



Quality Management System Toolkit, Part 3

Quality Control, Fundraiser Support Interviews

Executive Summary

The Fundraiser Support Interviews are a custom UNICEF-designed process to support fundraiser development and impact the quality of their fundraising. Developed and tested in markets by F2F specialists, the FSIs provide extra insight compared to traditional mystery shopping techniques.

FSIs allow a broader scope of testing knowledge, testing in different sub-channels, and can be more cost-effective than mystery shopping as F2F skilled managers or trainers facilitate them. Frequent testing of the process will help you understand them as an essential F2F quality management tool to integrate into your operations.

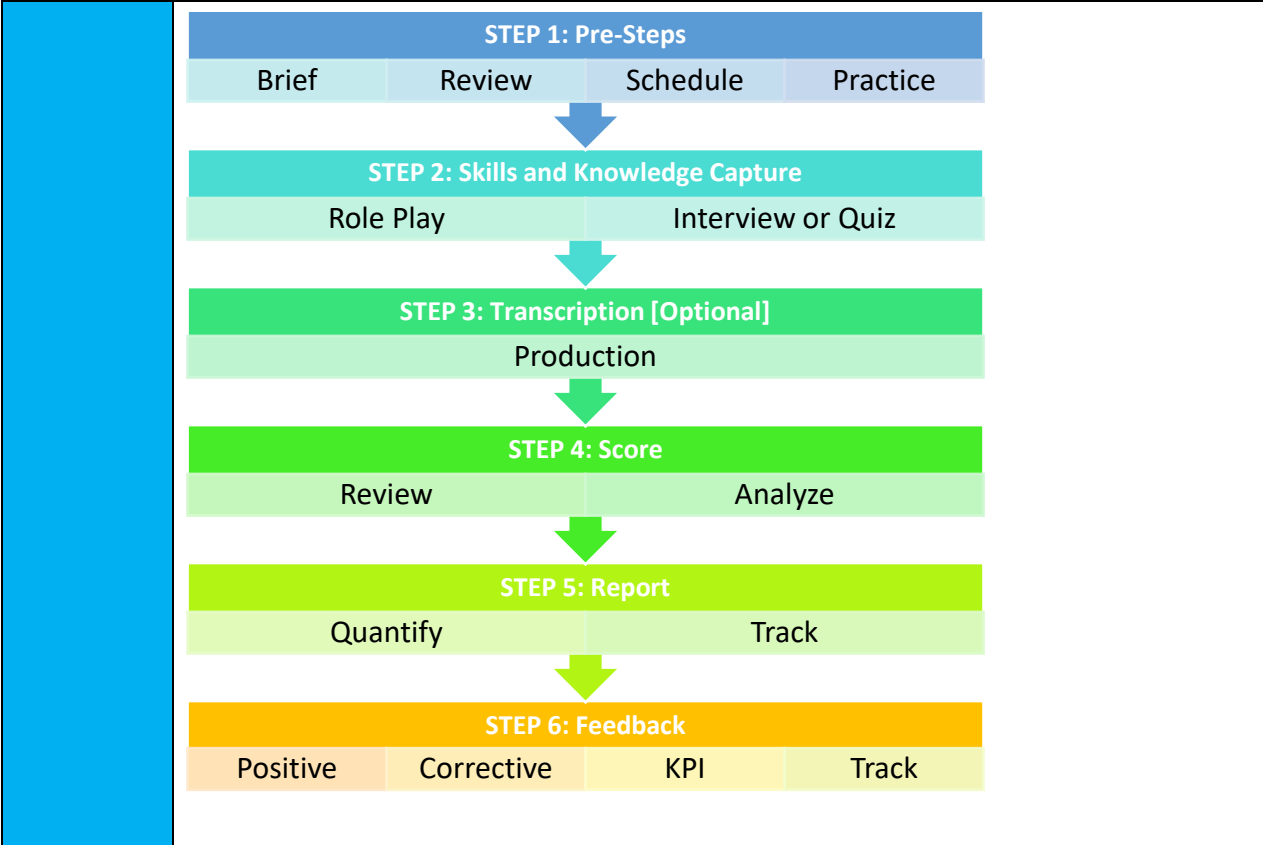
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Step 2: QMS Processes

Fundraiser Support Interview Score

Introduction	The Fundraiser Support Interview (FSI) is a two-step process that involves digitally recording a fundraiser dialogue in a role-play scenario with an FSI Facilitator who delivers a knowledge interview or test to measure the fundraisers required knowledge levels.
Goal	<p>The goal is to mirror our TM counterparts' access to quality control. They have continual access to audio recordings to quality check their TM agents, which is the responsibility of a dedicated resource on the TM management team to quality control consistently.</p> <p>To mirror the TM dialogue quality control, we need to capture an audio file of the dialogue so a F2F manager can closely analyse the content. The manager or facilitator then uses the FSI Template to score a CP, GP, and Ex to deliver feedback to help fundraisers progress and develop. Scoring the template can be done simply by listening to the audio. Or, to provide a more in-depth performance analysis, use the audio file to create a transcription of the dialogue.</p> <p>Measuring knowledge is necessary and a role-play alone cannot test all areas of expertise required by a high-performing fundraiser. For example, child safeguarding cannot be tested in a dialogue, and a dialogue is not designed to cover everything a fundraiser should know about UNICEF. Furthermore, an AES cannot cover D2D fundraising effectively as a mystery. Therefore, another complimentary process is required alongside AES to effectively test knowledge and monitor dialogues where AES is more complicated or difficult to implement.</p>
Outcome	<p>The dialogue skills are analyzed by either producing a written transcript from an audio file captured during the FSI or the audio files itself can be used for analysis. However, there seems to be more insight gained from creating a transcript as it enhances the feedback to the fundraiser by giving them the transcript and the highlighted areas for improvement</p> <p>In addition, knowledge is assessed through an interview process or an online quiz. The approach focuses on finding the exact areas a fundraiser needs support in to help them progress and deliver on UNICEF expectations and fulfil their potential.</p>
Process	An FSI is a 6 Step process with each step having multiple sub-Steps to complete.



Requirement

Audio capture

The most optimized and fastest method to conduct this quality control process is to capture crystal clear audio.

Crystal clear audio makes it easy for the FSI facilitator to listen back to the file and easily score the fundraiser and it also helps when uploading it to software that will automatically transcribe the audio file into text if you want to use the transcription option. However, if your audio or video file contains background noise or cannot pick up most of the words, it is a problem for the transcription process.

Audio quality and time management

- If the audio is high quality, then:
 - o You will not have to mark any Checkpoints, or Checkpoint Items as ‘un-scorable’ because you cannot hear that part
 - o You will need minimal time pausing and rewinding when listening back to score the fundraiser
 - o You will need minimal time editing it for accuracy in the transcription software once it is uploaded and transcribed
- If the audio quality is poor, then just highlight good and bad areas for feedback rather than attempting to transcribe the whole thing (as this will need a significant amount of time per dialogue and is not an effective use of time)

	<p>A digital microphone (which will require a budget to purchase) and a quiet, enclosed, closed room is a great option when doing this in person – <u>do not record from the computer mic or a phone mic directly</u>. Lapel mics will deliver the best sound capture for two people in a dialogue.</p> <p>Always test your setup for audio quality before recording! If the audio quality doesn't deliver a transcript, it is possible to skip the transcript step and listen to the audio to complete the FSI scoring. The analysis step will always be the fastest if you can get a high-quality audio file and a transcript.</p>
<p>Guidance</p>	<p>Transcript Production</p> <p>Producing a transcript is optional to the FSI process, but it can add significant value to both the analysis by the manager and the feedback to the fundraiser. Transcripts can be an additional tool to get deeper insights and work closely with fundraisers to optimize their dialogues more extensively.</p> <p>If creating a transcript of the recorded dialogue, then use one of the following options (there are many):</p> <ul style="list-style-type: none"> - Transcription is an option in Word in some office 365 packages (can be limited to 5 hours per month) - Use a transcription website such as sonix.ai or otter.ai (free hours might not be enough and can come with a cost) - If recording virtually, Teams and Zoom in some languages can produce transcripts that can be a starting point to edit (but these transcripts can be wildly inaccurate) - Use dictation in Word by listening to a sentence or two on the audio file and dictate directly into Word (a fast and cheap method which also gives the transcript creator deep insight simply by creating the transcript) <p>When using a transcription service, the high-quality audio file is uploaded to the website. Transcription services have efficient editing options to manually edit the unknown words, assign speaker roles, and ensure it is accurate before beginning analysis. The accurate transcription document can be exported as a Word or pdf.</p> <p>Any transcription produced from any one of the options can be shared back with the fundraiser and their manager alongside the audio file for a comprehensive analysis.</p>
<p>Resource</p>	<p>FSI Process Guidance</p>

FSI Process Guidance

#	Step	Sub-Step	Action
1	Pre-Steps	Brief	<ul style="list-style-type: none"> i. The FSI facilitator needs to complete a UNICEF support interview training or briefing ii. As the Facilitator should be a F2F Senior employee, they should not need extensive training (unlike an AES Facilitator who likely has no F2F experience) due to their experience with the skills and knowledge contained in the Checkpoints iii. The Facilitator must be briefed on the process before starting the FSI to ensure compelling interviews and results
		Review	<ul style="list-style-type: none"> i. Review the template and check understanding of each section and behaviour on the template to be able to complete it accurately ii. Review process to understand exactly how to document the findings as accurately as possible
		Schedule	<ul style="list-style-type: none"> i. Schedule an appointment with the fundraiser to record the role play ii. Allocate an appropriate time block for your 'interview' iii. Reserve any meeting rooms or spaces to conduct the FSI iv. Schedule the "interview" in the office, virtually (e.g., Teams or Zoom), or in the field (the field is the most fun, but it is the hardest to capture a suitable audio file)
		Practice	<ul style="list-style-type: none"> i. Practice the audio recording process and recording the highest quality audio possible ii. Practice taking notes and documenting what is required to complete the template iii. Practice creating a transcript from a recording either manually or using a transcription software iv. Practice using the transcript to complete the template if there have been any changes
2	Skills and Knowledge Capture	Role Play	<ul style="list-style-type: none"> i. The role-play is usually 10-12 minutes ii. Ensure the recording device is set up iii. Decide on the objection set to use iv. Build lots of rapport with the fundraiser and explain the role of UNICEF to support them to deliver the best donor experience possible v. Start recording (give them an option to start again if they want) vi. Complete the role play with sign up and objection set vii. Once done, put a significant effort into thanking the fundraiser viii. Give them one or two-piece of positive feedback about their script on the spot (leave any adjustments or negatives to the official feedback document) ix. Leave the fundraiser excited and thank them for their work at UNICEF
		Interview OR Quiz	<p>Interview:</p> <ul style="list-style-type: none"> i. Allocate enough time (an interview could be 30 mins+) ii. Print out the Q&As or have an excel template open to mark right or wrong as the interview is conducted <p>Quiz:</p> <ul style="list-style-type: none"> i. Allocate enough time (an online digital quiz takes less time and could be 20-30 minutes) ii. An online quiz is faster, easier to process results, and is more flexible with timing as a fundraiser can answer the quiz straight after the role-play or be given a time window to complete it

			<ul style="list-style-type: none"> iii. Knowledge assessed immediately after the role-play is testing what knowledge a fundraiser currently understands. If you test knowledge a different way, you give an opportunity for fundraisers to research the answers which you might not want to do to get an accurate picture of knowledge management. Fundraisers will not want to get it wrong, so if they have the chance to research any test, it will distort the results and could potentially subsequently impact your training plans and strategy. iv. Ensure any digital quiz captures the fundraiser details, so results do not come through anonymous
3	Transcription [Optional]	Production	<ul style="list-style-type: none"> i. Use the captured audio file to create a transcript with your chosen platform or process ii. Edit the transcript to get as close to 100% accuracy as possible
4	Score	Review	<ul style="list-style-type: none"> i. Decide how you are going to score the fundraiser (listen as you go, or listen and use the written transcript) ii. Listen to the audio recording in full once (recommended) iii. Listen and score as you go (pausing and rewinding when necessary)
		Analyze	<ul style="list-style-type: none"> i. Complete the FSI Template to score the fundraiser ii. Capture any other feedback that will benefit their performance from the transcript analysis or listening analysis at the end of the transcription document or in the template notes iii. Send the audio file or transcript to a manager or specialist for support if necessary iv. Store and label the audio file in a folder to manage an audio library of dialogues as a reference and to support fundraiser development
4	Report	Quantify	<ul style="list-style-type: none"> i. Complete the overall skills score and the breakdown of CP, GP, and EX ii. Complete the overall knowledge score for the tested Knowledge Blocks, and Knowledge Sets iii. Note any Facilitator un-scorable points as this is an excellent indicator to support an FSI Facilitator improving in the next round of QC
		Track	<ul style="list-style-type: none"> i. Track the scores to the categories in a spreadsheet per fundraiser ii. Use additional tabs for different rounds of FSI
5	Feedback	Feedback	<p>When delivering the feedback to the fundraiser post-analysis, you can choose to email them four things:</p> <ol style="list-style-type: none"> 1. Results summary of their FSI score, e.g., by Checkpoint, Knowledge Block, Knowledge Set 2. Completed template with scores and notes [optional] 3. Audio transcript [optional] 4. Audio recording [optional] 5. Video footage [optional] <p>The minimum priority is #1; results summary. A results summary will breakdown their score so they can understand their performance in all the tested Checkpoints and Knowledge Blocks.</p> <p>Notes captured by the FSI Facilitator can also be of significant value as feedback so put the relevant ones in a summary.</p>
		Positive	<p>Positive feedback in a formal process from UNICEF is a powerful tool to support a fundraiser;</p> <ul style="list-style-type: none"> i. Focus on delivering more positive feedback than corrective

			<ul style="list-style-type: none"> ii. Where possible, make the feedback something a fundraiser would be excited to hear from UNICEF iii. A good ratio is 3 or 4 positives for every 1 corrective iv. Give feedback on skills in one section v. Give feedback on knowledge in a separate section
		Corrective	<ul style="list-style-type: none"> i. Review the total number of areas a fundraiser needs to improve ii. Remember the 3:1 ratio iii. Target the most critical areas (CP first, then GP, then EX) iv. Prioritize the corrective feedback to deliver the most important if you find many places to improve v. Give corrective feedback on skills vi. Give corrective feedback on knowledge vii. Ensure the feedback form emailed to the fundraiser allows them to review their entire score (this way, you only list the few areas you want them to correct and do not list all areas, but the fundraiser can see their entire
		KPI	<ul style="list-style-type: none"> i. Use the quantified qualitative data to manage and set qualitative KPIs (to the fundraiser, manager, or agency) ii. Using the completed template target specific areas for a fundraiser to address before the next FSI iii. Target any relevant Checkpoint overall score that needs work iv. Target any critical individual CheckPoint item score that needs work v. Target any relevant Knowledge Blocks overall score that needs work vi. Target any critical Knowledge Sets overall score that needs work
		Track	<ul style="list-style-type: none"> i. If any KPI is set as a target, then it needs to be tracked in a results spreadsheet ii. If any KPI has previously been targeted, compare progress to the previous score

Toolkit Feedback

To help us improve both the QMS and this Toolkit, please fill out this [quick feedback form](#) which will take approximately 4 minutes to complete.

Help us to understand:

- What works?
- What does not work or needs more work?
- What did you learn?
- What did we miss?
- +
- What are your ideas to improve the QMS and this Toolkit?