EVOLVE IP

THE CLOUD SERVICES COMPANY™

Quality Management

User Guide

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1 General Description

The Quality Monitoring Scorecard feature in Call Recording Portal allows users with proper privileges to evaluate calls by “scoring” or “marking” them based on a set of predefined criteria.

The criteria are defined in Scorecard Templates. A Scorecard Template is associated to a “group” in the Call Recording Portal. Groups may represent company departments or any other logical entity.

When a call is to be “scored”, it is selected from the “Browse” page. When the call recording is found, the scorecard templates associated to this groups may be used to evaluate the call. Once the call is “scored”, the scorecard results are saved for retrieval or reporting purposes.

The Call Recording Portal currently provides reports on scorecard results with several filtering options providing great flexibility in reporting statistics.

2 Getting Started: Creating and Importing Scorecards

2.1 Creating Scorecards

Scorecards can be created in Excel and imported into the call recording portal via a comma separated value (or CSV) file. The structure of that file dictate the scorecards questions, weights, and capabilities.

Scorecard File Format Overview

Each scorecard is composed of 5 distinct objects:

- **Scorecard Name** -- This is the name of the Scorecard as it will appear inside the call recording portal
- **Group** -- This is the identifier of the Group name inside the call recording portal where this scorecard should appear. If you are unsure of your group name contact your Administrator.
- **Section** – Each scorecard can be composed of multiple sections to logically organize the questions. For instance, the scorecard may have a section that contains questions about the opening of the call and another section with questions about the closing of the call.
- **Question** – Each question will have a unique entry underneath its parent section.
- **Answer** – Each answer will have a unique entry underneath its parent question.

A scorecard can contain 1 or more sections each with 1 or more questions. Each question can have one or more answers that are assigned a score.

Scoring Answers

Each question can have 1 more answers that the scorer selects from a drop-down list. The answer can be any text value such as Yes/No or Y/N or whatever is appropriate for the question. Each answer is given a score. For example, if the scorer selects “Yes” the question is given a score of 1 and if the scorer selects “No” this question is given a score of 0.

A given answer can also cause the entire question to be “excluded” from the score. For instance, if the question was about asking for permission to place the caller on hold and the caller wasn’t placed on hold, then this question can be excluded from this call’s score. In this example, an answer of “N/A” can be placed in the scorecard and when that is selected by the scorer, this question is ignored when tabulating the score.

Weights

Weights are used when calculating the score and can be used to assign heavier emphasis by serving as a multiplier when the score is tabulated. A higher weight denotes a higher area of emphasis. Weights can be assigned at both a question AND a section level. A weight acts like a multiplier when the score is tabulated:

A question with a weight of 2 is worth twice as much as a question with a weight of 1. Each question’s score is multiplied by the weight of the question when calculating the score.

A section with a weight of 2 is worth twice as much as a section with a weight of 1. All of the scores in each section are added up and then multiplied by the weight of the section when calculating the score.

The overall score is calculated based upon the total score possible on that survey (the call got a perfect score).

- Each question has a weight (default of 1)
- Each answer has a score that is multiplied by the question's weight
- Each section has a weight (default of 1)
- The sum of the answers in that section are multiplied by the section's weight
- Therefore, total score possible is the sum of each Section as follows:
    - Section 1 – the cumulative sum (of the highest value answer to each question multiplied by that question's weight) multiplied by the section's weight
    - Section 2 – the cumulative sum (of the highest value answer to each question multiplied by that question's weight) multiplied by the section's weight
    - Section N – the cumulative sum (of the highest value answer to each question multiplied by that question's weight) multiplied by the section's weight

The scorecard's question response values, question weights, and section weights need to be taken into consideration when designing the scorecard

CSV File Format Summary

A single CSV file may include multiple scorecards

Entries are hierarchical and at least one entry is required at each level, i.e. a scorecard that does not have separate sections must define at least 1 section.

A line starting with the # symbol is considered to be a comment

A non-comment line must contain comma-separated fields. The number of fields on each line depends on the type of entry. The valid entries include:

- Scorecard, name, comments
- Group, name
- Section, name, weight, comments
- Question, name, weight, comments
- Answer, description, value, excluded, autofail, comments

About the fields:

- "name", "description" and "comments" fields are text strings. The string fields must be surrounded by double quotes, e.g. "Group Name". To support commas and double-quotes in this field, the \ shall be interpreted as an escape character.
- "weight" fields are decimal values with a default value of 1.0
- "value" field is an integer with no default value

- "excluded" and "autofail" are booleans, and accept values of true or false, yes or no, 0 or 1 with a default value of false
- keywords (Group, Scorecard, Question, Answer) are case-insensitive and are mandatory at the beginning of the line.
- The “name”, “description” and “value” fields are mandatory. The remaining fields are optional and must be represented by a comma separator.

Example “Customer Service QA Form” Excel file prior to exporting in CSV format

Scorecard	Customer Service QA Form		
Group	eip-1000000006 (SP)		
#			
Section	Opening Call	1	
Question	Used Standard Greeting - Intro	1	
Answer	No	0	
Answer	Yes	1	
Question	Confirmed Employer Name	2	
Answer	No	0	
Answer	Yes	1	
#			
Section	Information Verification / Data Collection	2	
Question	Verify Customer Name	2	
Answer	No	0	
Answer	Yes	1	
Question	Verify Customer Contact Info		

Answer	No	0	
Answer	Yes	2	
#			
Section	Establishing Purpose of Call	1	
Question	Reason for Call	1	
Answer	No	0	
Answer	Yes	1	
Question	Confirmed We can Help	1	
Answer	No	0	
Answer	Yes	3	
Question	Referred to KB on Web	1	
Answer	No	0	
Answer	Yes	1	
#			
Section	Customer Service Skills	2	
Question	Asked Hold Permission	1	
Answer	No	0	
Answer	Yes	1	
Answer	NA	0	TRUE
Question	Use Customer First Name	1	
Answer	No	0	
Answer	Yes	1	
Question	Confirmed Issue Resolved	2	
Answer	No	0	
Answer	Yes	3	

Question	Clarified Next Steps	2	
Answer	No	0	
Answer	Yes	1	

Example "Customer Service QA Form" CSV file

```
Scorecard,"Customer Service QA Form",,,,
Group,eip-1000000006 (SP),,,,
#,,,,,
Section,"Opening Call",1,,,
Question,"Used Standard Greeting - Intro",1,,,
Answer,No,0,,,
Answer,Yes,1,,,
Question,"Confirmed Employer Name",2,,,
Answer,No,0,,,
Answer,Yes,1,,,
#,,,,,
Section,"Information Verification / Data Collection",2,,,
Question,"Verify Customer Name",2,,,
Answer,No,0,,,
Answer,Yes,1,,,
Question,"Verify Customer Contact Info",,,,
Answer,No,0,,,
Answer,Yes,2,,,
#,,,,,
Section,"Establishing Purpose of Call",1,,,
Question,"Reason for Call",1,,,
Answer,No,0,,,
Answer,Yes,1,,,
Question,"Confirmed We can Help",1,,,
Answer,No,0,,,
Answer,Yes,3,,,
Question,"Referred to KB on Web",1,,,
Answer,No,0,,,
```

```
Answer,Yes,1,,,
#,,,,,
Section,"Customer Service Skills",2,,,
Question,"Asked Hold Permission",1,,,
Answer,No,0,,,
Answer,Yes,1,,,
Answer,NA,0,TRUE,,
Question,"Use Customer First Name",1,,,
Answer,No,0,,,
Answer,Yes,1,,,
Question,"Confirmed Issue Resolved",2,,,
Answer,No,0,,,
Answer,Yes,3,,,
Question,"Clarified Next Steps",2,,,
Answer,No,0,,,
Answer,Yes,1,,,
```

2.2 Importing Scorecards

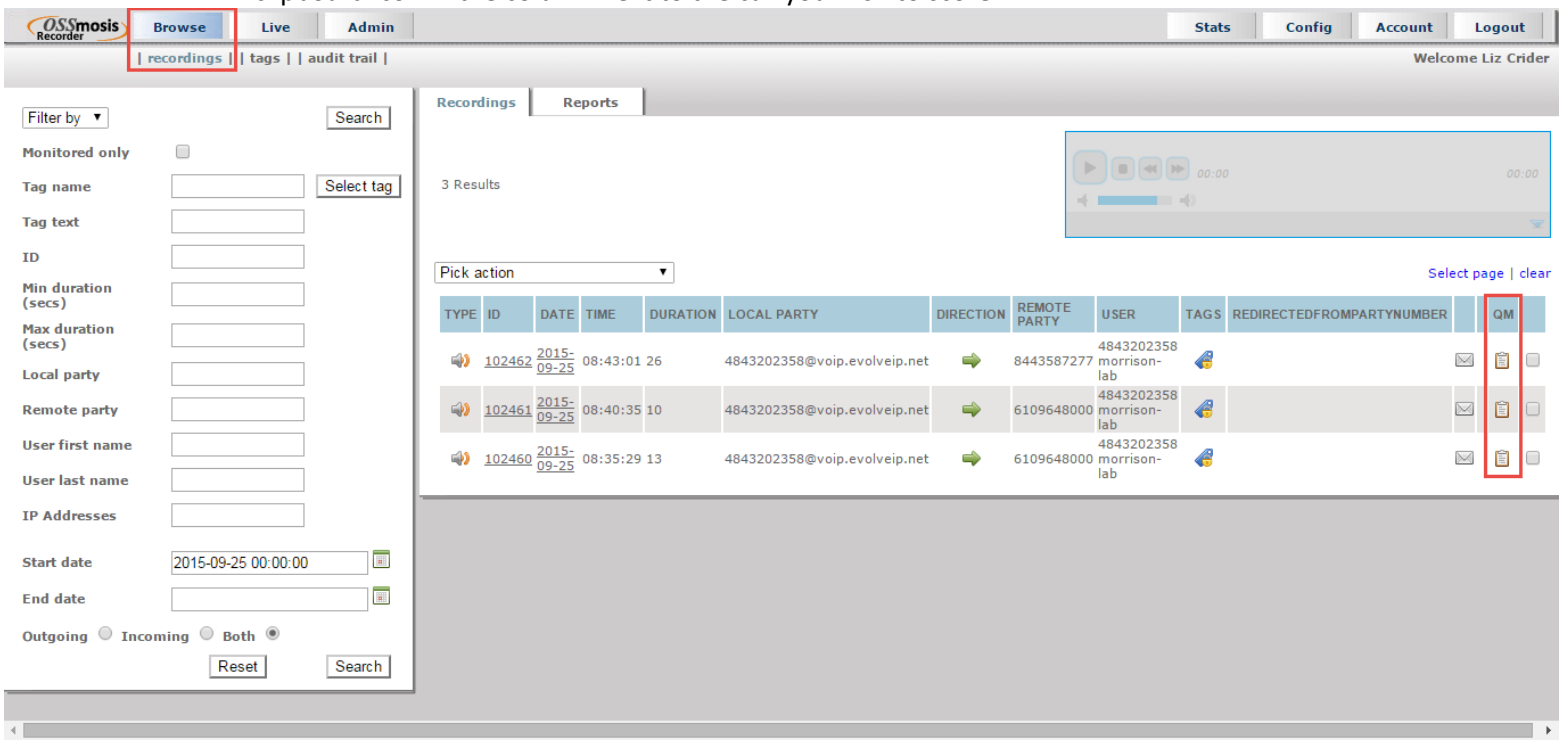
To import a scorecard, please contact EvolveIPs Support or a Call Center Specialist. Importing Scorecards will be made available to customers once built within the new OSSmosis Call Recording UI.

3 Scoring Calls

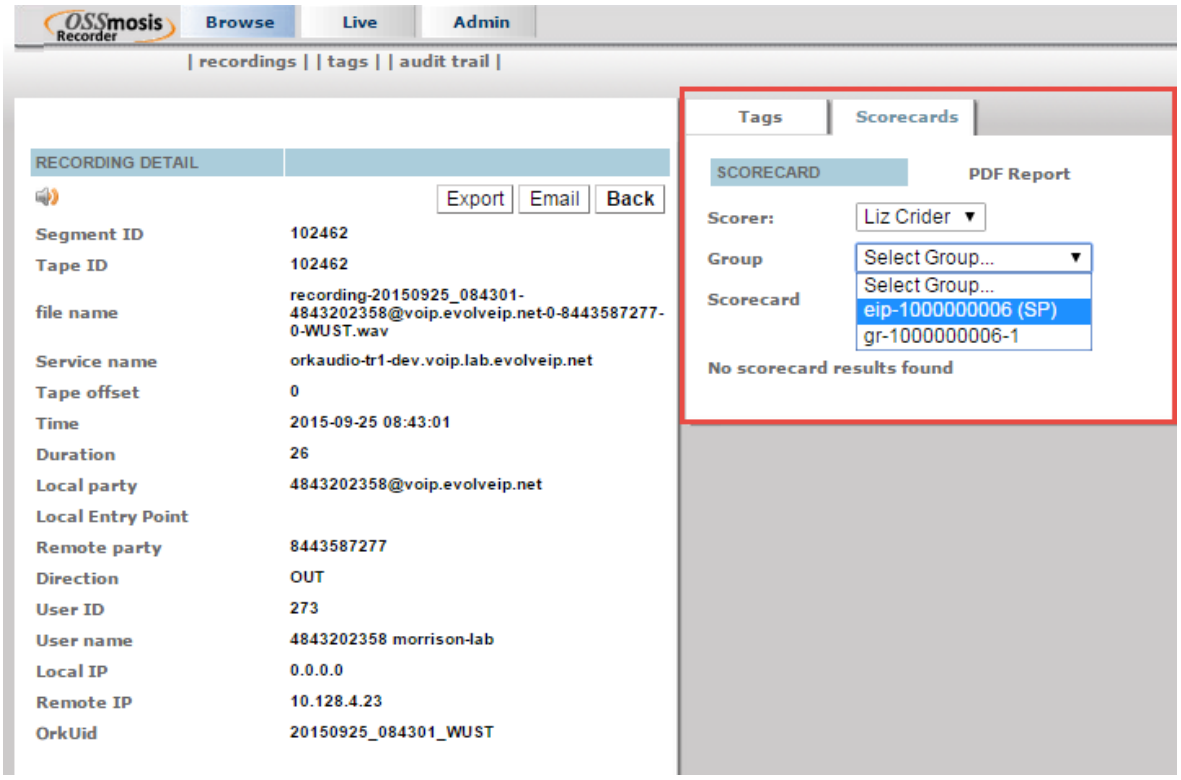
Once the scorecards have been added you are ready to begin scoring calls.

3.1 Select the *Browse Tab* and *Recordings.*

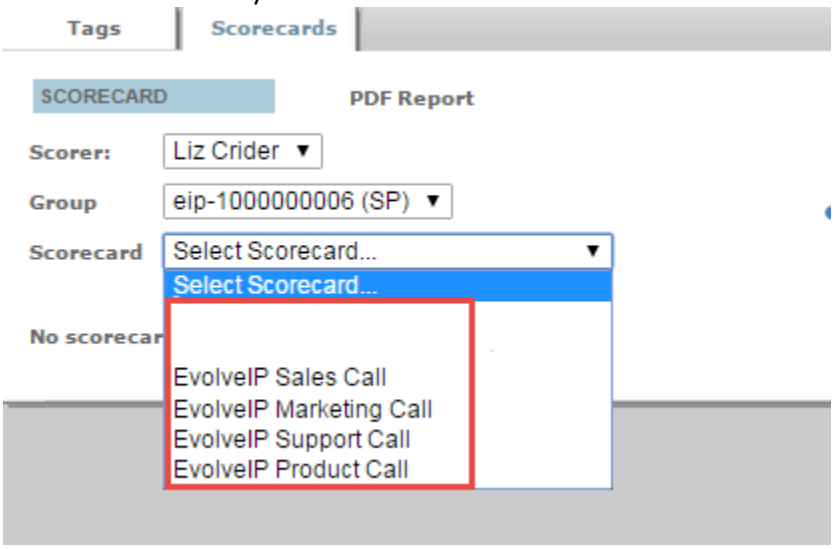
3.2 In the section of the screen where the recordings are held you will see a *QM* column. Select the clipboard icon in the column next to the call you wish to score.



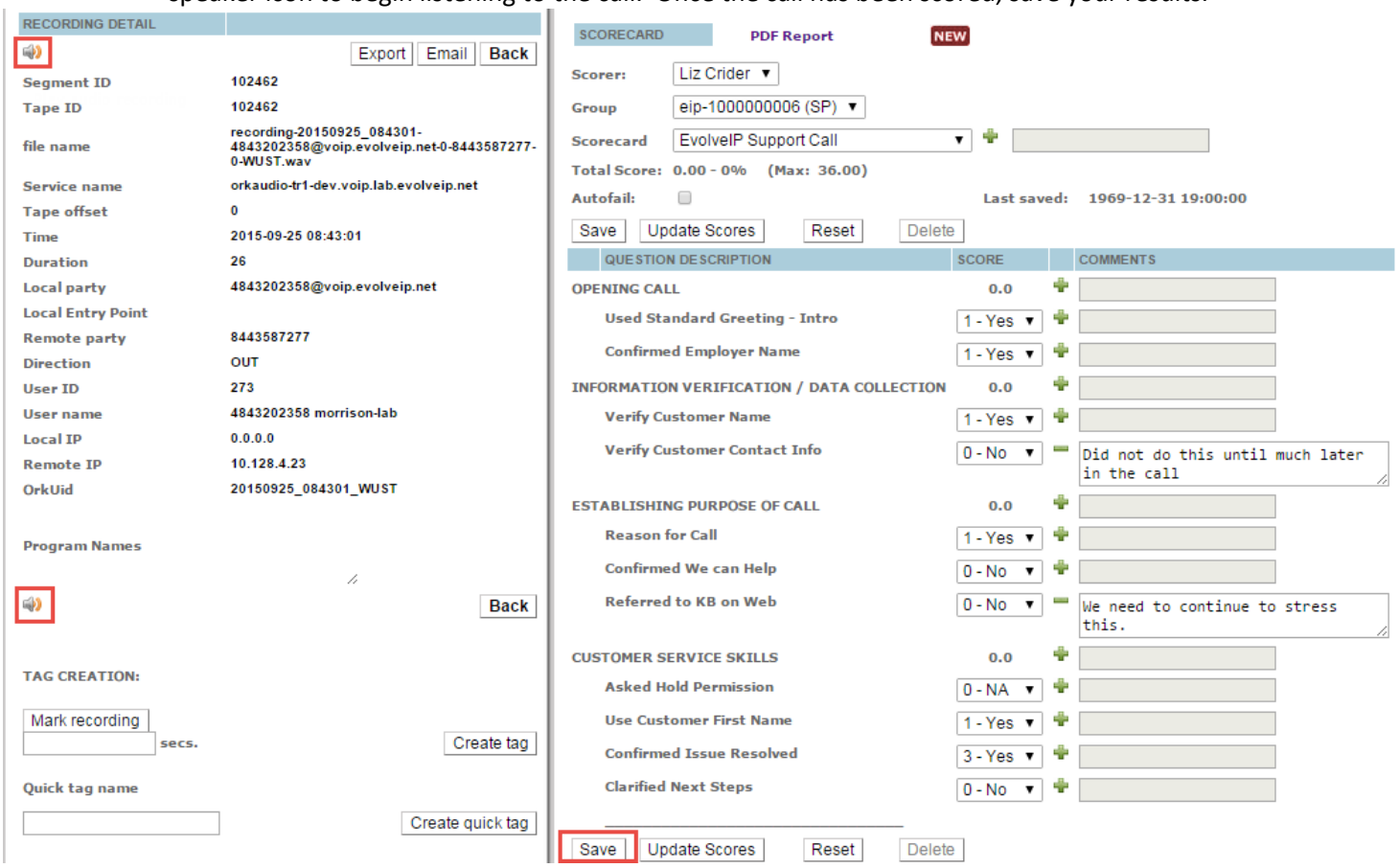
3.3 Another page will appear with the *Scorecards* tab selected. Select your correct Group in which your scorecards have been stored.



3.4 Once a group has been selected your scorecard options will appear in the Scorecard drop down. Select the scorecard you wish to use.



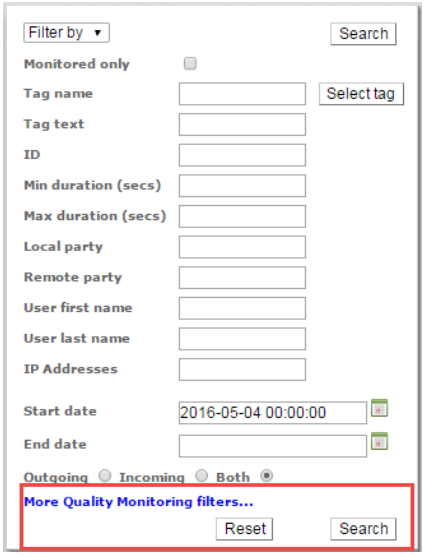
3.5 The scorecard will populate in the same view. When you are ready to score the call, select the speaker icon to begin listening to the call. Once the call has been scored, save your results.



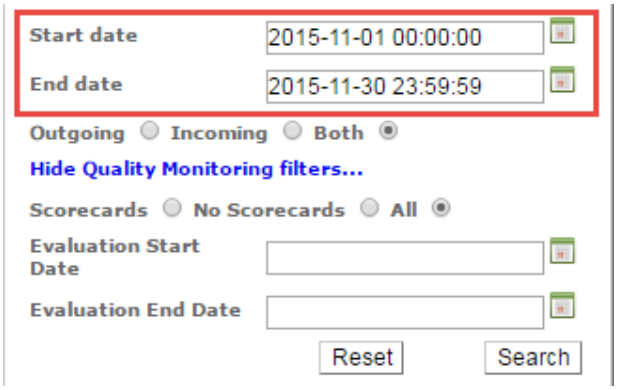
4 Searching for Calls with Scorecards

Recorded calls can be search and filtered by Enterprise or Group that have scorecards attached to them.

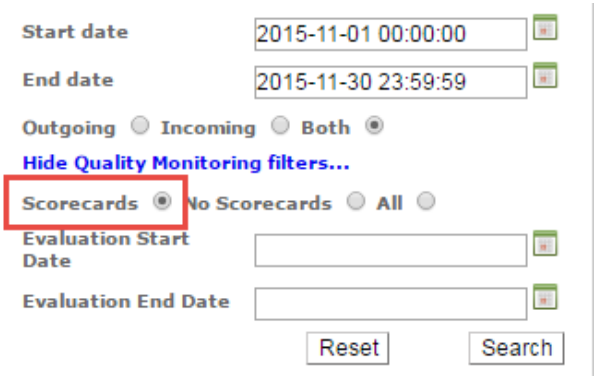
4.1 Select "More Quality Monitoring filters"



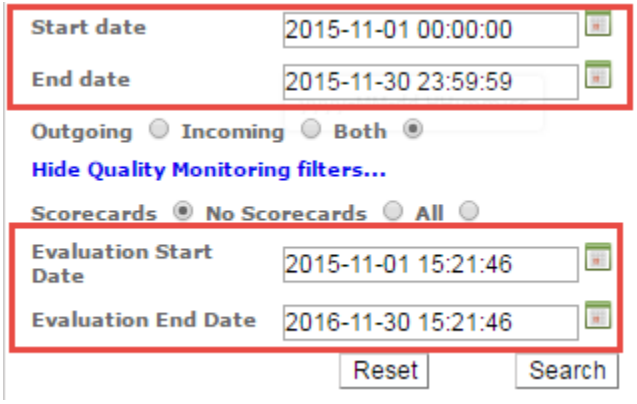
4.2 In the search box enter in the Start date and End date for your search criteria.



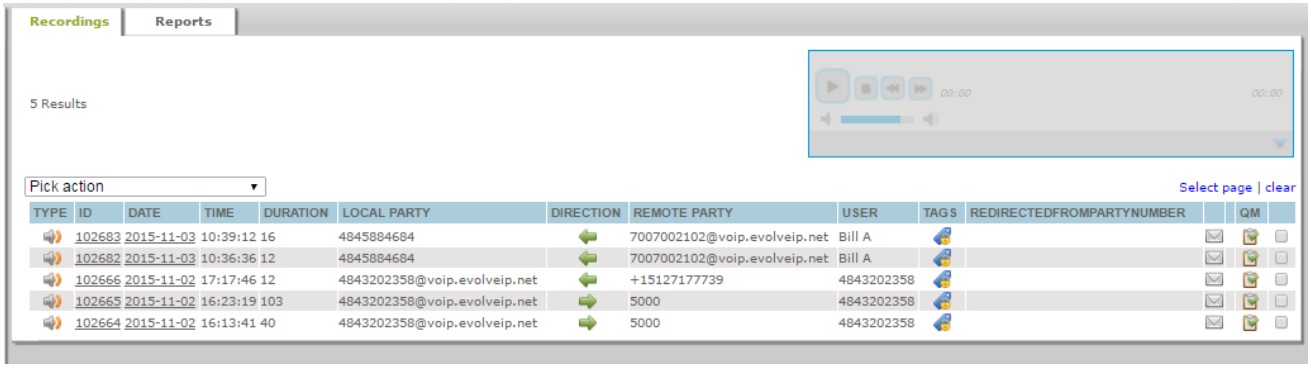
4.3 Choose Scorecards to pull calls only with score cards attached.



4.4 Enter in the same Evaluation Start Date and End Date that was entered above.



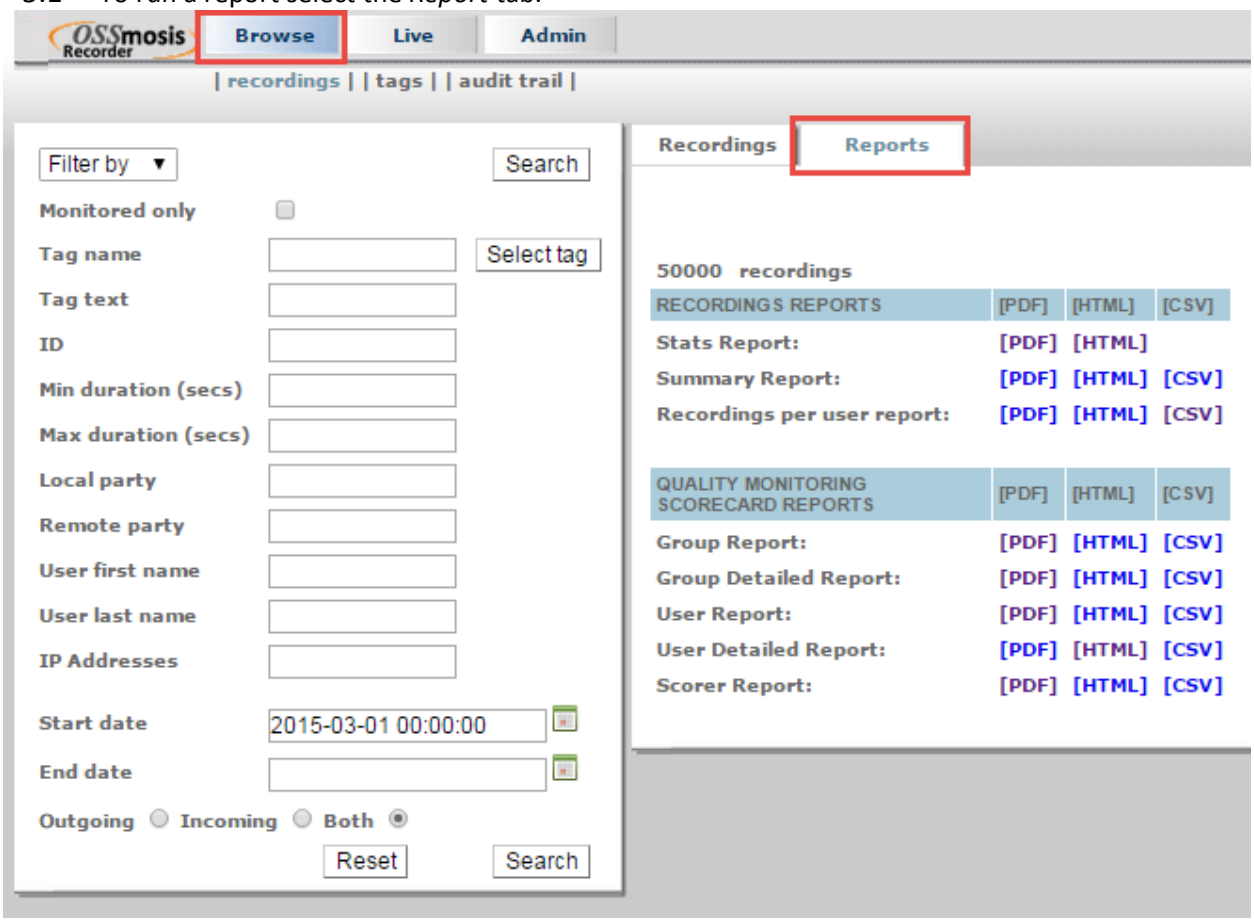
4.5 Select Search. All call with Scorecard attached will pull into the recordings window.



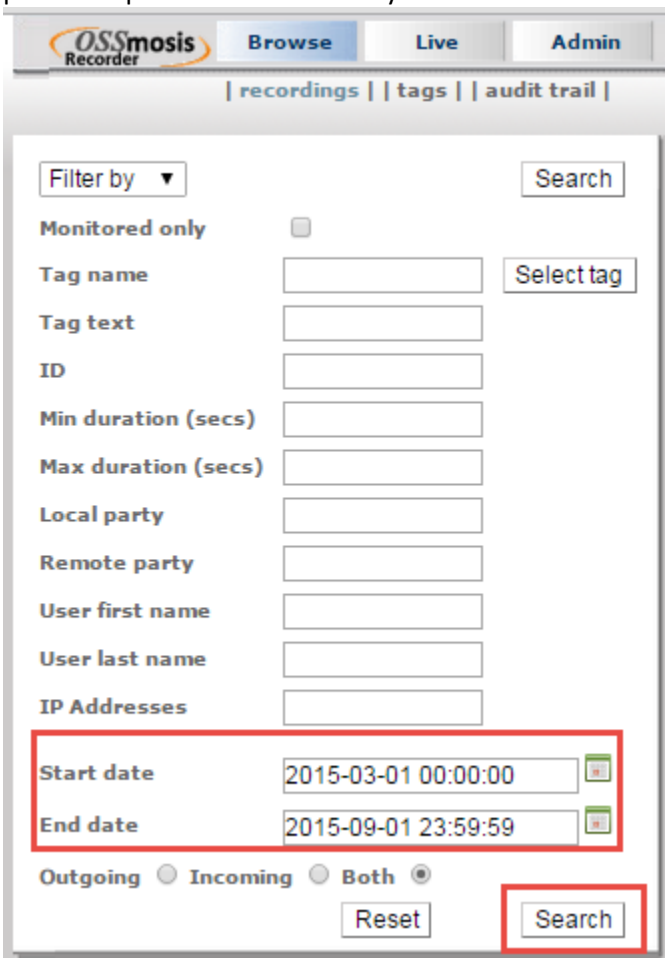
5 Running Reports

You have access to five different reports within the Call Recording Portal: Group Report, Group Detailed Report, User Report, User Detailed Report, and Scorer Report. Each report can be run in PDF, HTML and CSV.

5.1 To run a report select the *Report* tab.



5.2 In the search field enter in the start date or start and end date for the times in which you wish to pull the reports from followed by *Search.*



5.3 Locate the report and select the file type you wish to generate the report in. This will populate in another tab or download the CSV file.

Quality Monitoring

QM Group Report

Group Name	Scored Calls	Min Score		Avg Score		Max Score	
eip-1000000006 (SP)	9	16.00	44%	27.67	78%	36.00	100%