers and use the right tools to arrive at those answers? Are all internal processes followed?

Providing wrong or incomplete answers defeats the purpose of having a customer service team. After all, customers reach out to gain access to information that will solve their specific challenges.

When customers receive bad information, they'll either lose confidence in your team or call back again in the future—leading to unnecessary spikes in call volume.

Some companies prefer the "pillar" framework, which aligns questions around the following three pillars:

Soft Skills

Things like tone, understanding context, and empathy go here. Companies may also add elements such as friendliness, humanity or going the extra mile to ensure a great customer experience.

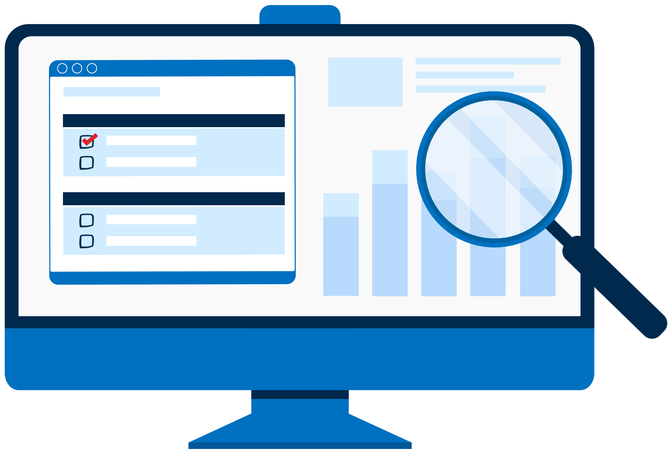
Issue Resolution

This pillar can be as simple as asking a Yes/No question: Did the agent resolve the issue for the customer? It can also involve questions with a linear sliding scale (i.e., from 1 point to 5 points) to capture the nuances of each customer interaction or to reflect a particularly technical or complex interaction.

Procedure

Did the agent properly follow internal procedures? We often see checkboxes for this section, which make it easier for a QA analyst to tick off each requirement as it is met.

Tip: Both frameworks provide an excellent starting point. (And, there's plenty of overlap between them!)



STEP 4:

Pick a QA Scorecard Tool

There are two basic tools you can use to create a QA scorecard:

1. Spreadsheets

vs.

2. QA software

Spreadsheets are often the starting point for smaller teams or teams building out their first QA program. While they may work in the short term, they don't scale with teams as they grow.

We built MaestroQA to help CX teams go beyond spreadsheets. In fact, many of our customers who switched from spreadsheets have experienced significant increases in efficiency and CSAT scores. Here's Clever's story:

Real-World Example

Company: **Clever**

Industry: Education

Clever's QA program was built on Google Sheets and Google Docs, which created a variety of administrative bottlenecks. "Between matching the Google Sheets and Google Docs, servicing that to managers, sharing it with individuals, it was just such a mess," said Natalie Mercuri, QA + Learning and Development Lead at Clever.

Grading five tickets took at least ninety minutes of work—not including the feedback sessions. Switching to MaestroQA provided one platform for all things QA and accelerated the grading process.

Grading five tickets with MaestroQA only takes 30 minutes—a 67% improvement compared to spreadsheets.

"Having a tool power your QA program will pay for itself tenfold within the first week," Mercuri said.

STEP 5:
Test your scorecard

Your QA scorecard needs to work for all of your graders, managers, and agents. That's why properly testing your QA scorecard is a key step for ensuring a successful rollout. Consider these best practices when testing:

Assemble a Small User Group

Form a team that will test the new scorecard. When selecting team members, look for stakeholders who are familiar with your CX goals and willing to provide constructive feedback. Then, agree on a methodology for using the new scorecard. If this is your company's first QA scorecard, graders could immediately begin using it to assess all tickets during the test period. However, if you're replacing an existing QA scorecard, you will need to decide on how many tickets should be graded with the new rubric vs. the old rubric.

Remember to keep agents in the loop, too. Reassure them that any tickets graded with the new rubric are for testing purposes only and will not influence their KPIs.

Make It Easy for Team Members to Share Feedback

Create a dedicated Slack channel to collect real-time feedback from graders. Encourage graders to post anything about the new scorecard that seems unclear, time-consuming, or misaligned with your values and policies.

Calibration sessions—meetings that get all of your graders talking about the new scorecard—are another great way to solicit feedback and identify potential issues. To maximize the impact of each calibration session, use your new scorecard to grade one or more tickets prior to the meeting. Compare your grades to those of other graders and then use the meeting as a forum for overcoming misalignment.

Put Your Scorecard to the Test

Three to four weeks of focused testing should be an adequate amount of time. That said, wrapping up testing in the least amount of time is not the primary objective. What's more important is ensuring that graders understand each question and that your new scorecard is an effective communicator of feedback.

Tip: **Workflow automations** in MaestroQA can accelerate the testing process by simplifying the assignment and grading of tickets.

QA Grading

Creating your first QA scorecard is a major milestone. But, once it's finished, there's more work to be done.

Top performing QA programs rely on a formalized grading cadence, which includes deciding who should grade tickets and agreeing on a fixed grading volume and frequency.

Decision #1: Do You Need Dedicated QA Specialists?

After building your QA scorecard, you need to decide who's going to be using it. This decision usually boils down to a few factors: size of your team, human resources available, and team maturity.

Benefits of QA Specialists

In our experience, most teams hire dedicated QA specialists to run their QA programs and perform grading. This allows managers to focus on other key tasks,like hiring, coaching, and onboarding. Dedicated QA specialists give their undivided attention to grading agents, interpreting the data produced, and providing trusted CX insights for improving CSAT, reducing churn, and maintaining a positive brand reputation.

And, since they aren't directly in the queue, QA specialists provide a fresh, third-party perspective on issues that inevitably pop up during grading.

Not all teams are large enough to need a QA specialist, and some don't have them. The alternative is to have managers, team leads, or senior agents double up to do QA. It's a great way to train senior agents on a new skillset and provide an opportunity for career progression. This is where team maturity comes into play—you need to have some established veterans on the team to help grade.

That said, team leads, managers, and senior agents are busy. Between onboarding, hiring, coaching, reporting, and answering tickets, setting aside time for QA might fall off their radar. When this happens, agents are the ones who ultimately miss out on coaching and training opportunities.

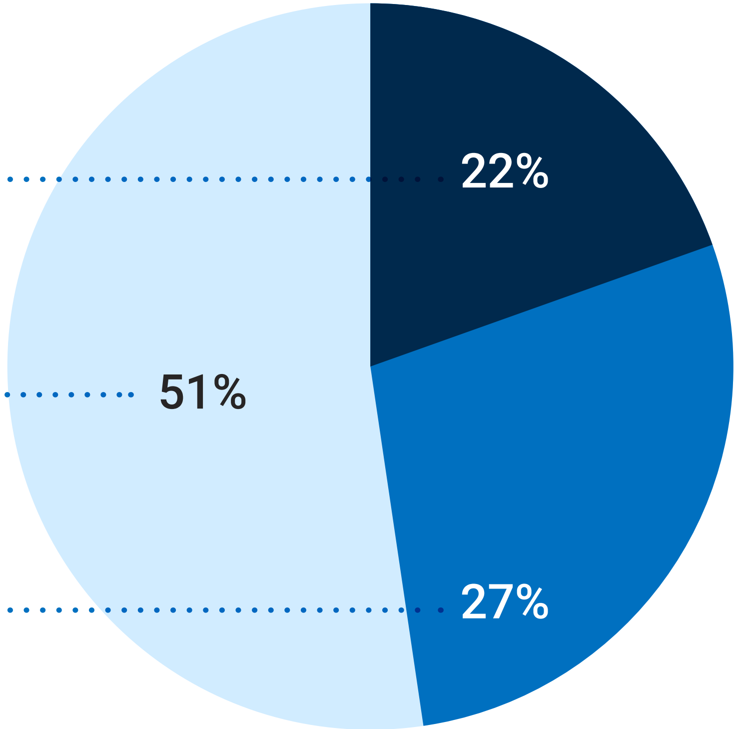
Finding the Right Mix

We asked our CX network about their grader-to-agent ratios and found that most teams have a ratio of roughly 1:20. Here's a more detailed breakdown:

22% of teams have a grader-to-agent ratio of **1:10**

51% of teams have a grader-to-agent ratio of **1:20**

27% of teams have a grader-to-agent ratio of **1:40** agents or more



In general, larger teams tend to have more agents per grader. As the team matures and builds a base of senior agents who require less grading, they shift their energy to newer agents.

Decision #2: How Often and How Much Will You Grade?

Next, you need to decide how many tickets need to be graded, and how often grading should happen to hit that goal.

60% of MaestroQA customers grade between 1% to 5% of all interactions. The other 40% grade at least 5% of all interactions, but these tend to be smaller companies with a dedicated QA specialist on the team.

There are 3 main factors that determine how frequently you should grade—your CX team's resources, your queue's average ticket difficulty, and how senior your agents are.

1. CX Team Resources

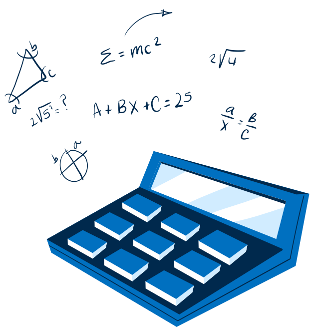
If you're relying on team leads to handle QA, you might want to lower your grading volume to allow for their other responsibilities.

With dedicated QA specialists, it's easier to work out realistic QA goals. We like using a percentage of tickets to set a grading goal, because it works for any size team.

Example: let's imagine that your team consists of 10 agents and 1 grader. The team handles 5,000 tickets per week, and you'd like to grade 5% of tickets.

5% of 5,000 tickets = 250 graded tickets per week

Using simple math, your grader needs to grade 50 tickets per day to hit the goal.



We encourage an iterative approach to determining grading volume—try this goal for one week and see if your grader can reasonably achieve it. If they can handle more tickets without compromising grading quality, increase the goal. But if 50 proves to be too much, consider setting the bar a bit lower than 5%.

2. Average CX Ticket Difficulty

If the majority of tickets in the queue are easy to handle, choosing random tickets to grade might not provide the insights that you truly need. Put simply, if a majority of your tickets are "easy", the more "difficult" (error-prone) tickets that require more agent knowledge will be graded less often based on a random sample of tickets.

Here's how MaestroQA customers, Handy and WP Engine, have moved beyond random ticket sampling to overcome this issue.

3. Agent Seniority

Most companies that track QA data come to realize one common truth: agent performance increases with experience. The main way to account for this is to set a minimum threshold score for grading.

- When you set the minimum threshold score (for example, 85/100), consider lowering the grading volume and frequency for the senior agents who have consistently maintained an 85+ QA score. This will allow you to focus more time and effort on newcomers, while building trust with senior agents. QA software should be able to help you group agents based on their seniority or even select tickets for grading based on their CSAT score.

- Taking it one step further: involve senior agents in setting the minimum threshold score. This approach gives senior agents ownership over part of their coaching program and provides new opportunities for growth.

Real-World Examples

Company: **Handy**

Industry: Home Services

The team at Handy only grades DSAT tickets—tickets that either have negative CSAT scores or those flagged by agents because they struggled with an interaction and want a review. This allows the tickets with the most opportunity for learning to float to the top, leaving Handy with the best possible insights to improve their training and CX programs.

Company: **WP Engine**

Industry: Web Hosting

WP Engine has a hybrid program. They filter every DSAT ticket out for grading but maintain a separate QA instance that randomly selects tickets to grade. This allows the company to reap the same benefits as Handy's program, while ensuring that the general performance of the CX program is maintained.

Feedback & Reporting

To maximize the impact of your QA scorecard, you need a scalable way to collect, aggregate, and distribute meaningful feedback and insights to agents, managers, graders, and the rest of your CX team.

Relaying QA Results to the CX team

There are three main ways to relay your hard-earned QA scores to your team: email notifications, coaching sessions, and team meetings.

1. Email Notifications

Some QA platforms allow agents to receive their scores via email immediately after the grade has been submitted by the grader. This enables real-time feedback that the agent can apply to the queue, while staying engaged with the QA program.

Agents shouldn't be left to interpret their QA scores on their own, however. This method should be paired with regularly scheduled coaching sessions.

2. Coaching Sessions

Coaching sessions provide managers with an opportunity to analyze each agent's long-term results and offer qualitative feedback.

After all, the numbers don't care about an agent's feelings—but managers do. Coaches can help reframe QA results and put them in context. For example, a below-average score could be due to a recent product launch or a one-off event rather than a long-term trend.

Most teams aim for one coaching interaction per agent per week. This number can be decreased over time for more senior agents.

3. Team Meetings

Team meetings are used to dig deeper into the QA data, identify trends, and proactively address localized issues before they become widespread.

Mailchimp uses team meetings combined with a QA newsletter for this purpose—and they always experience a positive spike in QA scores for the highlighted section of the rubric.

Reporting on Scorecard Data

Aggregating your QA data into reports and dashboards makes it easier to evaluate the effectiveness of your QA scorecard from several perspectives:

Grader Efficiency

How many tickets can your graders grade per hour, day, or week? Are your graders becoming more or less productive over time? What factors are influencing the trends that you see? If you've made adjustments to your QA scorecard, how does grader efficiency compare now vs. before the change?

Quality of Insights

How reliable is the information that your QA scorecard generates? Is there a scorecard-related issue that is causing graders to misgrade certain types of interactions?

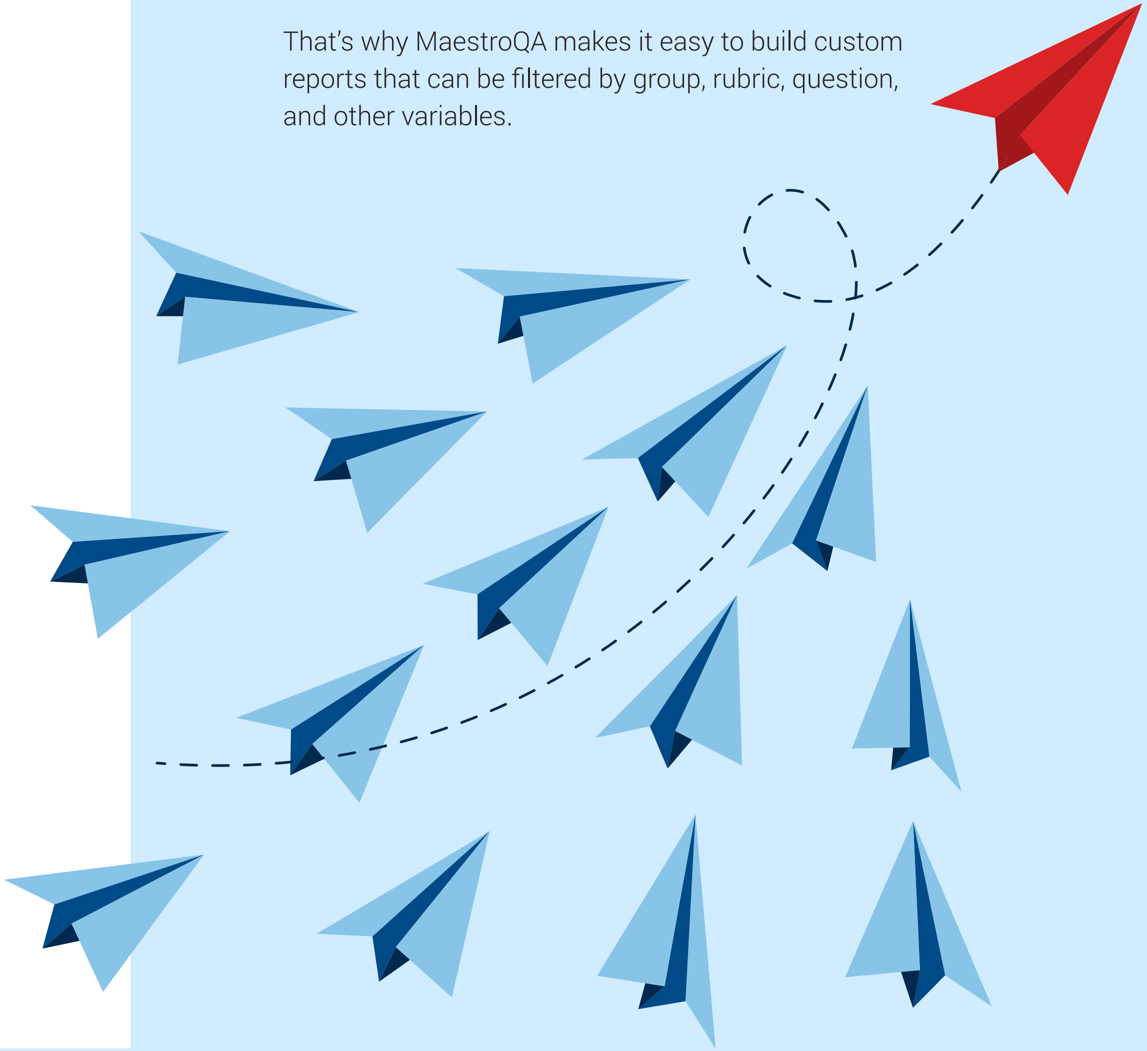
For example, let's say that a QA report surfaces that agents consistently score low marks on refund-related interactions. Are agents being graded too harshly for relaying the refund policy itself (which is outside of their control)?

If so, a scorecard adjustment, procedure adjustment, and/or additional training could be warranted to remedy the artificially low QA metric.

Scalability

Standardized reports can only tell part of the story. To gain meaningful QA insights at scale, you need the ability to slice and dice your QA data across a variety of agents, teams, helpdesk tags, and scorecard criteria.

That's why MaestroQA makes it easy to build custom reports that can be filtered by group, rubric, question, and other variables.



Making Adjustments to Your Scorecard

Because QA scorecards represent a snapshot of your company's values, CX processes, and communication style, they must be updated frequently to ensure they're still aligned with your ever-evolving brand and CX goals.

When to Re-evaluate Your Scorecard

At a minimum, you should **re-evaluate your scorecards every 6 months** to ensure constant customer service quality. That said, there are several key events that should prompt an automatic re-evaluation.

1. Updated Brand Values

QA scorecards represent your company's values. When your values change, your scorecards should change, too.

For example, the communication section of your scorecard may regulate the use of certain words, such as referring to customers as "members," or check for a friendly tone of voice. These practices may change as your brand matures and evolves. As such, a brand refresh or the launch of a revised brand values handbook is a good opportunity to re-evaluate your scorecard and confirm alignment.

2. A Push for Increased Efficiency

It could be a new C-suite hire or a company-wide call to do more with the same resources. Whatever the trigger, a push for increased efficiency is something that most teams go through at some point.

As the backbone of your QA program, your scorecards are a good starting point for increasing your grader and agent efficiency.

3. Fewer CX Insights Observed

Trustworthy CX insights are the primary goal of any strategic QA program. When these insights start to dry up or are less impactful, it's time to re-evaluate your QA scorecard.

The "insightfulness" of a QA program is not easily measured, but experienced CX managers know when their QA programs are not delivering the same level of insights and when it's time to switch things up.

4. Signals from QA Data Indicate Scorecard Staleness

Your QA data can also provide powerful signals for determining when to re-evaluate your scorecards.

A few indicators to keep your eye on:

Stagnant QA Scores: Handy's CX team also noticed that their agents consistently scored in the high 90s. While some might see this as cause for celebration, they decided to dig deeper into their scorecards and settled on grading only tickets with negative CSAT scores.

MeUndies noticed a similar trend and realized that stagnant QA scores were leading to flat CSAT scores—and lackluster customer interactions. They decided that a revamp was in order.

If you're a team that's constantly scoring high and wondering how to gain more QA insights, this approach might be worth exploring.

But, if your team's average QA score is in the mid-70s and showing no signs of improvement, shifting the goalposts is less likely to be beneficial.

Increase in Agent Appeals: When an increasing number of agents appeal their grades, it can mean that your scorecard is misaligned with agent training and procedures.

Graders Missing their Grading Targets: If graders are missing their grading targets, there might be an efficiency issue with your scorecards. They might be structured in a way that's difficult to interpret or have too many questions, which leads to long grading times.

Real-World Examples

Company: **Handy**

Industry: On-demand Home Services

Handy's CX leadership team realized that their QA program was no longer delivering insights that the team could use to improve their program. Further investigation revealed that the sheer volume of simple, easy-to-handle tickets was crowding more complex, error-prone tickets out of the grading queue, causing Handy to miss out on opportunities for improvement.

Handy's CX team decided to only grade tickets with negative customer satisfaction scores. As a result, they were able to pinpoint opportunities for improvement on complex tickets and drive performance improvements.

Tip: Revamping your scorecard based on stagnant QA scores is essentially shifting the goalposts. New data can't be directly compared to the historical, pre-shift data.

Tip: If you don't have dedicated QA specialists and managers are pulling double duty to grade, that could be the real reason behind missed targets.

How to Revamp Your QA Scorecards

You've seen the writing on the wall, and you know it's time to revamp your scorecard. Rather than start building a new scorecard from scratch, use these five steps to scope out the project and get to the root of your scorecard issues.

Step 1: Get Insights from Stakeholders

Speak to all relevant stakeholders in the grading process including your CX managers, QA specialists, and agents. Agents and QA specialists have the most interaction with your scorecards and would probably have the best insights on how to improve them. They'll also be the most affected by a QA scorecard that isn't delivering value, so their happiness with the scorecard is a good indicator of how it's performing.

Tip: Ask graders what they prefer. Learn about their workflows and needs to craft a scorecard that works best for them.

Step 2: Look for Ways to Simplify Your QA Scorecard

Eliminate Questions: Try to reduce the amount of questions or steps in your QA scorecard. If a question is not delivering insights or is no longer an area of concern, consider removing it. Eliminating just one question can have a measurable impact. Let's say that you grade 500 tickets per week, and each question requires 10 seconds to grade—that's 83 minutes per week for just one question! If a question isn't providing the insights you need, cut it

Reorganize Your Scorecard: Next, reorganize your scorecard. One efficiency hack that you can try is to group similar questions together. For example, questions like "Did the agent greet the customer?" and "Did the agent ask if there were any other issues before ending interaction?" could be grouped together because they deal with similar procedures.

Alternatively, you could space questions out throughout the scorecard to follow the flow of a customer interaction. The question about greeting the customer would be at the beginning of the scorecard, and the question about solving other issues would be at the end.

Use Integrations: Integrations provide another opportunity to decrease grading time. For example, MaestroQA's integrations with CX platforms like Zendesk and Aircall allow graders to view scorecards and tickets side-by-side, eliminating the need to switch between screens. Integrations with learning management systems like Lessonly and Guru make it easy for graders to quickly assign knowledge base articles to agents who need help.

Tip: Grouping similar questions together might be better if your customer interactions are relatively short and quick, but, for longer interactions, you might want to try the second approach.

Step 3: Re-examine Company Values and Policies

If you're updating your scorecard to align with new brand values, make sure that these values are unambiguously infused into the scorecard.

SeatGeek, the world's largest online event ticket search engine, has done a good job infusing brand values into its scorecard. When the value of "humanity" was added to the company's brand values, the QA team created a specific humanity section in the scorecard and included clear parameters for getting a perfect grade.

While you're evaluating your scorecard for brand values, you can also check for any policy changes that have been made since the last update. This might include updates to your security, identity verification, or refund policies. Like brand values, policies should be stated on the scorecard and unambiguously communicated to agents to ensure adoption.

Step 4: Ensure that Your Scorecard + QA Data is Easy to Interpret

Make your QA results easy to access and interpret. Doing so will ensure maximum engagement with your QA program and provide agents with necessary insights for improvement.

eCommerce marketplace Mercari had a QA program with a passing grade of 96%, which meant there were only 4 percentage points between perfection and failure. Agents struggled to understand the program and felt that it was both extremely rewarding and punitive. Mercari revamped the program to feature a 5-point scale with an accompanying scorecard, making QA results a lot easier to understand, which led to increasing agent engagement.

Another way to make your QA data easy to interpret is by removing subjectivity from your scorecards.

You can do this by utilizing quantifiable feedback mechanisms—like checkboxes or Yes/No questions—instead of open-ended written feedback (which should be used to supplement or give context to those grades).

This allows grades to be easily compared across time periods—it's clear for an agent to see that their performance has improved by 10% when their QA score increases from 80% to 88%. On the other hand, it's hard to compare performance improvements based on subjective, written feedback.

Step 5: A/B Test Your Scorecards

Be sure to thoroughly test any changes against an older version of your scorecard. If you grade 100 tickets per day, try grading 50 with the old scorecard (A) and 50 with new scorecard (B) and then compare the experience and results.

If you're trying to decrease grading time, consider tracking how long it takes to grade the tickets in scorecard A vs B. If your new scorecard provides a significant efficiency improvement and you're still gleaning high-quality insights, you have a winner!

Repeat this process for all changes that you'd like to make. You may not always see sizable improvements, but taking an incremental approach is the best way to know that your changes are having an impact.

Better Scorecards = Better Outcomes

Your scorecards can make or break your QA program—there's no better time to build your first one or iterate on one that already exists.

While there's a lot to consider in the process, we boiled down into two handy checklists to help you get started.

Checklist: How to Build My First Scorecard

Identify the Values that Drive Your Customer Interactions

Make a list of both brand values and operational goals that your team needs to hit.

Create & Refine Scorecard Questions

Draft questions based on steps 1 and 2—or pull from our list of ideas.

Organize Questions Into Your Framework

Make sure graders don't have to jump around too much in interactions—follow either a chronological or thematic question flow.

Pick A Scorecard Tool

Decide where you're going to host your scorecard for grading—a tool like MaestroQA can help!

Test Your Scorecard

Test your scorecard with a small group to ensure it helps you achieve your goals.

Checklist: How to Redo My Scorecard

- [ ] **Get Insights from Stakeholders**

  Consult leadership, graders, and agents to ensure you're aligned on the insights needed from scorecards and make note of existing issues.

- [ ] **Look for Ways to Simplify Your QA Scorecard**

  Depending on the issue you're trying to fix, you may need to eliminate or reformat questions to provide more structured data, or to make your grading process more efficient.

- [ ] **Re-examine Company Values and Policies**

  Make sure your scorecard aligns with company values, policies, and brand identity.

- [ ] **Ensure that Your Scorecard + QA data is easy to interpret**

  Check that your scorecard's output is clear and easy to understand.

- [ ] **A/B Test Your Scorecards**

  Test your changes against your old scorecards, making one change at a time, to determine the impact of these changes.

Want more scorecard help? We're always here for you.

Tweet us @MaestroQA and we'll answer any of your scorecard questions.

MaestroQA makes omnichannel quality assurance software for modern support teams. Etsy, Mailchimp, Peloton, Zendesk, and more use MaestroQA to improve agent performance, optimize CX processes, unlock business-level insights, and enable amazing customer experiences—all while improving the metrics that matter like retention, revenue, and CSAT.

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