CALL RECORDING

Evaluate

Quick Reference Guide

MOMENTUM

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25Q1e

About Call Recording Evaluate

The Evaluate add-on license ($) offers organizations many tools for determining how their calls are going and for Quality Assurance monitoring. Both Manual and Automated evaluation scoring are supported.

An Evaluate license is applied to the person/line being recorded that must undergo evaluation. If the line/ person is not going to be evaluated, the add-on license is not needed.

Once purchased and enabled for the line/person who will undergo evaluation of their calls, Supervisors (or Admins) who have been authorized to manage that licensed line/person's call recordings can then perform evaluations of their calls using forms the organization has complete control to design and manage for this purpose.

Evaluation reports provide access to useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for specific agent, evaluations for groups, etc.

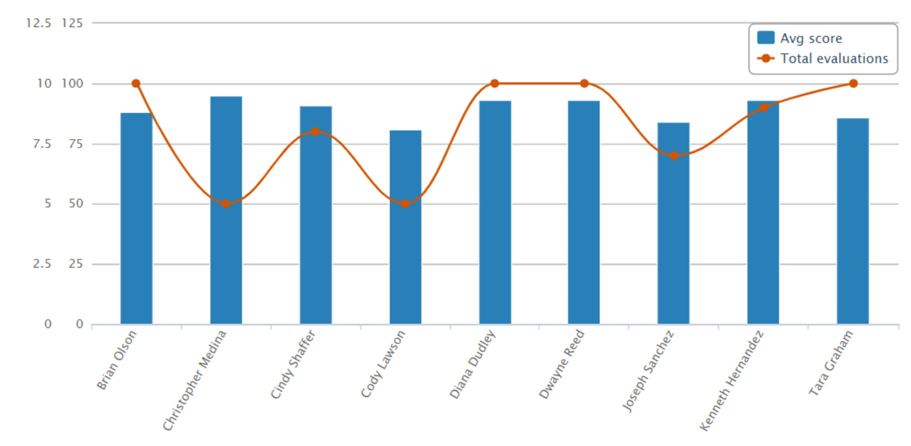
Wide view

Reports

- Reports
- **Evaluation Reports**
  - All Reports
  - **Group Reports**
  - Agent Reports

Agent Evaluation (Group Reports)

2021/01/02 - 2022/01/31 | Group Mcconnell-Rodriguez



AGENT	TOTAL EVALUATIONS	MIN SCORE	MAX SCORE	AVG SCORE
Brian Olson	10	70	94	88
Christopher Medina	5	90	99	95
Cindy Shaffer	8	68	98	91
Cody Lawson	5	64	95	81
Diana Dudley	10	91	97	93
Dwayne Reed	10	88	97	93
Joseph Sanchez	7	60	98	84
Kenneth Hernandez	9	88	99	93
Tara Graham	10	59	96	86

Administrators (and perhaps authorized Supervisors) can easily create an Evaluation form within the ***Evaluation Form Designer*** found in the **Administration > Customization** section of Call Recording.

The Call Recording **Evaluate** add-on allows contact center managers to monitor and measure the performance of individual agents in a contact center. Call Recording supports both manual and automated scoring (when combined with the Speech Analytics ($) add-on for Quality Assurance.

Manual Quality Assurance 101

With manual Quality Assurance (QA), supervisors listen to a random sample of calls and evaluate them according to a predefined scorecard. The goal is generally to look for coachable moments and find areas where agents can improve.

A typical scorecard consists of several sections, like "Greeting", "Verification", "Problem resolution", etc.
Each section includes questions or metrics that are evaluated by the supervisor as they review an agent's call.

Here is a sample of an evaluation form that might be created for manual evaluation usage:

Section	Questions
Greeting	Did the agent say "Thank you for calling"?
	Did the agent mention his/her name?
	Did the agent mention the company name?
	If the call was transferred, did the agent adapt the greeting accordingly?
Verification	Did the agent ask for the caller's name?
	Did the agent ask for the caller's account number?
Understanding the problem/ issues	Did the agent identify the customer's needs by active listening?
	Did the agent fully understand the request?
	Did the agent repeat back to the customer what their query or problem was?
	Did the agent show empathy to the customer's problem and reassure the customer?
	How well did the agent determine the problem/complaint and select the appropriate response?
Hold/mute/transfer	Did the agent inform the caller of the reason for the hold/transfer?
	Did the agent thank the caller for holding on return?
	Did the agent provide the name of the person or the department in case of transfer?
Problem resolution	Was the problem resolved in the first call?
	Did the agent describe clearly the resolution?
Closing	Did the agent offer to transfer to a customer satisfaction survey?
	Did the agent thank the customer for calling?

Humans performing quality assurance evaluations manually will always be essential in monitoring and measuring the quality of customer service in contact centers and other business interactions via telephone. But it has had some limitations - it is often time-consuming for Supervisors as they are able to listen to only a fraction of calls when evaluating agents - and that can lead to a less than accurate picture of their agents' performance. If a Supervisor only listens to a few bad calls but misses the stellar calls that helped keep their business growing... and vice versa... and that can skew the evaluation of an employee's perormance - and the Call Center's, as well.

Automated Quality Assurance 101

Automated QA process uses speech analytics and artificial intelligence (AI) to automatically score every interaction performed by those with Evaluate and Speech Analytics add-on licenses, providing a fuller and more unbiased evaluation of agent performance.

By capturing, transcribing, and analyzing 100% of interactions, the Call Recording platform vastly increases insight into agent performance and offers a wealth of actionable information for call center improvement - while dramatically reducing the effort required of call center supervisors.

Despite the obvious benefits of automated QA, it should not be viewed as a complete replacement of the manual Evaluation and QA process. The best approach is to integrate both manual and automated scoring into any robust QA process.

Evaluation forms are completely customizable and configurable. A Call Recording Administrator (or properly authorized/licensed Supervisor) can create many different evaluation forms to suit various departments or groups - like Sales, Customer Service, or Technical Support - using the Evaluation Form Designer to develop the questions and answers and define the scoring to produce useful evaluation tools and reporting.

Usage Prerequisites

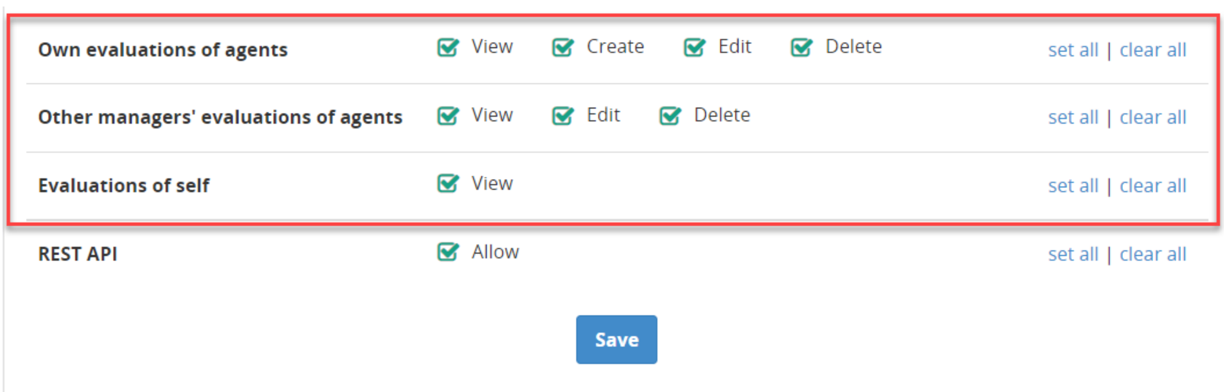
The Role applied to a Supervisor (and Administrator) must be set up to allow usage of Evaluate tools.

The license for Evaluate must be applied and enabled on the line/person being recorded and evaluated.

A Supervisor assigned to manage that line/person's recordings can then perform evaluation on those recordings using Evaluation forms they have been granted access to use.

An Administrator must have appropriate permissions to fully utilize the evaluation form creation and reporting functionality. The Permissions settings in their Role specify which tasks are permitted on the accessible evaluation reports. These permissions can include view (read only), create, edit, delete.

The permissions on the Role(s) in use within the tenant that need to be enabled for correct usage of Evaluate tools and reports are found within the Other Permissions section of the Edit Role dialog:



Own evaluations of agents

- **View** - if enabled, the Supervisor will be able to view the evaluations of their managed agents
- **Create** - if enabled, the Supervisor will be able to create new evaluation forms
- **Edit** - if enabled, the Supervisor will be able to modify or change the evaluation forms of agents under his/her supervision
- **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under his/her supervision. Use with caution.

Other managers' evaluations of agents

- **View** - if enabled, the user will be able to view the evaluations of agents under other managers' supervision
- **Edit** - if enabled, the Supervisor will be able to modify the evaluations of agents under other managers' supervision
- **Delete** - if enabled, the Supervisor will be able to delete the evaluations of agents under other managers' supervision. Use with caution.

Evaluations of self

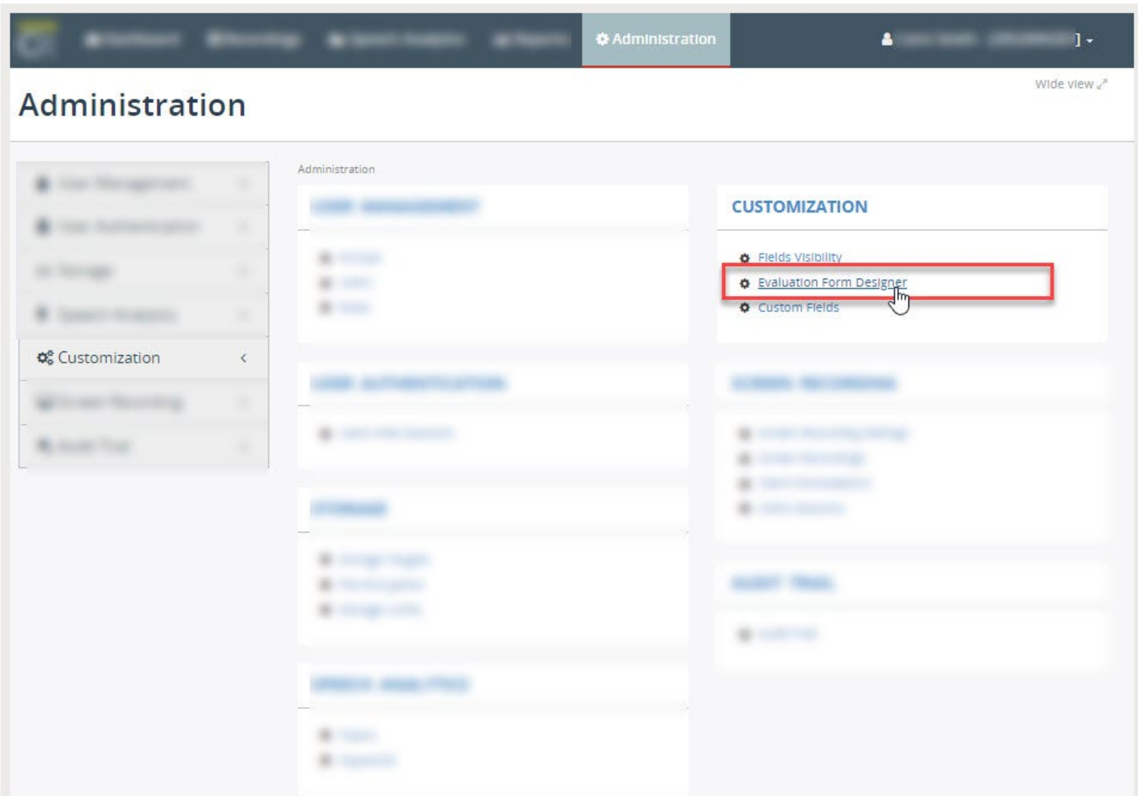
- **View** - if enabled, the Supervisor will be able to view their own evaluations. If this is the only option selected, the Supervisor will only see the results of their own evaluations but no others.

Note: All Role settings are predefined and cannot be edited.

Manage Evaluation Forms

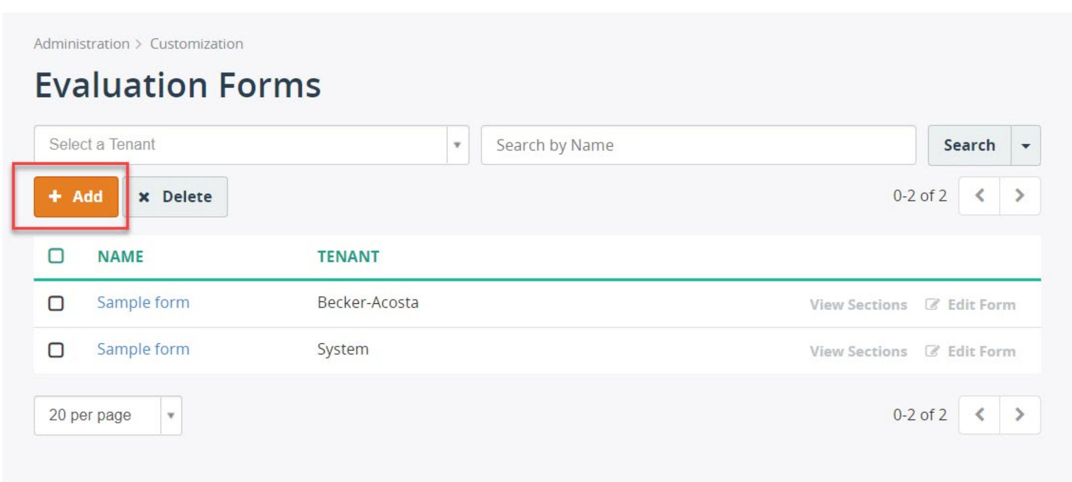
To Access Evaluation Form Designer

Go to **Administration > Customization > Evaluation Form Designer**

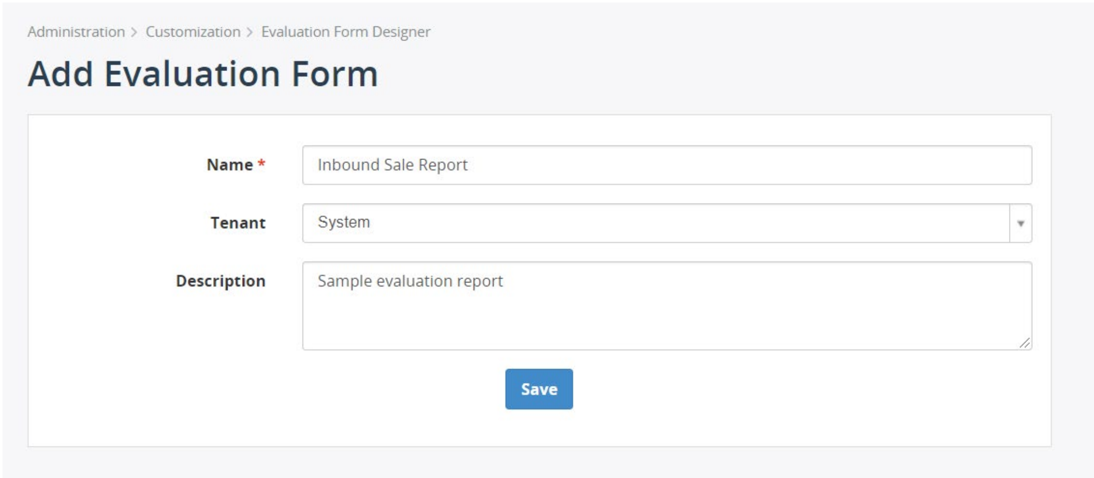


To Create an Evaluation Form

While viewing the **Evaluation Form Designer** section:



1. Click the **Add** button to open the ***Add Evaluation Form*** dialog to begin creating a new Evaluation form.

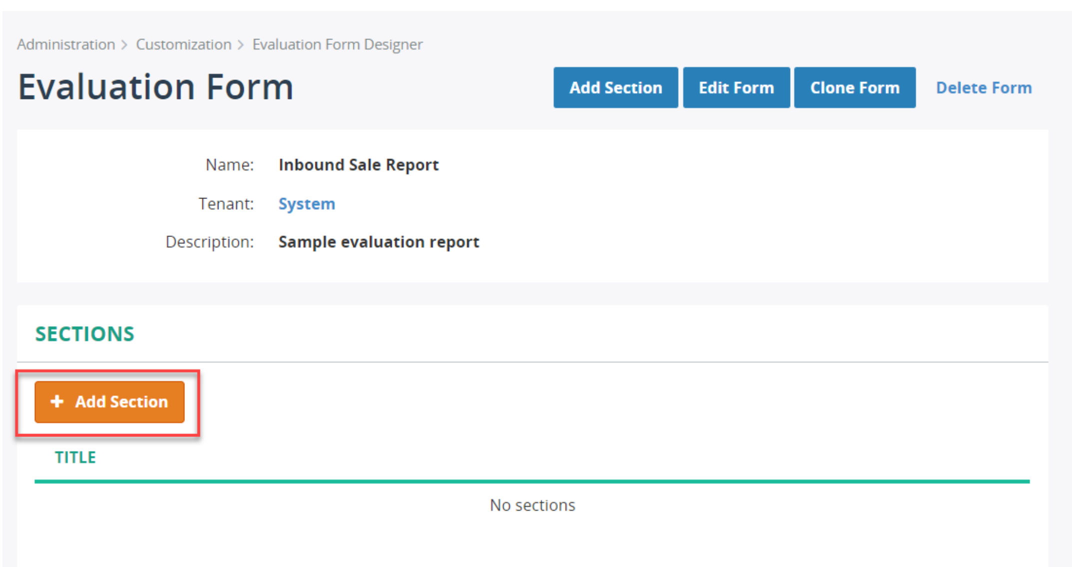


2. Enter the following information in the fields provided:
   - **Name**: Enter the form name in this field. This name displays in lists and reports.
   - **Tenant**: If available, the organization's tenant displays and does not need to be modified.
   - **Description**: Optional. Enter a short description of the purpose of this evaluation form in this field.
3. Click the **Save** button when finished so save the new form and return to the list.

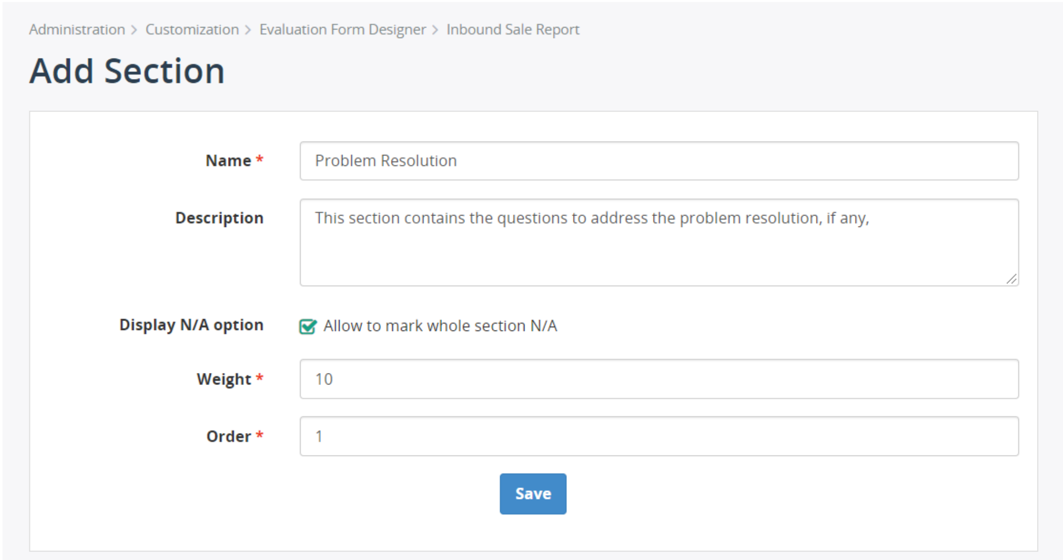
To Add Sections to Evaluation Forms

While viewing the list in **Administration > Customization > Evaluation Form Designer**:

1. Click on the evaluation form to which new sections and questions will be added.
2. Click on the **Add Section** button.



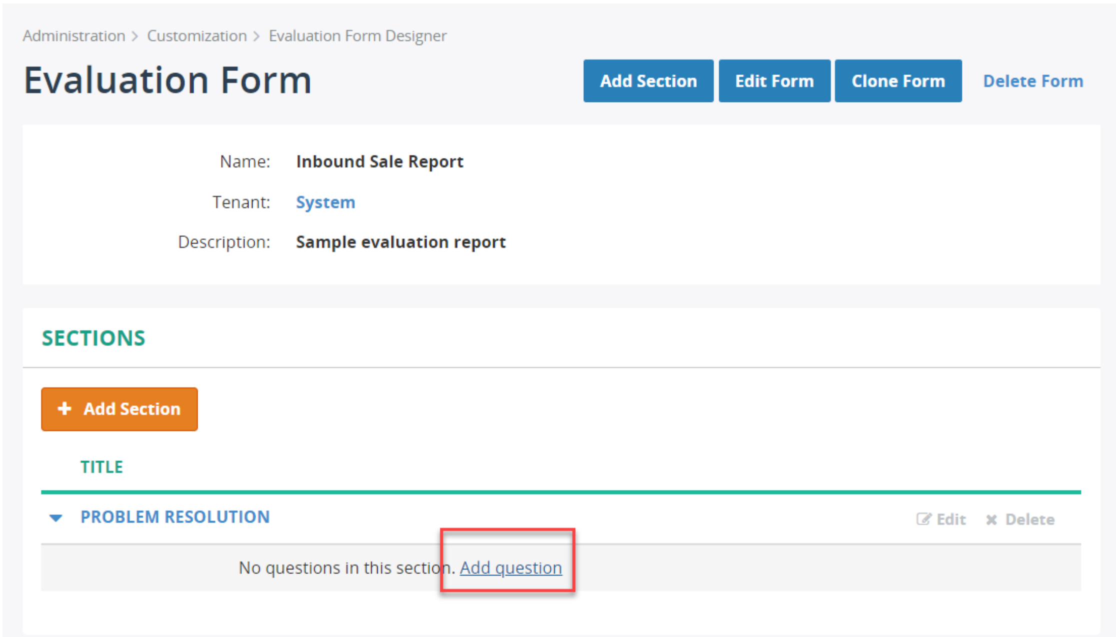
*The **Add Section** dialog displays.*

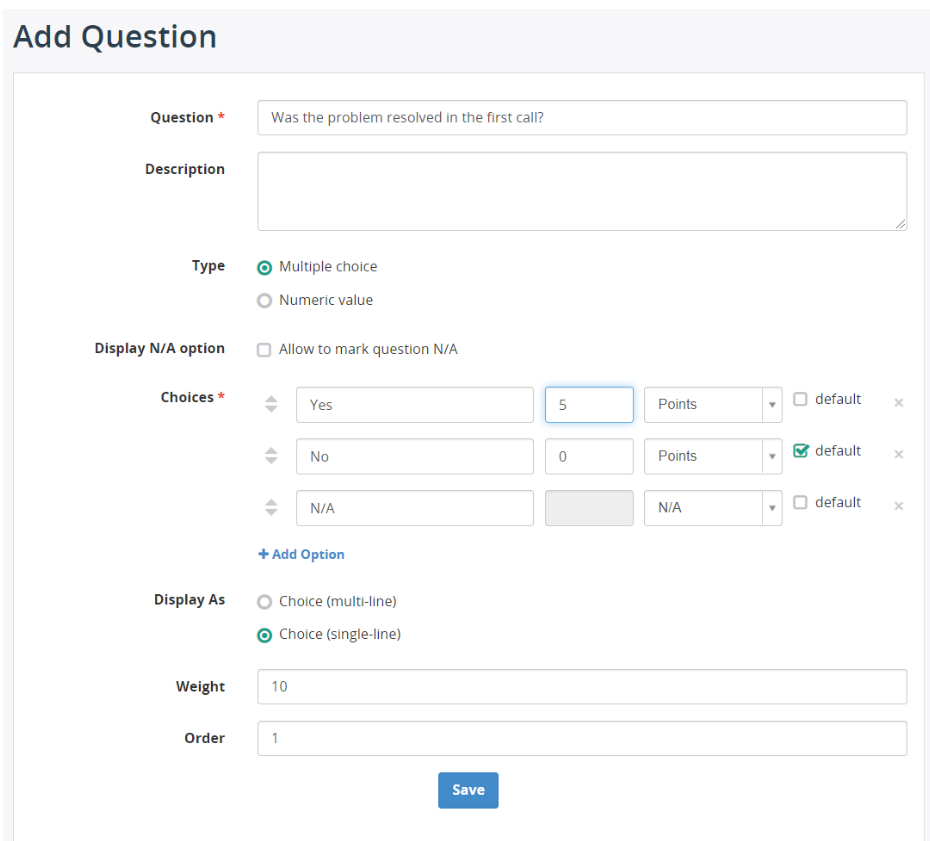


3. Complete the following:
   - **Name**: Required. Enter the name of the form's first section in the **Name** field.
   - **Description**: Optionally, provide a short description of the purpose of this section in the **Description** field.
   - **Display N/A option:** Click to place a check in this box to allow Supervisors to set the section of questions as N/A (not applicable) as needed when performing evaluations.
   - **Weight**: Required. **E**nter a numeric value defining how much this section influences the Section score. The integer value can be both positive and negative numbers within the `±1000` allowed. Do not enter 0. The value `0` is not supported. See Evaluation Form Scoring for more about calculating the weighted score.
   - **Order** field, specify the order in which the section appears in the evaluation form when performing an evaluation. Sections are ordered by lowest value first. So, 1 would display to Supervisors first, 2 would display to Supervisors after 1, and so on.
4. Click **Save**.

To Add Questions to Evaluation Sections

1. Click the evaluation form where new questions will be added to a section.





4. Complete the following required and optional sections in the dialog:
   - **Question**: Required. Type the question text in this field.
   - **Description.** Optional. Type a short description of the purpose of the question this field.
   - **Type**: Click to choose either Multiple Choice, or Numeric Value.

If Multiple Choice is selected, define the following:

Display N/A Option: Click to enable if the Supervisor can use N/A as needed to skip this section's questions.

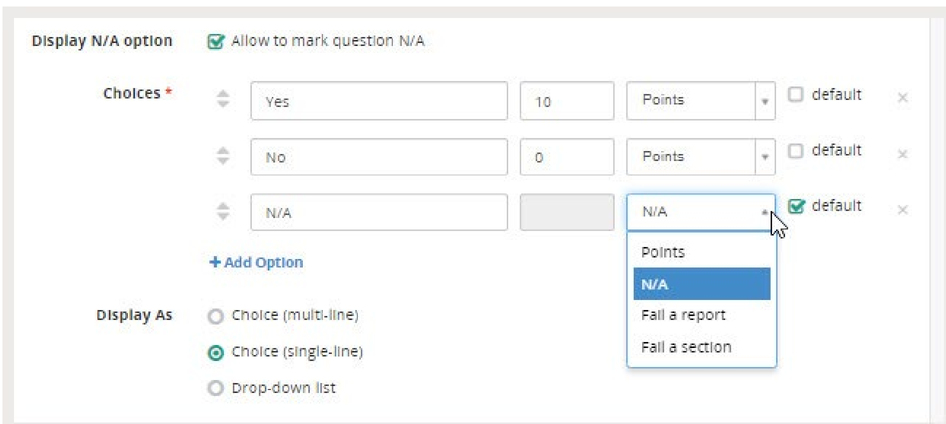
Choices: Required. Using the 3 table view fields, define the following:
a) Type the answer options from which the supervisor may select when performing this part of the evaluation. The Admin may click ***Add Option*** to include as many option choices as needed.

b) Specify how selecting this option affects the section score using the drop-down menu (far right). The drop-down menu offers Points, N/A, Fail a report, or Fail a section.

c) Enter an amount of points in the second field if Points was selected as the way to score for the option.

d) Click to make the option the ***default*** answer selection in this section unless changed, as desired, by clicking the adjacent default checkbox.

e) **Display As**: Optional. Choose the way the options created above display to Supervisors when they review the section in an Evaluation. The options here include Choice (Multi-Line or Single Line) or Drop-down list.

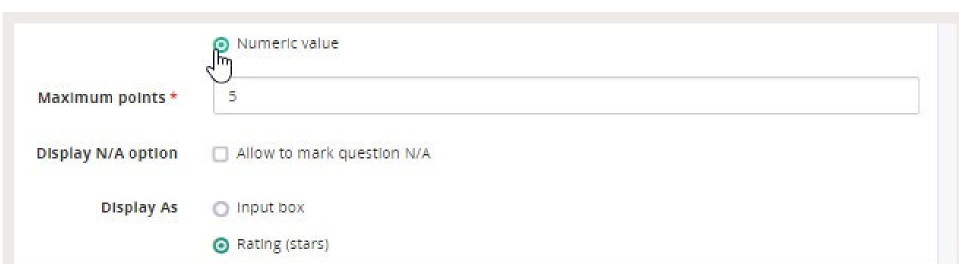


If Numeric Value is selected, define the following:

a) **Maximum Points**: Required. Define a maximum numeric value for the question

b) **Display N/A Option**: Click to enable if the Supervisor can use N/A as needed to skip this section's questions.

c) **Display As**: Select what the Supervisor will see - an *Input box (a text field)* or *Rating (stars)*.

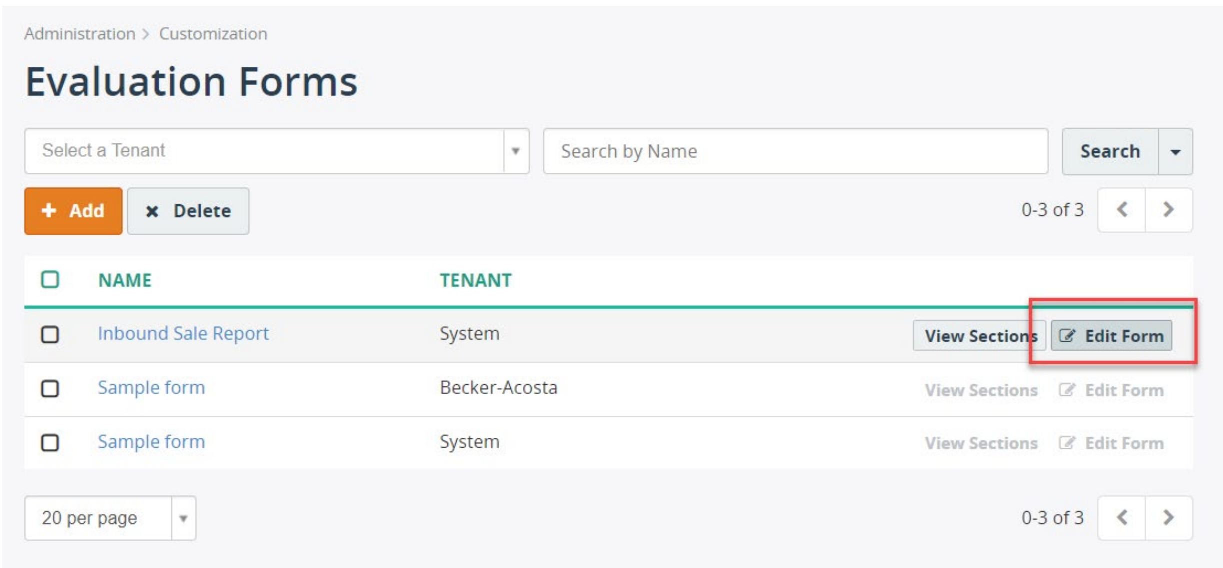


5. In the **Weight** field, enter how much this question influences the Question Score in this evaluation. The integer value can be 1 - 1000. The value `0` is not supported.
   For details on calculating the weighted scores, see Evaluation Form Scoring.
6. In the **Order** field, specify the order in which the question appears.
   Questions are displayed in ascending order - by lowest value first. So, an entry of 1 here would mean this is the first question displayed in the section. A 3 entered here would display the question as third in the list of questions.
7. Click **Save** when finished defining questions to submit to the Evaluation Form.

To Edit an Evaluation Form Name

At any time an Admin can edit the name or description for any form that was previously created and saved.

1. Click the **Edit Form** button next to the desired form.



*The **Edit Evaluation Form** page displays.*

2. Change the name or description and click **Save**.

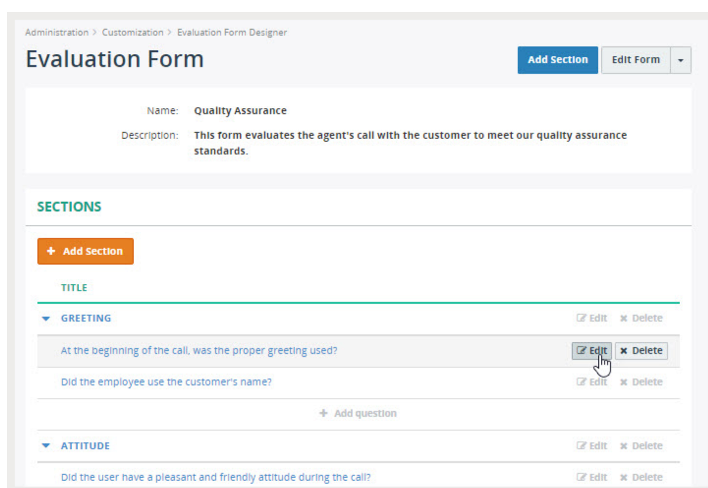
To Edit an Evaluation Form's Sections or Questions

At any time an Admin can edit the sections or questions in any form that was previously created and saved.

While viewing the Evaluation Forms list:

1. Click the **View Sections** button next to the desired form in the list to view the form's sections and questions.

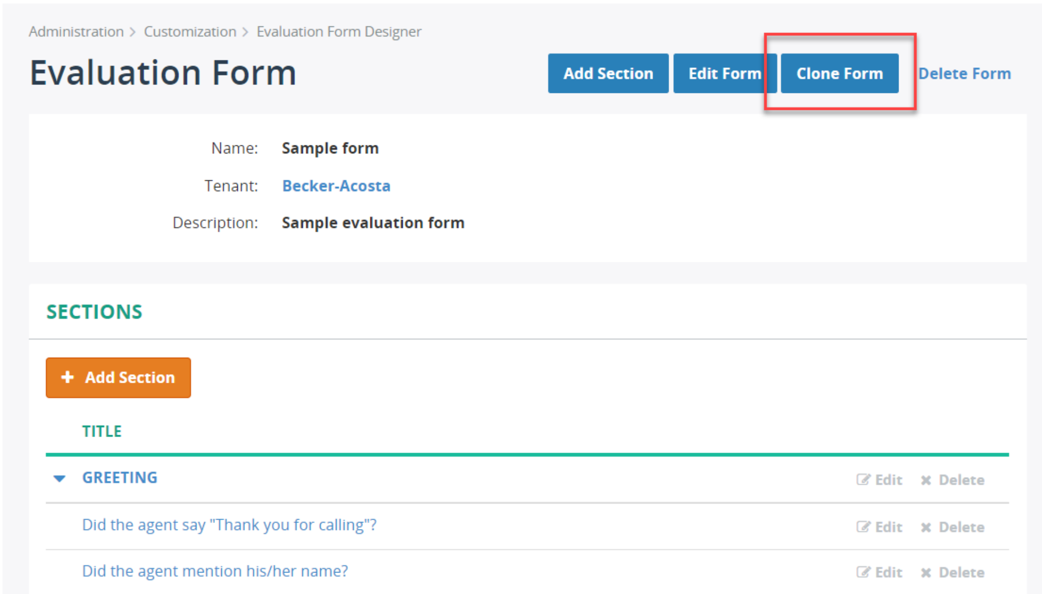
   Tools are provided to allow the Admin to Add, Edit, or Delete both Sections and questions within the form, or Edit the Form name/description.



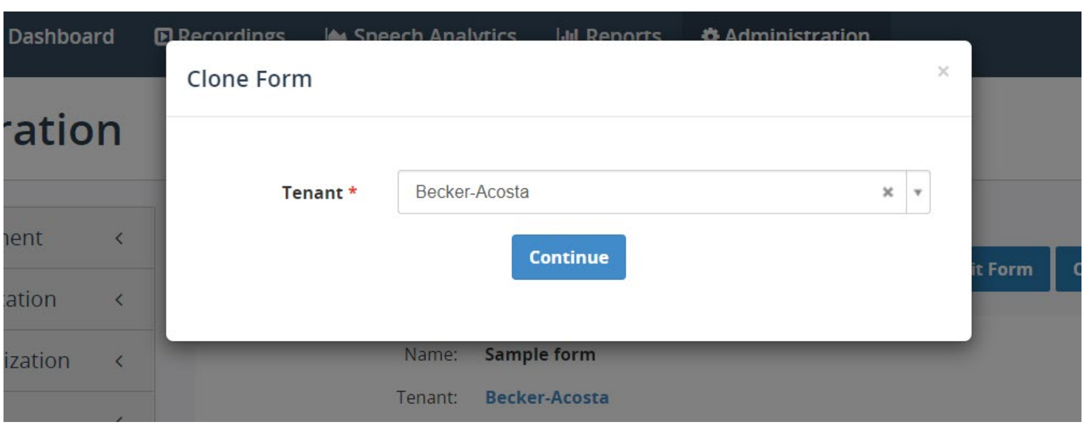
To Clone an Evaluation Form

If authorized and enabled, Administrators can create an exact copy of an existing form and use it as the basis for a new and different evaluation form.

1. Click the evaluation form that is to be copied and reused as the basis for a new Evaluation.
2. Click on the **Clone Form** button to begin.



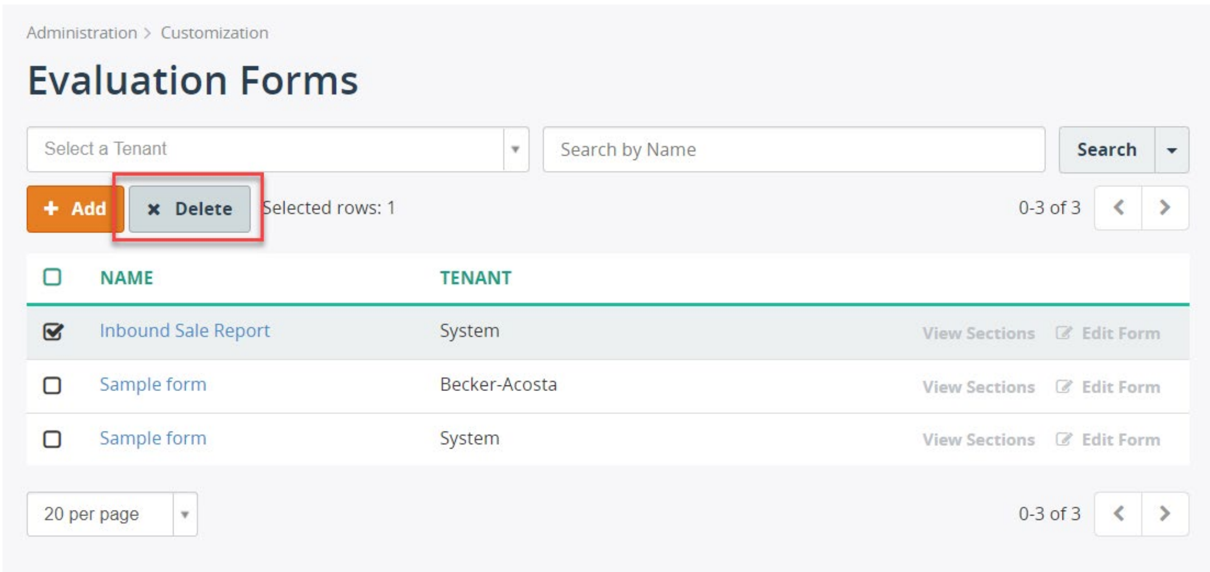
3. Click **Continue** when prompted.
4. Use the same steps described before to name the Form appropriately and add or modify sections or questions within the form to make it useful.
5. Click **Save** when finished modifying the cloned Evaluation to make it unique.



To Delete an Evaluation Form

While viewing the Evaluations Forms list:

1. Locate the desired form.
2. Click to select the check box next to the target form
3. Click on the **Delete** button above the list.

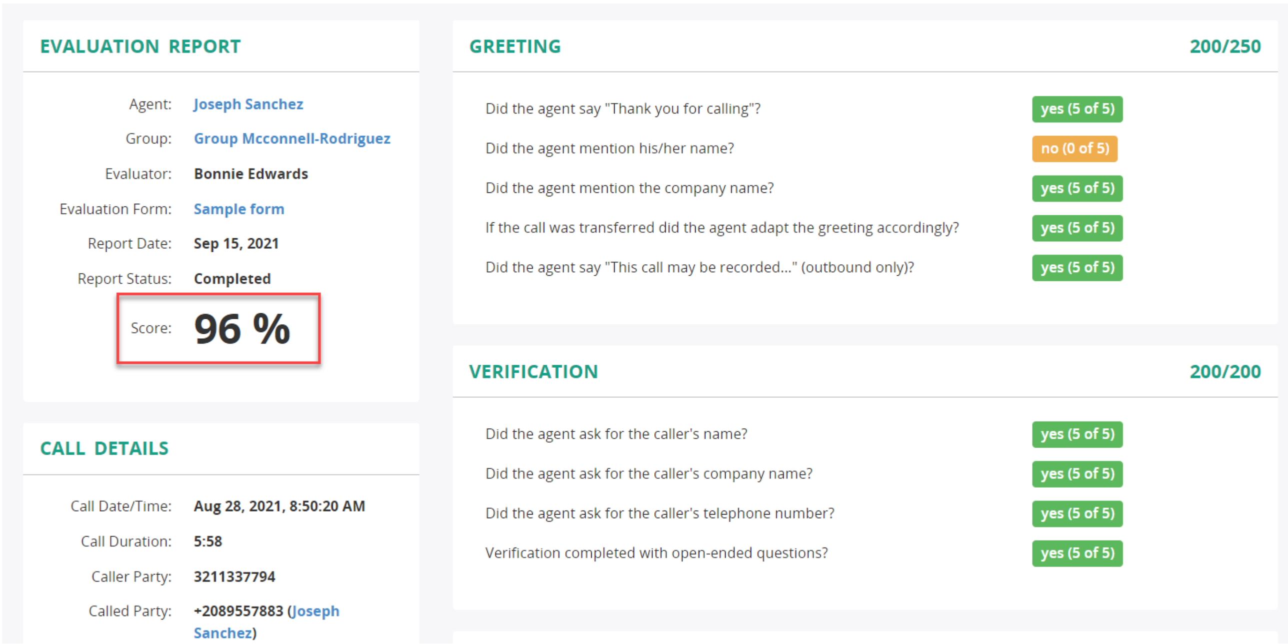


NOTE: Deleting an evaluation form will delete all report results based on this form as well. The popup notification dialog displays noting that the form has been deleted.

Clicking the **Undo** link that displays in the notification dialog will restore the form to the list for future use.

Evaluation Form Scoring

Each evaluation is scored based on a point system. By default, the sections and questions are not weighted; that is, the number of points gained by the agent determines its weight. Alternatively, each section and question could have its own weight that determines how much it influences the total score for the evaluation report. These weights are applied *after* all sections are scored to arrive at the overall score for the evaluation. The calculated total score is displayed as a percentage in the evaluation report.



Question Score Calculations

Question scores are calculated based on the applied weights and use the following formula:

```
Weighted Question Score = Question Score X Question Weight
```

If an evaluator answers N/A, Call Recording treats the score as if the question does not exist.

The following table shows the potential points that a question with a 0–5 answer scale could earn if it has a weight of 1 or 5.

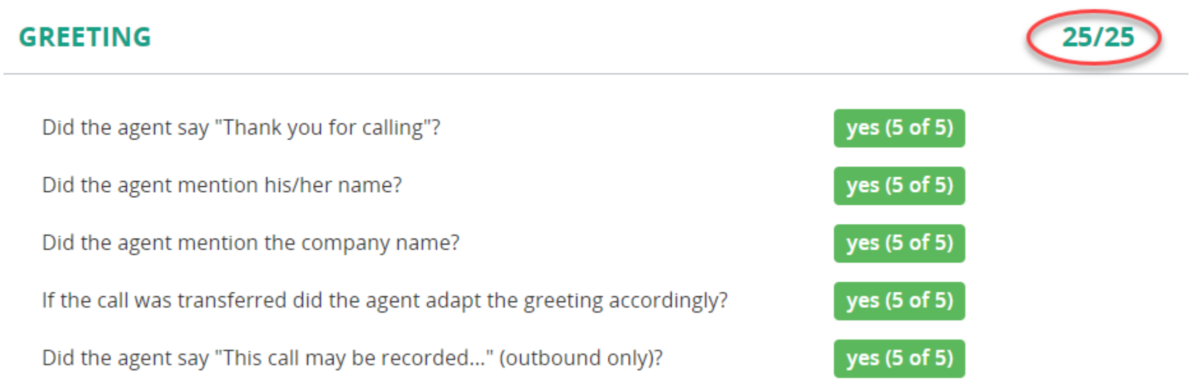
Scale Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
N/A	—	—
0	0	0
1	5	25
2	10	50
3	15	75
4	20	100
5	25	125

The following table shows the potential points that a Yes/No question could earn if it has a weight of 1 or 5.

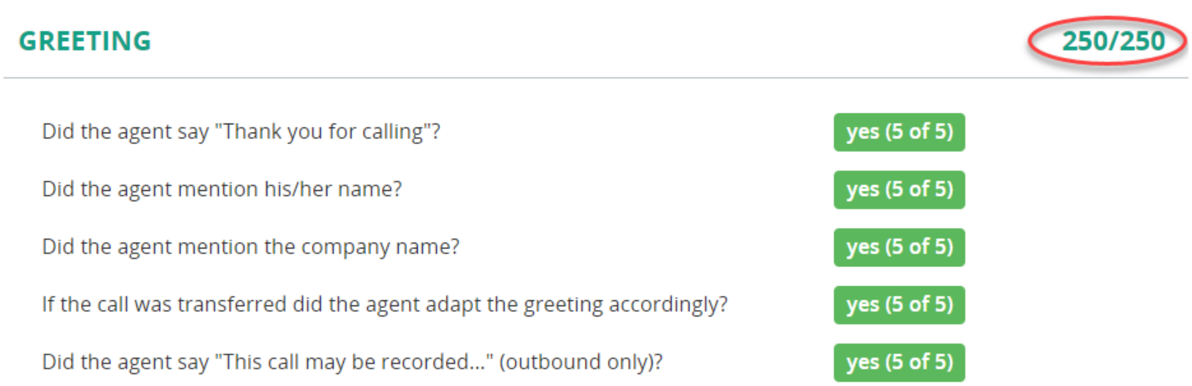
Answer	Points Earned (Question Weight of 1)	Points Earned (Question Weight of 5)
Yes	10	50
No	5	25
N/A	—	—

Section Score Calculations

Section scores are calculated by aggregating the question responses within the section altogether. The example below illustrates the section score with no weighting applied (or weighting of **1**).



To calculate weighted section scores, the system will multiply the section score by its weight. The example below illustrates the section score with a weighting of **10**.



Total Score Calculations

The total score is calculated by aggregating the section scores altogether. Evaluation forms use the following formula for calculating the total score:

```
[Total Score / Maximum possible score ] * 100
```

The following table shows the results for several sections in a sample evaluation form.

Section	Weight	Score	Weighted Score
1	1	10 of 10	10 of 10
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: 105/120 x 100 = **88%**

The following table shows the results for several sections with the first section marked as “not applicable” (N/A) .

Section	Weight	Score	Weighted Score
1	1	N/A	N/A
2	1	20 of 20	20 of 20
3	2	10 of 10	20 of 20
4	2	20 of 20	40 of 40
5	3	5 of 10	15 of 30

Section Score: 95/110 x 100 = **86%**

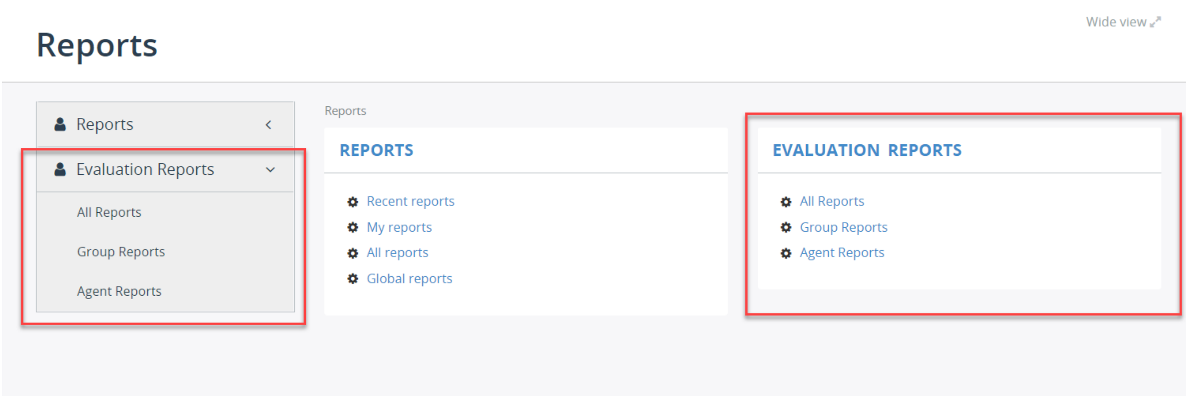
Manage Evaluation Reports

To Access Evaluation Reports

The Call Recording Evaluation Reports section has the following structure:

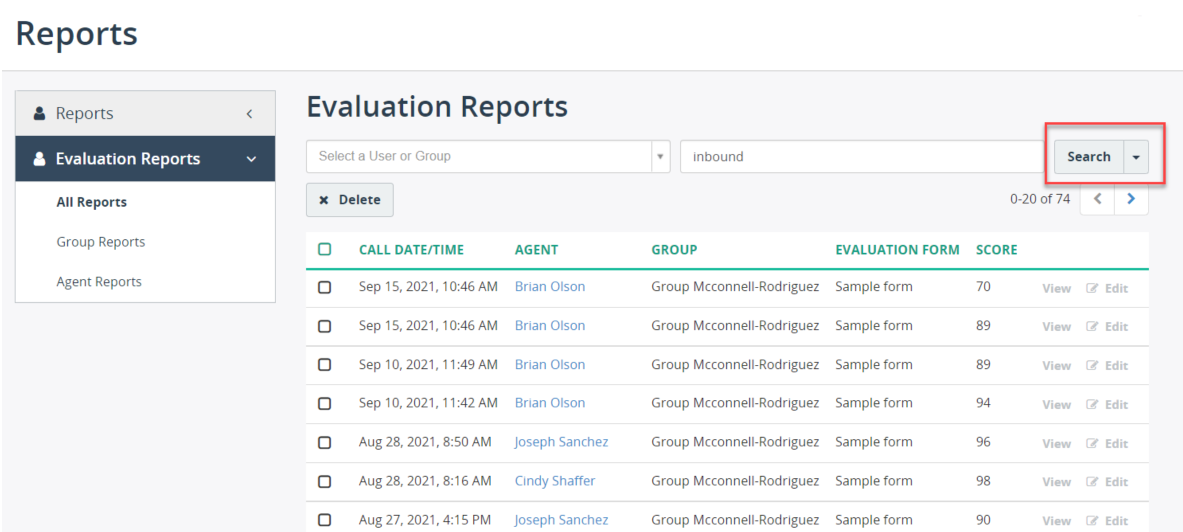
- **All Reports** - lists all available evaluation reports.
- **Group Reports** - lists the evaluation reports from the specified group.
- **Agent Reports** - lists the evaluation reports by a specific agent.

Administrators can access each report group via the **Evaluation Reports** navigation tree or clicking a specific group on the **Reports** home page.



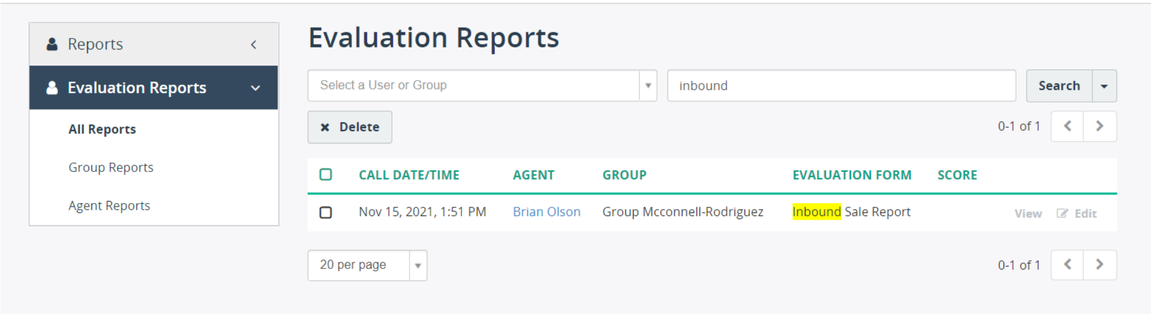
To Search Evaluation Reports

To search for an existing evaluation report, enter the name of the evaluation form in the search field, and click the **Search** button. Also, to narrow down the search results, search the report by a specific user or group.

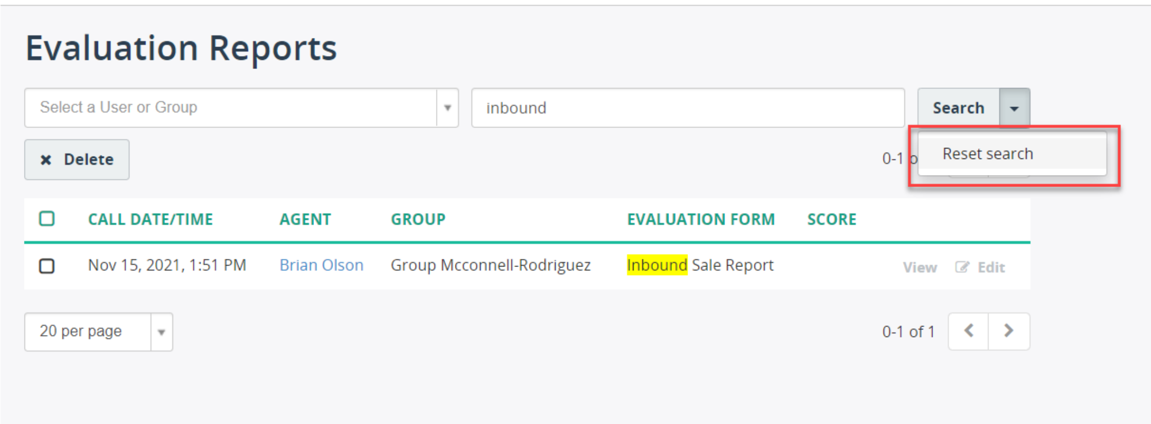


The page refreshes to display only the evaluation reports that match the search criteria.

Reports

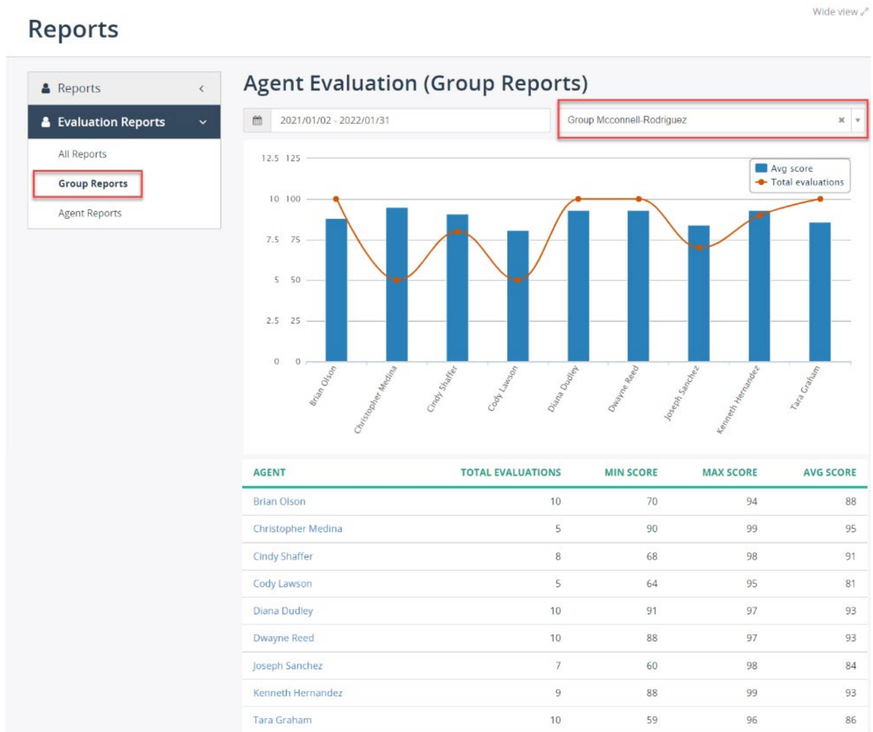


To reset the search criteria, click the **Search** button drop-down arrow and then select **Reset search**.

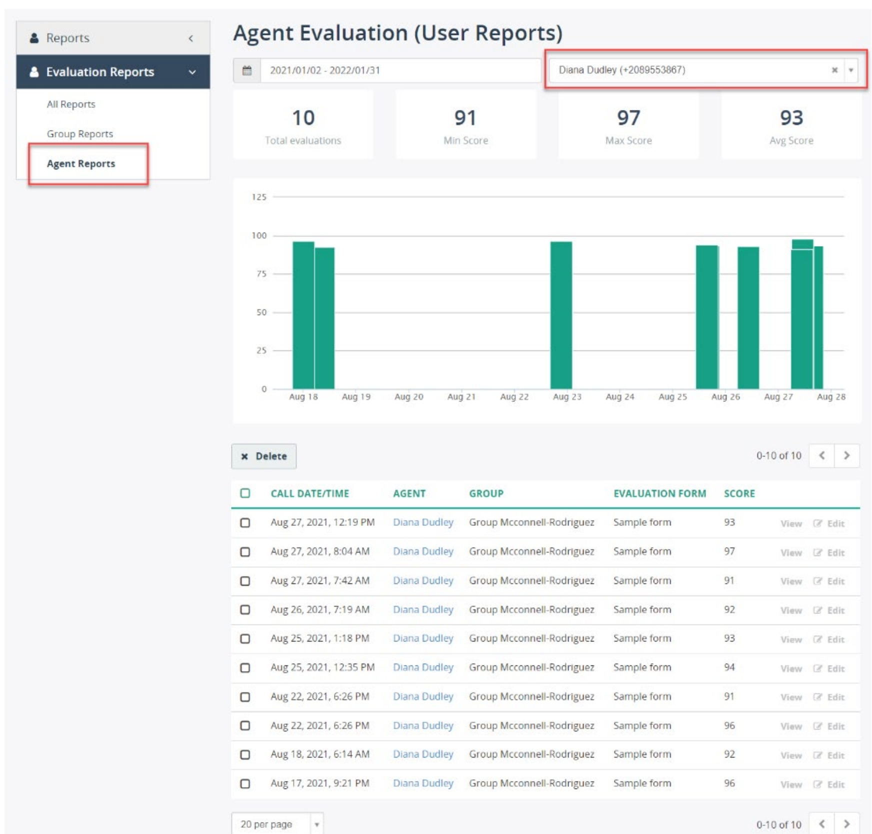


To Filter Evaluation Reports by Group or Agent

By clicking **Group Reports** in the navigation tree and then specifying the group name, evaluation reports can be filtered bythe target group. The summary chart with the evaluation performance is provided at the top of the page.



By clicking **Agent Reports** in the navigation tree and then specifying the Agent name, evaluation reports can be filtered by the target agent. The summary chart with the evaluation performance is provided at the top of the page.



To Review an Evaluation Report

Authorized Supervisors or Admins may open and review the details in an evaluation report by clicking the **View** button next to a report.

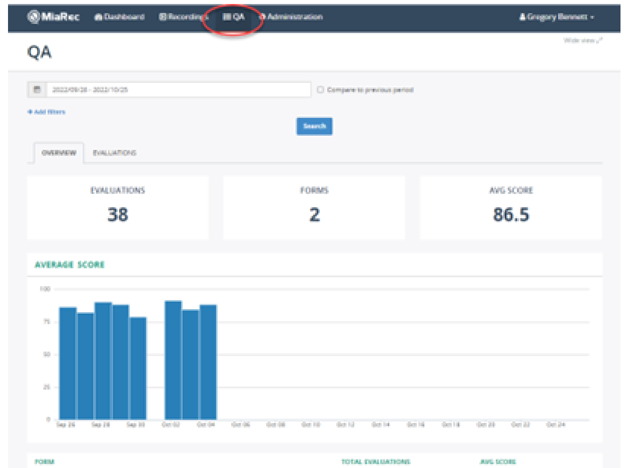
To Delete an Evaluation Report

1. Go to **Administration > Reports > Evaluation Reports**.
2. Locate the report to be deleted within the list of reports that have been created.
3. Click to place a check in the box next to the report of choice
4. Click the **Delete** button above the list.

QA Dashboard

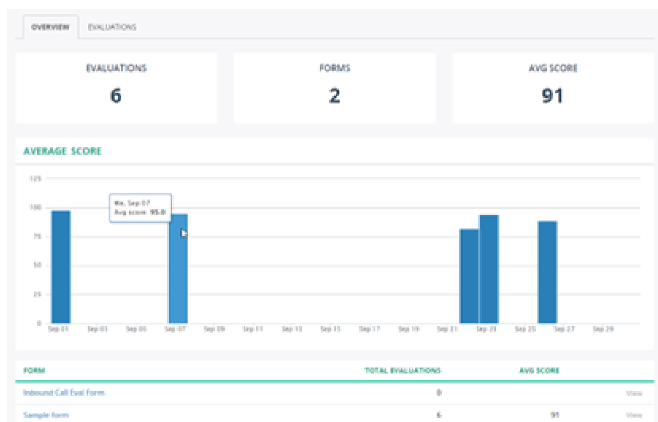
Once the call recordings have been evaluated, you can check evaluation results by navigating to the QA dashboard. The QA dashboard is an intuitive visual reporting tool that provides useful statistics, including average, minimum and maximum agent scores for the given period, total evaluations for a specific group or agent, etc.

This allows customer service managers and teams to monitor and optimize performance and spot emerging trends in a central location.

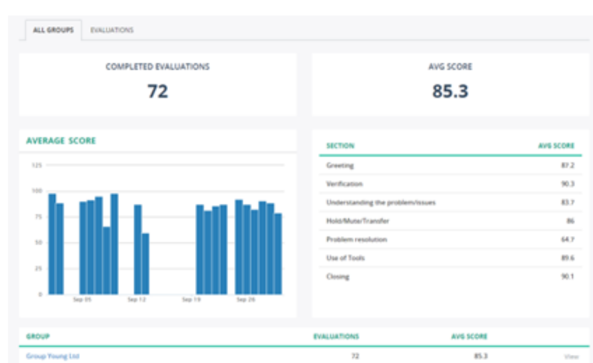


Overview Tab

The Overview tab displays the summary chart with the evaluation performance and provides information about the total number of evaluated recordings, evaluation forms used, and average score calculated. Users can view the number of evaluations per day within the chart by hovering the cursor over a point on the graph.

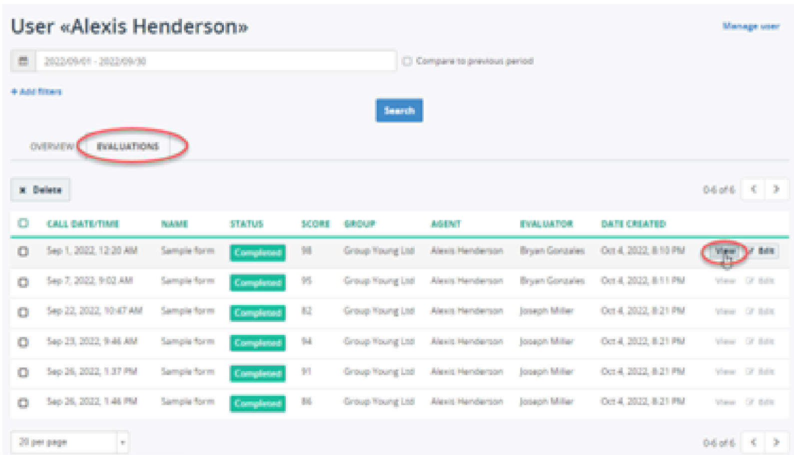


To view evaluation data for a specific evaluation click View next to the item in the list.

Evaluations Tab

The Evaluations tab lists all evaluation reports being used for a specific group or user



You can open the most recent evaluation report by clicking the View button next to the report.