



SmartAgent Training

Bootcamp – Quality Assurance

Version	Date	Author	Changes
2.8	19/08/2021	Paul Egan & Aliona Radetskaya	QA Question types

Introduction

The purpose of this guide is to provide you with an introduction to using the Quality Assurance Module of SmartAgent.

About SmartAgent Quality Assurance

SmartAgent Quality Assurance is a modular addition to the standard SmartAgent build that can help organisations monitor call quality and coach agent performance in an integrated and co-ordinated way.

Call Monitoring templates are easy to create and can ensure a consistent approach is taken when listening to calls for Coaching and Quality purposes.

You can use a range of different Question types to create a bespoke call monitoring or call coaching form to suit your organisation. Agents can see their own evaluated scores for personal development.

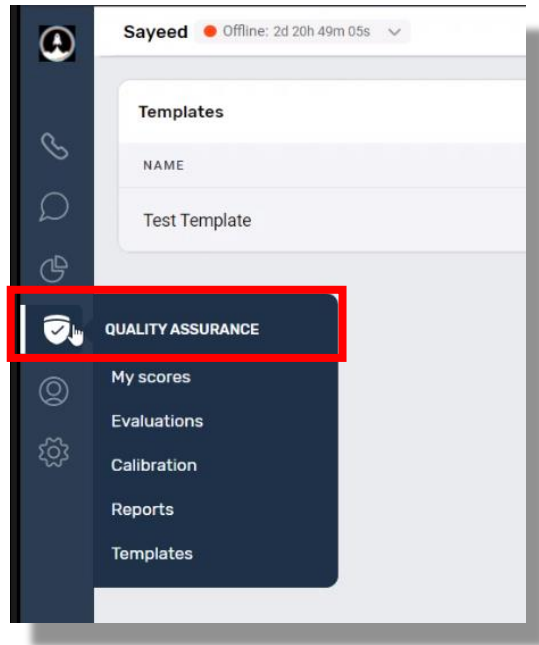
The Call Quality activity can also be further checked using the Calibration function to ensure consistency of approach or to provide an additional check on the call monitoring activity.

Agenda

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Setting up Quality Assurance – Basic Navigation

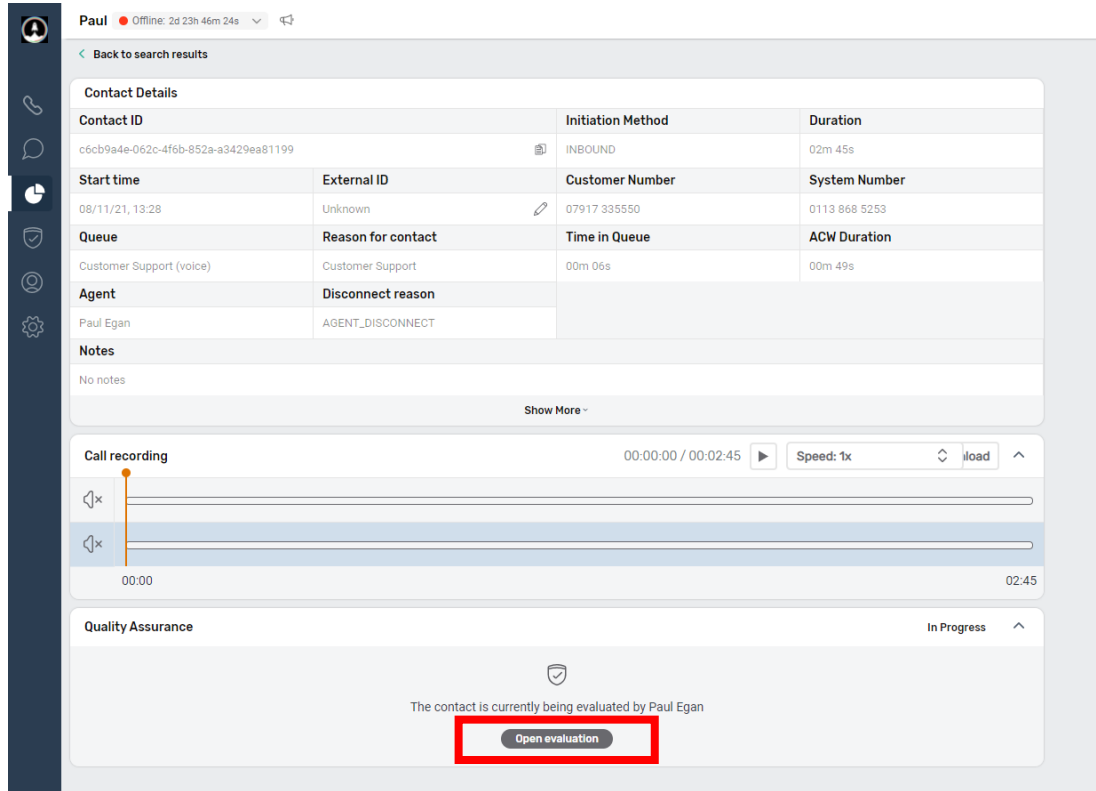
The Quality Assurance module is accessed from the main side menu, if you have the necessary permissions in your Security Profile.



From this menu individuals can look at their own scores, conduct evaluations & calibrations, view QA reports or create and edit templates, depending on their permission level.

Evaluating a contact using an existing form

When a supervisor uses the “Contact search” function to search for a particular call recording or transcript and they have access to the QA module then they will see an additional Quality Assurance field below the contact details.



Contact Details

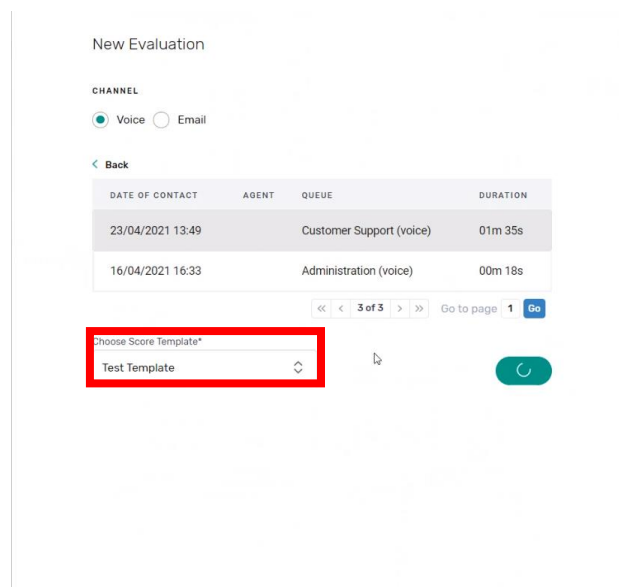
Contact ID	Initiation Method	Duration
c6cb9a4e-062c-4f6b-852a-a3429ea81199	INBOUND	02m 45s
Start time	External ID	Customer Number
08/11/21, 13:28	Unknown	07917 335550
Queue	Reason for contact	Time in Queue
Customer Support (voice)	Customer Support	00m 06s
Agent	Disconnect reason	ACW Duration
Paul Egan	AGENT_DISCONNECT	00m 49s

Notes
No notes

Call recording
00:00:00 / 00:02:45
Speed: 1x

Quality Assurance
In Progress
The contact is currently being evaluated by Paul Egan
Open evaluation

If you select the “Open Evaluation” button you will be able to evaluate the contact, once you have selected the evaluation form to be used.



New Evaluation

CHANNEL
☒ Voice ☐ Email

< Back

DATE OF CONTACT	AGENT	QUEUE	DURATION
23/04/2021 13:49		Customer Support (voice)	01m 35s
16/04/2021 16:33		Administration (voice)	00m 18s

« < 3 of 3 > » Go to page 1 Go

Choose Score Template*
Test Template

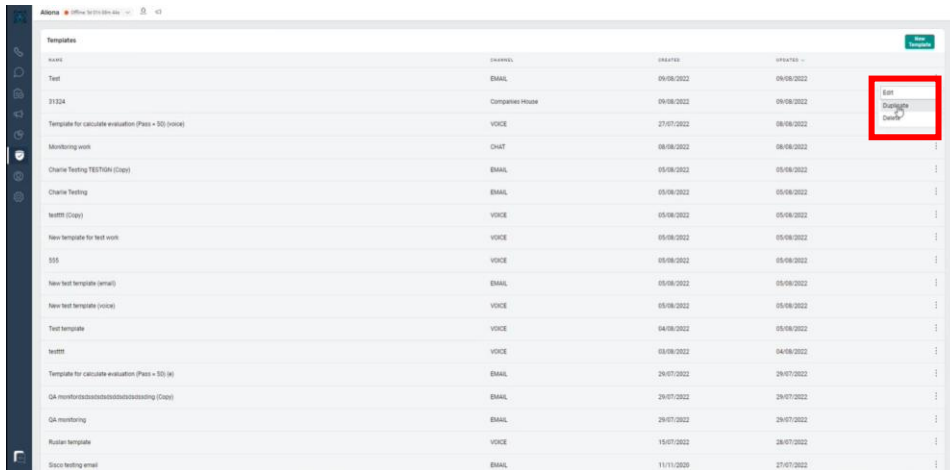
Save

You will need to select the scoring template from the dropdown box.

Creating an Evaluation Form template

From the Quality Assurance Menu if you select the Templates option you will be presented with a list of current templates loaded into your setup.

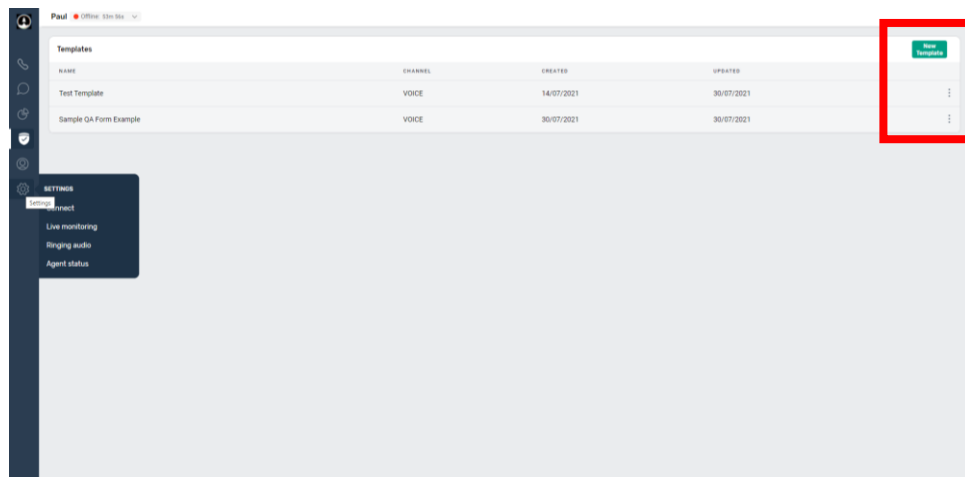
You can select the three dots at the right hand edge of the template details to edit an existing template, duplicate it or delete it.



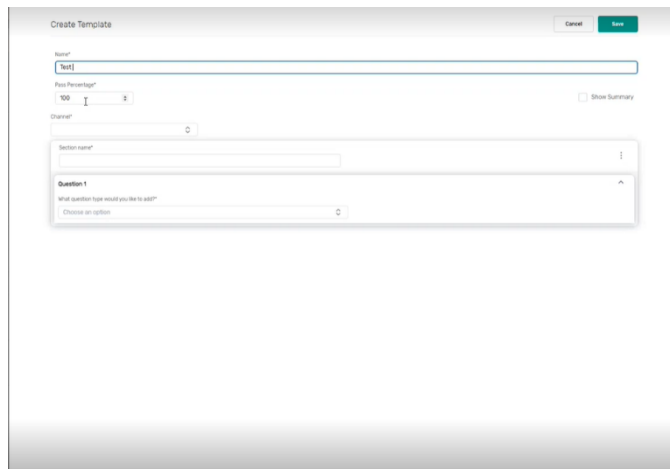
NAME	CHANNEL	CREATED	UPDATED	
Test	EMAIL	09/08/2022	09/08/2022	⋮
31124	Companee House	09/08/2022	09/08/2022	⋮
Template for calculate evaluation (Pass = 50) (voice)	VOICE	27/07/2022	08/08/2022	⋮
Monitoring work	CHAT	08/08/2022	08/08/2022	⋮
Charlie Testing TESTIGH (Copy)	EMAIL	05/08/2022	05/08/2022	⋮
Charlie Testing	EMAIL	05/08/2022	05/08/2022	⋮
testtt (Copy)	VOICE	05/08/2022	05/08/2022	⋮
New template for test work	VOICE	05/08/2022	05/08/2022	⋮
SSS	VOICE	05/08/2022	05/08/2022	⋮
New test template (email)	EMAIL	05/08/2022	05/08/2022	⋮
New test template (voice)	VOICE	05/08/2022	05/08/2022	⋮
Test template	VOICE	04/08/2022	05/08/2022	⋮
testtt	VOICE	03/08/2022	04/08/2022	⋮
Template for calculate evaluation (Pass = 50) (x)	EMAIL	29/07/2022	29/07/2022	⋮
QA monitoringtesttttesttttesttttesttttesttt (Copy)	EMAIL	29/07/2022	29/07/2022	⋮
QA monitoring	EMAIL	29/07/2022	29/07/2022	⋮
Russian template	VOICE	15/07/2022	28/07/2022	⋮
Spice testing email	EMAIL	11/11/2020	27/07/2022	⋮

If you Select the Duplicate option, you can then rename this template and edit this new copy if you just want to make minor changes to a form.

To create a new template select the green button.

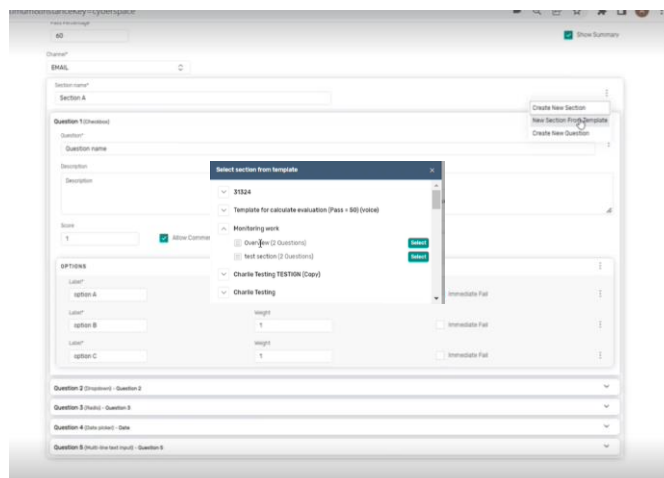


When you select the Create Template option you are presented with a skeleton form with just one question, upon which to build your form as per your requirements. Here you will specify the template title and passmark percentage required. You can also add in an overall summary field if required.



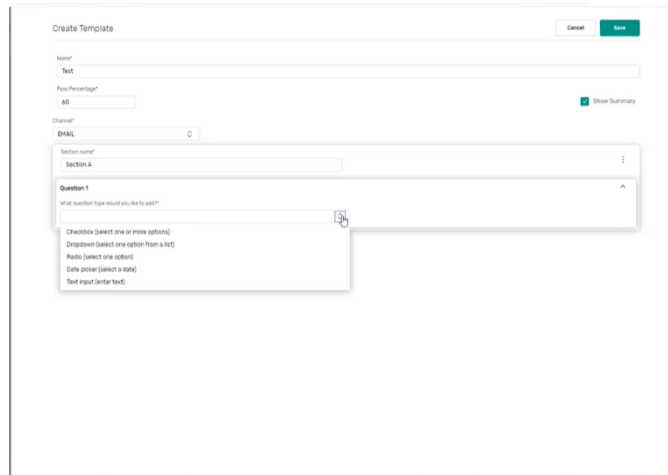
You can create particular forms for each channel or type and you should use a naming convention as each template will need it's own unique name.

By clicking on the three dots in the section title field, you can add further sections or copy over sections and questions from other templates. So you may want to consider creating a set of Modular sections that may apply across different channels or departments.



Alternatively you can create a form with many sections manually with multiple questions and question types within each section. So, for example, you may have an opening section with questions about the greeting, use of ID&V etc

You can create a new section, move it around and change it's order and delete a section from the three dot menu. **We do recommend saving the form as you go as it will time-out if no activity occurs.**



The screenshot shows the 'Create Template' form. The 'Question 1' section is expanded, showing a dropdown menu for question types. The options are: Checkbox (select one or more options), Dropdown (select one option from a list), Radio (select one option), Date picker (select a date), and Text input (enter text). The 'Checkbox' option is currently selected.

There are a number of different question types you can use as shown above. When you create a question, it will default to offer 2 scoring options, but you can always add more by selecting the three dots menu and select the “add option”. You can also specify if a particular answer is an “Immediate fail”, no matter what the score. This might be used when dealing with compliance issues.

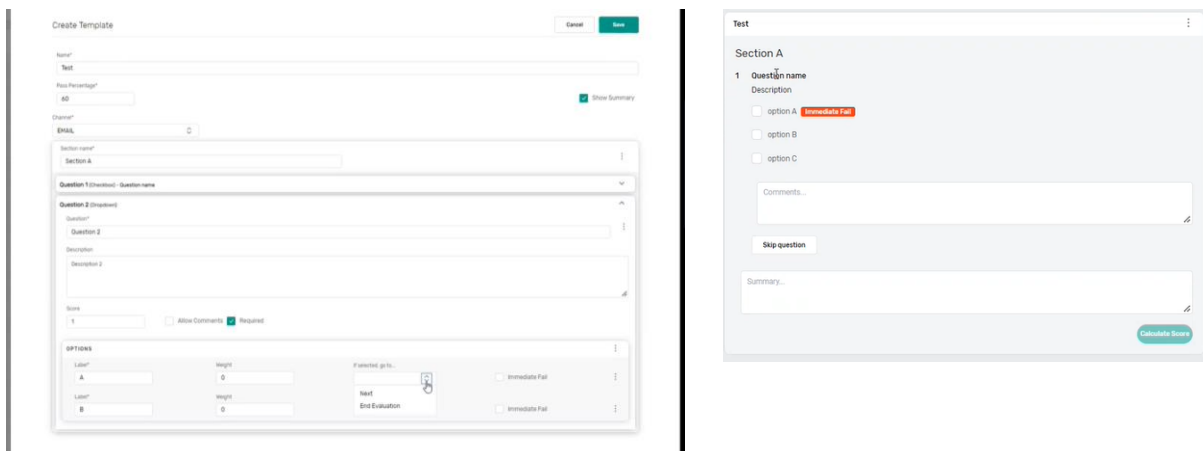
If you want to add another scoring option just select the three dots in the Options section and select the create new option and label it.

In each section you can select if the question is required or optional – If a question is not marked as Required you can specify whether to skip to the next question or to the end of the form.

The “allow comments” option will create a text field allowing people using the form to create notes or give specific coaching feedback with the form itself.

Question Types

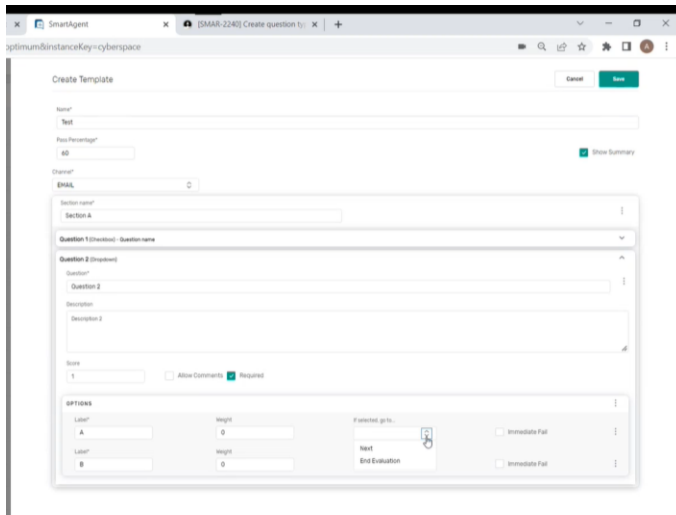
Checkbox – Creates a checkbox response for the evaluator and any “Immediate Fail” responses are highlighted in red



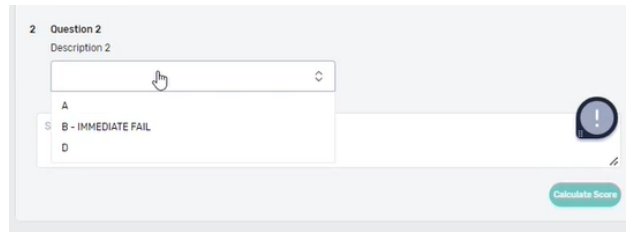
The left screenshot shows the 'Create Template' form for a checkbox question. It includes fields for Name, Pass Percentage, Channel, and Section name. The 'Question 1' section is expanded, showing the question text, description, and options. The 'Options' section is also expanded, showing the 'A' and 'B' options with their respective weights and 'Immediate Fail' status. The 'Required' checkbox is checked.

The right screenshot shows the 'Test' form for a checkbox question. It includes the 'Section A' header, the question name, description, and options. The 'option A' is highlighted in red, indicating an 'Immediate Fail' response. There are fields for 'Comments' and 'Summary', and a 'Calculate Score' button.

Dropdown – Creates a dropdown list of possible responses from the options listed in the form

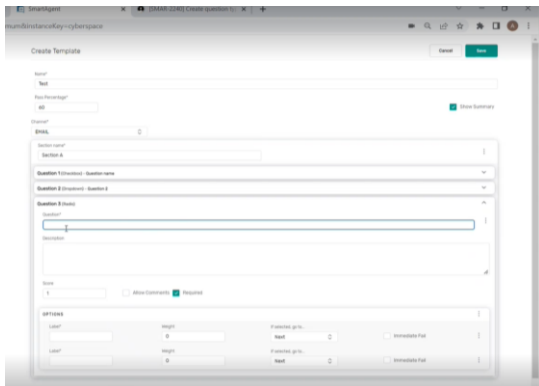


The 'Create Template' interface shows a form for creating a new question. Under 'Question 2 (Dropdown)', the 'Question' field is set to 'Question 2' and the 'Description' field is set to 'Description 2'. The 'Options' section shows two options: 'A' and 'B', both with a weight of 0. The 'If selected go to:' dropdown is set to 'Next', and the 'End Evaluation' checkbox is checked. The 'Immediate Fail' checkbox is also checked.

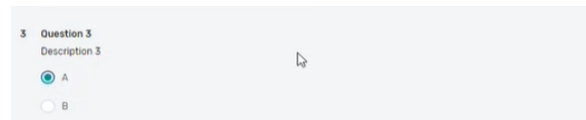


The 'Question 2' preview shows a dropdown menu with the following options: 'A', 'B - IMMEDIATE FAIL', and 'D'. A 'Calculate Score' button is visible at the bottom right.

Radio Buttons – Creates selectable button responses from the options listed in the form

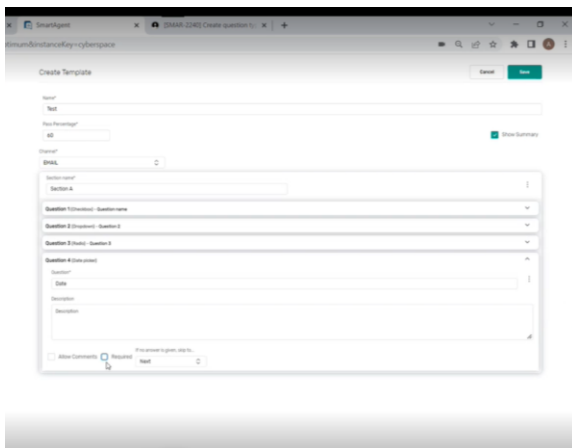


The 'Create Template' interface shows a form for creating a new question. Under 'Question 3 (Radio)', the 'Question' field is set to 'Question 3' and the 'Description' field is set to 'Description 3'. The 'Options' section shows two options: 'A' and 'B', both with a weight of 0. The 'If selected go to:' dropdown is set to 'Next', and the 'End Evaluation' checkbox is checked. The 'Immediate Fail' checkbox is also checked.

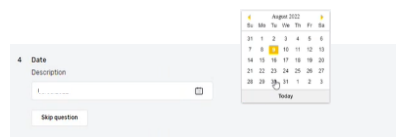


The 'Question 3' preview shows two radio button options: 'A' (selected) and 'B'.

Date Picker – Creates a date picking option on the form

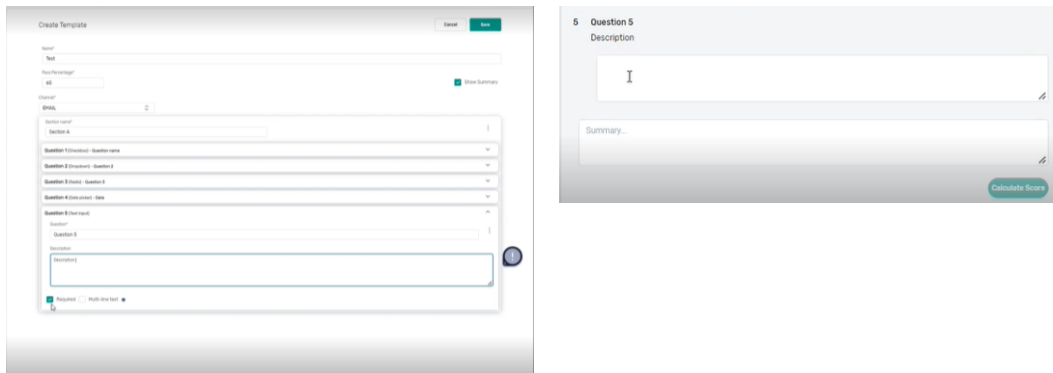


The 'Create Template' interface shows a form for creating a new question. Under 'Question 4 (Date picker)', the 'Question' field is set to 'Question 4' and the 'Description' field is set to 'Description 4'. The 'Options' section shows two options: 'A' and 'B', both with a weight of 0. The 'If selected go to:' dropdown is set to 'Next', and the 'End Evaluation' checkbox is checked. The 'Immediate Fail' checkbox is also checked.



The 'Date' preview shows a date picker with the date 'August 2022' selected. A 'Skip question' button is visible at the bottom.

Text Box – Creates a free format text box on the form



Scoring

In each question you can specify the number of points available (in the above example this is 10) You can then give a weighted score next to each option. So this could be 10 points for the correct answer 0 for an incorrect answer. Or if you have a more “judgement” score you could give 10 points for a great response, 5 for an average, 0 for a poor response etc.

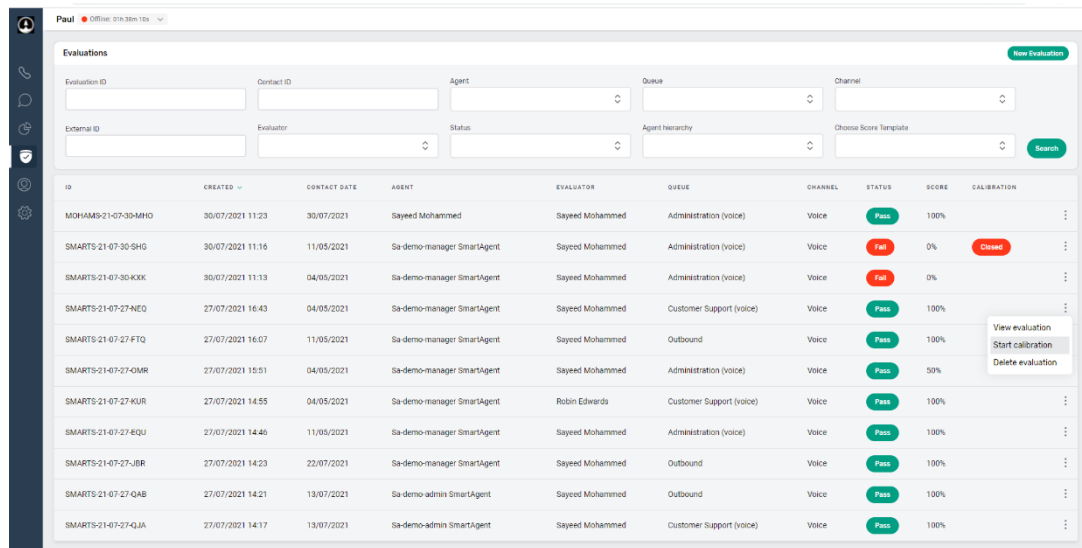
The overall score will be calculated when all required questions have been responded to and the “calculate score” button has been clicked.

The system will give an overall score in % based on the weighting of questions that have not been skipped. However any responses marked “immediate fail” will result in an overall fail rating , no matter the score.

Calibration Process

Under normal circumstances once a contact has been scored by an evaluator that is the final score given for the contact and it is tagged against the Contact trace record or CTR.

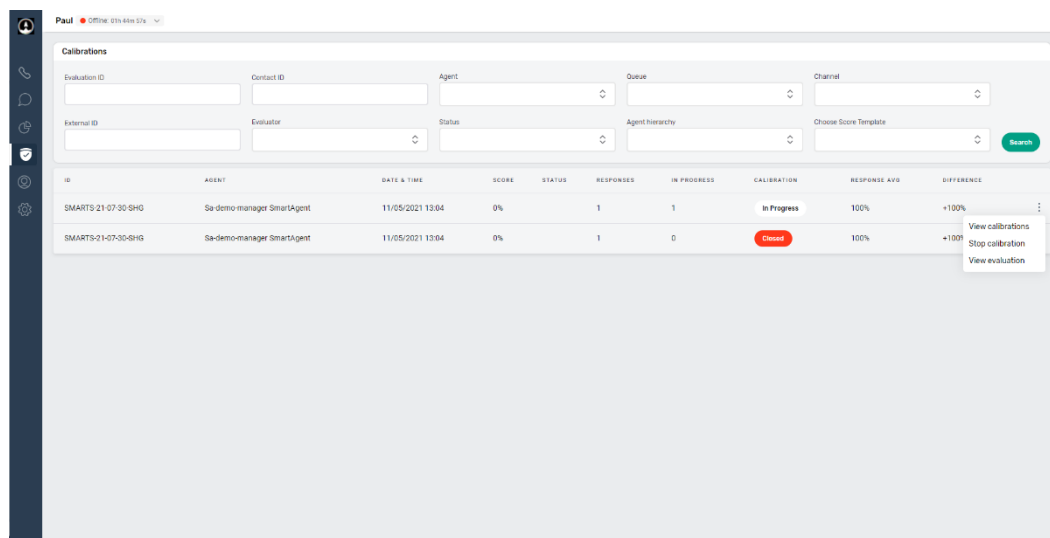
However some organisations require there to be an additional check done on the call evaluation process itself. This might be done by a specialist QA team rather than the supervisors who may want to evaluate and check that the QA form has been used correctly or for some other reason.



ID	CREATED	CONTACT DATE	AGENT	EVALUATOR	QUEUE	CHANNEL	STATUS	SCORE	CALIBRATION
MOHAMMS-21-07-30-MHO	30/07/2021 11:23	30/07/2021	Sayed Mohammed	Sayed Mohammed	Administration (voice)	Voice	Pass	100%	
SMARTS-21-07-30-SHG	30/07/2021 11:16	11/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Administration (voice)	Voice	Fail	0%	Closed
SMARTS-21-07-30-KKK	30/07/2021 11:13	04/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Administration (voice)	Voice	Fail	0%	
SMARTS-21-07-27-NEO	27/07/2021 16:43	04/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Customer Support (voice)	Voice	Pass	100%	
SMARTS-21-07-27-FTQ	27/07/2021 16:07	11/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Outbound	Voice	Pass	100%	
SMARTS-21-07-27-OMR	27/07/2021 15:51	04/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Administration (voice)	Voice	Pass	50%	
SMARTS-21-07-27-KUR	27/07/2021 14:55	04/05/2021	Sa-demo-manager SmartAgent	Robin Edwards	Customer Support (voice)	Voice	Pass	100%	
SMARTS-21-07-27-EQU	27/07/2021 14:46	11/05/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Administration (voice)	Voice	Pass	100%	
SMARTS-21-07-27-JBR	27/07/2021 14:23	22/07/2021	Sa-demo-manager SmartAgent	Sayed Mohammed	Outbound	Voice	Pass	100%	
SMARTS-21-07-27-QAB	27/07/2021 14:21	13/07/2021	Sa-demo-admin SmartAgent	Sayed Mohammed	Outbound	Voice	Pass	100%	
SMARTS-21-07-27-QJA	27/07/2021 14:17	13/07/2021	Sa-demo-admin SmartAgent	Sayed Mohammed	Customer Support (voice)	Voice	Pass	100%	

Once evaluated a contact evaluation score is locked in. However if you wanted to get others to calibrate a particular contact, someone with “Calibration” access permission would come to the overall Evaluation screen and select the contact and use the “start calibration” option using the three dots at the right hand side of the screen.

This would “unlock” the existing evaluation score and allow others to submit an additional evaluation of the contact which can be compared on the Calibration screen.



ID	AGENT	DATE & TIME	SCORE	STATUS	RESPONSES	IN PROGRESS	CALIBRATION	RESPONSE AVG	DIFFERENCE
SMARTS-21-07-30-SHG	Sa-demo-manager SmartAgent	11/05/2021 13:04	0%		1	1	In Progress	100%	+100%
SMARTS-21-07-30-SHG	Sa-demo-manager SmartAgent	11/05/2021 13:04	0%		1	0	Closed	100%	+100%

While the calibration is active it will show on the calibration screen as “in progress”.

Comparative scores can be viewed from the calibration screen, while the contact calibration is active. Once the contact has been evaluated by enough additional evaluators the calibration process can be stopped to restore it back to it's locked down status.

The scores from the different evaluators can be compared by selecting the “view calibration” option, which will provide a line by line comparison of the evaluator’s scoring of each section / question.



Sayed
Available 62m 39s

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ID	AGENT	DATE & TIME	SCORE	STATUS	RESPONSES	IN PROGRESS	CALIBRATION	RESPONSE AVG	DIFFERENCE
SMARTS-21-07-30-SHG	Sa-demo-manager SmartAgent	11/05/2021 13:04	0%		1	0	In Progress	100%	+100%

QUESTION

SAYEED MOHAMMED

DAVE MULQUEENEY

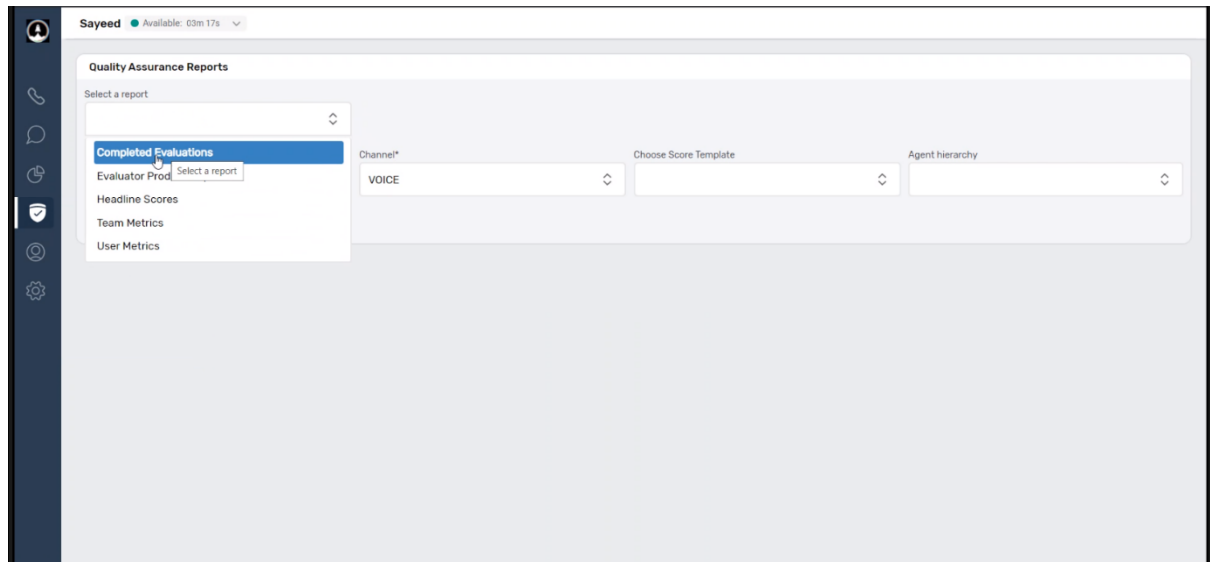
Pass 100%

Did agent greet the customer and establish a name to call the customer?	No Greeting (0)	Greeting done (1)
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QA Reports

The Quality Assurance reports offers a range of agreed, pre-configured reports that can be used to produce CSV format reports on the QA activities specified.

This can be filtered by particular channel, eg voice or chat, use of a particular score template or by a particular team or department selected from the Agent Hierarchy from within your setup.



Notes

