

Research

Anya

EDS

Quality Assurance, Team Lead

responsible for 19 Agents

Requirements per Agent: 1 live Eval, 2 recorded evals per week.

Mark

Fujitsu, EDS, Enghouse

Team Lead (current) responsible for 5 Agents. Previously responsible for 40+ Agents

Requirements per Agent: 1 Live, 2 recorded per week

Deb

Call Centre Guru Responsible for 20+ Agents

Requirements per Agent: 1 Live, 1 recorded per week

Why Team Leads/Managers do Live Evaluations.

Live evaluations are possibly less thorough but far more time efficient than recorded evaluations.

Scenario:

Bob the Team lead is responsible for ten Agents.

Bob has to evaluate 2 calls per agent per week.

A 3 minute call will take on average 15 minutes to evaluate, with rewinding and double checking. This is administrative processing time only. Possible disputes with the Agent (A. ...I didn't say that, B. yes you did, come and listen to this...) will add considerably more time.

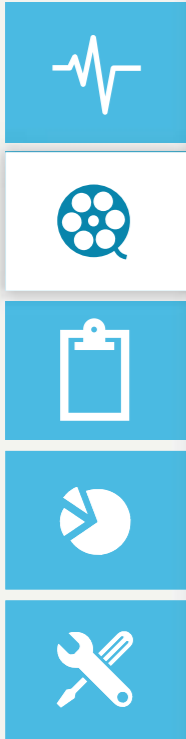
10 Agents x two evaluations per week @ 15 minutes per evaluation = **5 hours**.

A Live 3 minute evaluation is possibly less thorough but is far more efficient. No disputes to debate as the manager is there and listening real time.

Live evaluations are practical for good agents, agents you are monitoring, coaching etc (evaluating at the same time).



Recordings



« Search Evaluations

User

Leon

Scorecard

Any Scorecard

Date

Any Date

Duration

Any Duration

Direction

Any Direction

Details

Any Details

Flags

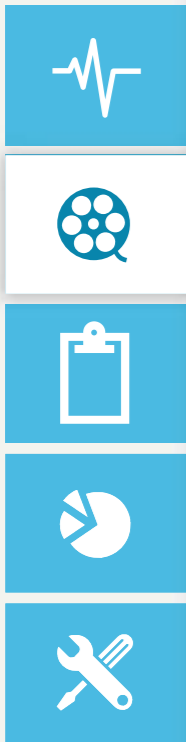
Any Flags

Search

User Name	Evaluator	Scorecard	Status	Progress	Score	Created Date
Search for: My Department, 02/03/16 - 04/03/16						
Maggie May		10:04 a.m	23 Sept	Support Test 1	+14258276156	Jake Gillespe
Maggie May		10:56 a.m	21 Sept			
Maggie May		10:04 a.m	23 Sept	Support Test 1	+14258276156	Jake Gillespe
Maggie May		10:56 a.m	21 Sept			
Maggie May		10:56 a.m	8 Oct	Support Test 1	+14258199473	Margaret McD
Maggie May		3:21 p.m	7 Oct	Support Test 1	+14736488156	Ellen McKintire
Maggie May		9:40 a.m	24 Sept	Support Test 1	+14258222799	Christie Hogg
Maggie May		9:40 a.m	24 Sept	Support Test 1	+14258334666	Jerome Killen
Maggie May		10:56 a.m			814256474971	
Maggie May		10:04 a.m		t 1	+14258276156	Jake Gillespe
Maggie May		10:56 a.m				
Maggie May		10:56 a.m		t 1	+14258199473	Margaret McD
Maggie May		3:21 p.m		t 1	+14736488156	Ellen McKintire
Maggie May		9:40 a.m		t 1	+14258222799	Christie Hogg
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Maggie May		10:56 a.m	21 Sept			
Maggie May		10:56 a.m	8 Oct	Support Test 1	+14258199473	Margaret McD
Maggie May		3:21 p.m	7 Oct	Support Test 1	+14736488156	Ellen McKintire



Recordings



« Search Evaluations

User

Leon

Scorecard

Any Scorecard

Date

Any Date

Duration

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Direction

Any Direction

Details

Any Details

Flags

Any Flags

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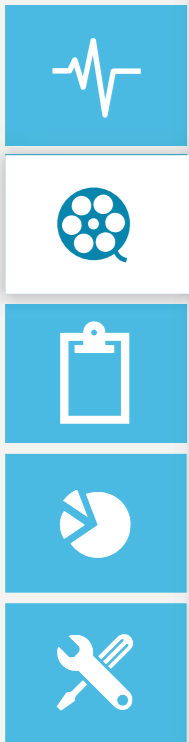
Play
Maggie May

Start Evaluation
Maggie May

Delete
Maggie May



Recordings



« Search Evaluations

User

Leon

Scorecard

Any Scorecard

Date

Any Date

Duration

Any Duration

Direction

Any Direction

Details

Any Details

Flags

Any Flags

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Using the 80/20 use case, the majority of team leads / managers will have a standard scorecard which they will evaluate agents against from week to week.

Displaying a default scorecard on selection of an Agent/recording on the Agents Evaluation landing page, instead of the Team Lead having to select the same scorecard time after time will increase ease of work flow efficiency, saving valuable seconds, minutes, hours in the users day, days in the month...



Evaluations

Maggie May

Select recording to Evaluate

Add Scorecard...

Save



Add Media

Inbound Call (default)

Mode : **Draft**Evaluator : **System Administrator**

type a note here...

Progress 0 %

Score 0 %



07:22:51:357

Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341

Inbound Call

1	Identified company name/product line name. Used Welcome to (appropriate brand response)						Yes	No
2	Displayed a good pace/pitch of speech. Did not race through the call opening or use a monotonous or singsong tone when greeting the caller.	1	2	3	4	5	N/A	
3	Identified company name/product line name. Used Welcome to (appropriate brand response)						Yes	No
4	Acknowledged with a bridge. Used either an appropriate positive statement or an empathy statement to reassure the caller that we are able to assist them. E.g. Certainly, with pleasure or I am sorry to hear that.						Yes	No
5	Established the callers name. If the caller has not offered their name, the agent must ask for their name. This step can be included with the acknowledgement statement if suitable.						Yes	No
6	Correct pronunciation of name used. It is professional and polite to establish the correct pronunciation of the callers name.						Yes	No



Evaluations

Maggie May

Select recording to Evaluate

Select Scorecard...

- ☐ Scorecard 1
- ☐ Scorecard 2
- ☐ Spring Campaign to improve CS

type a note here...

Progress 0 %



Score 0 %



Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341

Inbound Call

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6	Correct pronunciation of name used. It is professional and polite to establish the correct pronunciation of the callers name.						Yes	No



Evaluations

Maggie May

Select recording to Evaluate

Add Scorecard...



Filter view

Save



Add Media

Media

Phone



Date/Time

Any Date/Time



Duration

Any Duration



Direction

Any Direction



Flags

Any Flags



Details

Any



Search

Agent

Start Time

Queue

Caller ID #

Search for: Phone, Any Date - Time

	Maggie May	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe
	Maggie May	10:56 a.m	21 Sept		
	Maggie May	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe
	Maggie May	10:56 a.m	21 Sept		
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	Maggie May	3:21 p.m	7 Oct	Support Test 1	+14736488156 Ellen McKint
	Maggie May	9:40 a.m	24 Sept	Support Test 1	+14258222799 Christie Hog
	Maggie May	10:0		Support Test 1	+14258276156 Jake Gillespe
	Maggie May	10:5			
	Maggie May	10:0		Support Test 1	+14258276156 Jake Gillespe
	Maggie May	10:5		Support Test 1	+14258199473 Margaret Mc
	Maggie May	10:5		Support Test 1	+14258199473 Margaret Mc
	Maggie May	3:2		Support Test 1	+14736488156 Ellen McKint
	Maggie May	9:40 a.m	24 Sept	Support Test 1	+14258222799 Christie Hog
	Maggie May	9:40 a.m	24 Sept	Support Test 1	+14258334666 Jerome Kille
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Play

Maggie May

Add Media

Maggie May

Delete

Maggie May



Evaluations

Maggie May

Select recording to Evaluate

Add Scorecard...



Save



Inbound Call (default)

Mode : **Draft**

Evaluator : **System Administrator**

type a note here...

Progress

0 %



Score

0 %



07:22:51:357

Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341



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Evaluations

Maggie May

Select recording to Evaluate

Table Options



Search Evaluations

Media

Agent

Scorecard

Description

Completion

Due by

Evaluations due **Today**



Leon Kingsley-Smith

June Campaign

Evaluation

Yesterday



Leon Kingsley-Smith

Inbound Call

Evaluation

Today

Evaluations due **Tomorrow**



Leon Kingsley-Smith

June Campaign

Evaluation

20%

Tomorrow



Shireen Chetty

Inbound Call

Evaluation

Tomorrow



Phillip Ngan

Inbound Call

Evaluation

20%

Tomorrow

Start Evaluation
Shireen Chetty

Delete Task
Shireen Chetty

Evaluations due **This Month**



Leon Kingsley-Smith

June Campaign

Evaluation

12%

14.10.16



Leon Kingsley-Smith

Inbound Call

Evaluation

12%

14.10.16

Leon Kingsley-Smith

Inbound Call

Evaluation

15.10.16



Shireen Chetty

Inbound Call

Evaluation

15.10.16

Phillip Ngan

Inbound Call

Evaluation

18.10.16



Andrew Reid

Inbound Call

Evaluation

18.10.16



Jono Agnew

Inbound Call

Review

21.10.16



Evaluations

Maggie May

Shireen Chetty

Select recording to Evaluate

Inbound Call Add Scorecard...

Filter view

Save



Add Media

Media

Phone

Date/Time

Any Date/Time

Duration

Any Duration

Direction

Any Direction

Flags

Any Flags

Details

Any

Search

Agent

Start Time

Queue

Caller ID #

Search for: Phone, Any Date - Time

☎	Shireen Chetty	10:04 a.m	23 Sept	Support Test 1	+14258276156	Jake Gillespe
☎	Shireen Chetty	10:56 a.m	21 Sept			
☎	Shireen Chetty	10:04 a.m	23 Sept	Support Test 1	+14258276156	Jake Gillespe
☎	Shireen Chetty	10:56 a.m	21 Sept			
☎	Shireen Chetty	10:56 a.m	8 Oct	Support Test 1	+14258199473	Margaret Mc
☎	Shireen Chetty	3:21 p.m	7 Oct	Support Test 1	+14736488156	Ellen McKint
☎	Shireen Chetty	9:40 a.m	24 Sept	Support Test 1	+14258222799	Christie Hog
☎	Shireen Chetty	10:0		Support Test 1	+14258276156	Jake Gillespe
☎	Shireen Chetty	10:5				
☎	Shireen Chetty	10:0		Support Test 1	+14258276156	Jake Gillespe
☎	Shireen Chetty	10:5				
☎	Shireen Chetty	10:5		Support Test 1	+14258199473	Margaret Mc
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Play
Shireen Chetty

Add Media
Shireen Chetty

Delete
Shireen Chetty



Evaluations

Maggie May

Shireen Chetty

[Select recording to Evaluate](#)

Add Scorecard...

Save



Add Media

Inbound Call (default)Mode : **Draft**Evaluator : **System Administrator**

Progress 0 %

Score 0 %



07:22:51:357

Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341

**Inbound Call**

1

Identified company name/product line name. Used Welcome to (appropriate brand response)

Yes

No

2

Displayed a good pace/pitch of speech. Did not race through the call opening or use a monotonous or singsong tone when greeting the caller.

1

2

3

4

5

N/A

3

Identified company name/product line name. Used Welcome to (appropriate brand response)

Yes

No

4

Acknowledged with a bridge. Used either an appropriate positive statement or an empathy statement to reassure the caller that we are able to assist them. E.g. Certainly, with pleasure or I am sorry to hear that.

Yes

No

5

Established the callers name. If the caller has not offered their name, the agent must ask for their name. This step can be included with the acknowledgement statement if suitable.

Yes

No

6

Correct pronunciation of name used. It is professional and polite to establish the correct pronunciation of the callers name.

Yes

No



Evaluations

Maggie May

Leon Kingsliegh-Smith

Select recording to Evaluate

Table Options



Media Agent

Scorecard

Description

Completion

Due by

Current Evaluations

	Leon Kingsley-Smith	June Campaign	Evaluation	12%	14.10.16
	Leon Kingsley-Smith	Inbound Call	Evaluation	75%	14.10.16
	Leon Kingsley-Smith	Inbound Call	Evaluation	41%	15.10.16
	Shireen Chetty	Inbound Call	Evaluation	35%	15.10.16
	Phillip Ngan	Inbound Call	Evaluation	30%	18.10.16
	Andrew Reid	Inbound Call	Evaluation	20%	18.10.16
	Jono Agnew	Inbound Call	Review	18%	21.10.16

Search Evaluations





Evaluations

Maggie May

Leon Kingsliegh-Smith

Select recording to Evaluate

Add Scorecard...

Save



Inbound Call (default)

Mode : **Draft**

Evaluator : **System Administrator**

type a note here...

Progress 0 %

Score 0 %



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Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341



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1

2

3

4

5

N/A

3

Identified company name/product line name. Used Welcome to (appropriate brand response)

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No

4

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Yes

No

5

Established the callers name. If the caller has not offered their name, the agent must ask for their name. This step can be included with the acknowledgement statement if suitable.

Yes

No

6

Correct pronunciation of name used. It is professional and polite to establish the correct pronunciation of the callers name.

Yes

No



Real-time View

Table Options



Media Agent



	Leon Kingsley-Smith	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe	5:52
	Leon Kingsley-Smith	10:56 a.m	21 Sept			
	Leon Kingsley-Smith	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe	5:52
	Shireen Chetty	10:56 a.m	21 Sept			
	Phillip Ngan	10:56 a.m	8 Oct	Support Test 1	+14258199473 Margaret McDonald	6:15
	Andrew Reid	3:21 p.m	7 Oct	Support Test 1	+14736488156 Ellen McKintire	14:43
	Jono Agnew	9:40 a.m	24 Sept	Support Test 1	+14258222799 Christie Hogg	2:04:42
	Jira Tulip	9:40 a.m	24 Sept	Support Test 1	+14258334666 Jerome Killen	2:04:42
	Leon Kingsley-Smith	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe	5:52
	Leon Kingsley-Smith	10:56 a.m	21 Sept			
	Leon Kingsley-Smith	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe	5:52
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	Andrew Reid	3:21 p.m	7 Oct	Support Test 1	+14736488156 Ellen McKintire	14:43
	Jono Agnew	9:40 a.m	24 Sept	Support Test 1	+14258222799 Christie Hogg	2:04:42
	Jira Tulip	9:40 a.m	24 Sept	Support Test 1	+14258334666 Jerome Killen	2:04:42
	Leon Kingsley-Smith	10:04 a.m	23 Sept	Support Test 1	+14258276156 Jake Gillespe	5:52
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	Phillip Ngan	10:56 a.m	8 Oct	Support Test 1	+14258199473 Margaret McDonald	6:15
	Andrew Reid	3:21 p.m	7 Oct	Support Test 1	+14736488156 Ellen McKintire	14:43

Monitor
Leon Kingsley-Smith

Start Evaluation
Leon Kingsley-Smith

Delete Task
Leon Kingsley-Smith



Evaluations

Maggie May

Leon Kingsliegh-Smith

Select recording to Evaluate

Add Scorecard...

Save



Inbound Call (default)

Mode : **Draft**

Evaluator : **System Administrator**

type a note here...

Progress 0 %

Score 0 %



07:22:51:357

Thurs 15, 2016 10:15 am Caller ID 00 64 9 875 3341



Inbound Call

1

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Yes

No

2

Displayed a good pace/pitch of speech. Did not race through the call opening or use a monotonous or singsong tone when greeting the caller.

1

2

3

4

5

N/A

3

Identified company name/product line name. Used Welcome to (appropriate brand response)

Yes

No

4

Acknowledged with a bridge. Used either an appropriate positive statement or an empathy statement to reassure the caller that we are able to assist them. E.g. Certainly, with pleasure or I am sorry to hear that.

Yes

No

5

Established the callers name. If the caller has not offered their name, the agent must ask for their name. This step can be included with the acknowledgement statement if suitable.

Yes

No

6

Correct pronunciation of name used. It is professional and polite to establish the correct pronunciation of the callers name.

Yes

No