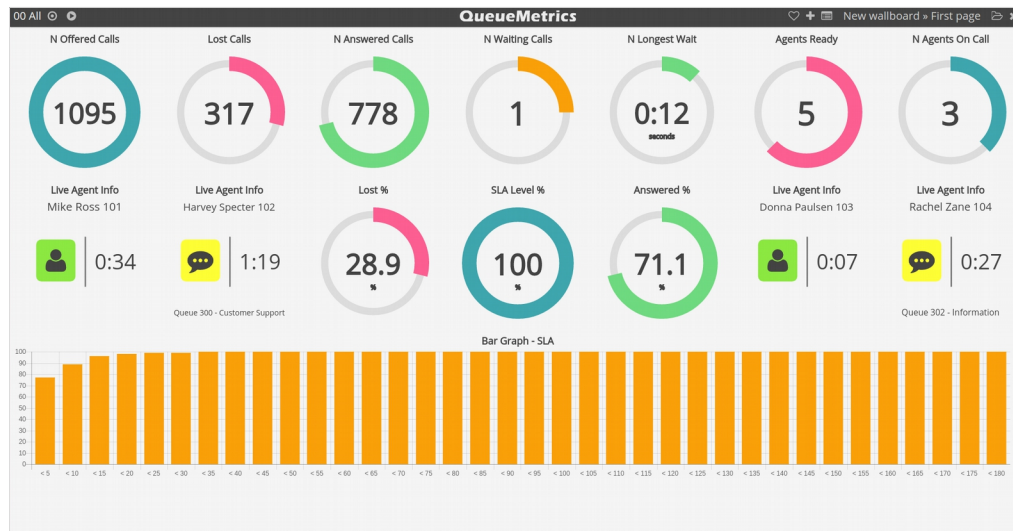


Quality Assessment with QueueMetrics



The QueueMetrics call center suite collects Asterisk PBX data and generates analytical reports for over 180 metrics, covering key categories of call center management: reporting, supervising, agent page and quality assessment. This is a hands-on tutorial that shows how to get started with the QueueMetrics Quality Assessment (QA) module.

The Quality Assessment module lets you:

- Define a set of metrics to be used for call grading
- Have the QA team grade calls while they're being processed or from historical recordings
- Run complete reports by queue and by agent.

The QA module in QueueMetrics was created so that a specific supervisor could track the performance of agents on a given set of metrics:

- Track call: find issues before they find you
- Track agents: improve training assess strengths and weaknesses
- Track queues: are we doing what we are expected to be doing? Can we show it?

If you are not using QA now, you are losing out to your competitors. The time has come to learn it!

General Ideas

In your contact-center each call is graded on a set of metrics you define yourself, because each call centre is different:

- Each metrics has its own Engagement Code, a short code that is used to display it
- They map to a numeric score (0-100)
- The same metric can be used in multiple forms.

Metrics are grouped into Forms:

- Up to 10 sections with up to 130 questions
- Metrics are grouped into four grade bands (Issue, Required Improvement, Meets expectations, Exceeds expectations)
- For each form, a single score is computed
- The same call can be graded on multiple forms
- Forms are immutable (more or less).

Form input is flexible:

- Questions can be hidden or shown based on previous ones
- Questions can be weighted in order to compute the total score
- Shortcut questions: if they fail, all form fails.

We believe in immediate agent feedback; an agent:

- Receives a task when a call they took is scored
- Agents are immediately engaged
- Agents must acknowledge or dispute the scoring.

Getting Started

The effective management of QA is a process in itself and requires some planning. Let's see together how to do it.

First define what you expect:





- Don't make things too complex at first
- Tell your agents about the expected performance -they should be aware of it
- Plan a call review process
- Don't oversample issues! You want a representative picture with "good" and "bad" calls.

Then define the initial QA review targets and plan in advance the corrective action to be taken:

- How do you plan to react to specific results?
- What forms of training are available?
- Do you have CBTS (computer based training)? Coaching sessions? Additional training material? They can be easily integrated into QueueMetrics.

A real-life example

Now we will present a basic and simple form to review possible issues.

Code	Description	Status	N/A	Value	
	Resolution				
QM1	Positive case resolution			<input type="radio"/> Yes <input checked="" type="radio"/> No	
SEX	The sex of the caller			-	
	Agent				
COU	How well did the rep display courtesy?	?			
QM2	Did the rep use a professional tone?	Meets exp.		70	

We use some non scoring questions:

- Track whether the problem is solved

- Track the sex of the caller.

If the problem is not solved:

- Track conversation metrics
- Track different data input.

With QueueMetrics QA you can see scoring and non-scoring questions as well as questions that are shown or hidden based on the results of previous questions.

Creating items

In order to create items, simply start by defining your questions:

QA: Items Editor

Engagement code:	QM1
Description:	Positive case resolution
Item weight:	0
Item is a shortcut:	No
Item is a section shortcut:	No
Item is mandatory:	Yes
Item value type:	Yes/No
Multi value options:	<div style="border: 1px solid #ccc; height: 60px; width: 100%;"></div>
	E.g. 40:ToImprove 80:Satisfying 100:Good
Created by:	demoadmin, 02/02/2016, 17:25
Last update:	

Then add:

- The unique engagement code (a short code to be displayed)
- A description

- The relative weight
- If the item is a shortcut: if it fails, the form fails. For example, using profanity is strongly forbidden and the call is marked as a failure.
- Value types:
 - Number
 - Yes/No
 - Combo (drop-downs with fixed choices).

Creating forms

Let's see now how to create a form.

QA : Forms Editor

Form name:	<input type="text" value="My Sample Form #2"/>
Security key for input:	<input type="text"/>
Security key for reports:	<input type="text"/>
Queue visibility:	<input type="text"/>
Form locked?	<input type="text" value="No"/>
N. calls graded:	6
Section names	
Section 1:	<input type="text" value="Resolution"/>
	(QM1, SEX)
Section 2:	<input type="text" value="Agent"/>
	(COU, QM2)

First, define:

- Security keys (who can use the form?)
- Allowed queues (where can the form be used - if blank, for any queue)
- Open / Locked (can new data be added?)

- The sections
- Thresholds for grading bands.

Then define which items are part of the form.

QA: Items for Form: My Sample Form #2

Add new item:

Section: Resolution		Active if...	Extra Score	Non Scoring
-	QM1: Positive case resolution	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
-	SEX: The sex of the caller	<input type="text"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Section: Agent				
-	ASS: Was assurance given for client's assistance?	QM1 < 10	<input type="checkbox"/>	<input type="checkbox"/>
-	QM2: Did the rep use a professional tone?	QM1 < 10	<input type="checkbox"/>	<input type="checkbox"/>

- Group items into sections
- Move up and down as needed
- Score contributions
- Visibility
- Decide if a question is non-scoring (i.e. not used to compute final score) - usually because there is some information you want to track but it does not depend on agent behaviour, e.g. the sex of the caller
- Decide visibility rules.

Please note that once a form has items in it, it cannot be changed anymore.

Anatomy of a form

What does a form look like?

Level	Range	Items
Issue	0 - 25	0
Req. Impr.	26 - 50	0
Meets exp.	51 - 75	1
Exceeds exp.	76 - 100	0

Overall Performance		
Resolution	0	0.0
Agent	70	35.0
Total score:	70/200	
Avg.	35	

Input form	
Form::	My Sample Form #2
Status	-
Call details	
Start time:	February 03 2016, 08:42
Queue:	Sample Queue 300
Agent:	John Doe (101)
Agent Group:	-
Caller:	+1-1454485360
AstClid:	1454485360.7563
Audio recordings	
- call-1454485360.7563.mp3	

Close

Note!

Print

Timer
0:00

Code	Description	Status	N/A	Value
	Resolution			
QM1	Positive case resolution			<input type="radio"/> Yes <input checked="" type="radio"/> No
SEX	The sex of the caller			-
	Agent			
COU	How well did the rep display courtesy?	?		
QM2	Did the rep use a professional tone?	Meets exp.		70

Save

Each QueueMetrics QA form includes:

- A form selector
- Call details recap - date, time, caller etc.
- Recordings (if available)

- A timer
- Items divided by type
- Overview per section
- The final score
- Questions and notes on questions:
 - Free text: general notes on the call
 - Notes per specific question
- An audio player with speed, playback controls and markers (spot interesting points and add points of interest for later review).

Total score:	0/0
Avg.	0

AstClid:	1454485360.7563
----------	-----------------

Audio recordings (1 markers available)

- call-1454485360.7563.mp3

Timer
0:00

Add

User, Date	Form, Question	Notes
2016-02-03 08:52:47.0 demoadmin		This is a note

Delete All

Markers

+

call-1454485360.7563.mp3
1x

▶
◀
⏸
⏹
⏮
⏭

00:00 / 00:00

1x

3x

Time	Duration	Notes
▶	0:13	- Look here!

8

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Entering QA data

When your form is ready and defined, entering the QA feature from your QueueMetrics home page is really a simple operation.

Follow this easy sequence:

Run Report → Queue details → Call Detail → QA

The screenshot displays the QueueMetrics interface. On the left, a table titled 'Queue details' shows a list of calls with columns for Date, Caller, Queue, IVR, and Wait. On the right, a 'Call Detail' popup window is open, showing a form for entering QA data for a specific call. The popup window has a title bar with 'Call Detail' and a URL '10.10.5.27:8080/queuemetrics/qm/popup_call.jsp'. Below the title bar, there are tabs for 'Call detail', 'Stints: 1', 'Markers', 'Call events: 0', and 'QA'. The 'QA' tab is selected, and the form contains the following fields:

Field	Value
Asterisk Call ID:	1447766357.1346
Date and time:	11/17 - 14:19:17
Queue:	Support [300] [300]
Caller ID:	201
Handled by:	John Doe (101)
Duration:	9 sec.
Time in IVR before queueing:	0 sec.
Waiting time:	3 sec.
Original position	# 1
Disconnection cause:	Agent disconnected
Transferred to:	

Form appears → Listen to the call → Fill the form




That's all. Easy, isn't it?


Results

In QueueMetrics, results of QA can be displayed with different criteria.

Quality Assessment: Report data


Tracked calls per agent

Agent	N.Calls	Avg	Exc.	Meet	Impr.	Issue	
John Doe (101)	3	54		3	1	0	0
Mike Boo (102)	2	40		1	1	0	0
sip/200	1	80		1	1	0	0

▶ Export as... 


Tracked calls per queue

Queue	N.Calls	Avg	Exc.	Meet	Impr.	Issue	
Sample Queue 300	6	54		5	3	0	0


▶ Export as... 

Tracked calls per agent group

Agent groups	N.Calls	Avg	Exc.	Meet	Impr.	Issue	
-	6	54		5	3	0	0

▶ Export as... 

Analysts tracking calls

Analyst	N.Calls	Avg	
demoadmin	6	54	

Results are grouped:

- Per agent
- Per queue
- Per group
- Per analyst.

Showing:

- Averages

- Items by threshold.

Grouped by section.

Section: Resolution

Agent	N.Calls	QM1	SEX	Avg
John Doe (101)	3	33	13	0
Mike Boo (102)	2	50	15	0
sip/200	1	0	20	0

Export as...

Queue	N.Calls	QM1	SEX	Avg
Sample Queue 300	6	33	15	0

Export as...

Section: Agent

Agent	N.Calls	COU	QM2	Avg
John Doe (101)	3	88	73	80
Mike Boo (102)	2	70	90	80
sip/200	1	90	70	80

Export as...

Queue	N.Calls	COU	QM2	Avg
Sample Queue 300	6	84	77	80

Export as...

Or by agent, calls, average per question or queue.

If you want to see how a result came to be, below you can see an example of all the graded calls that contributed to a result.

Quality Assessment: Detail for: agent/101

Export as...

Date	Queue	Caller	Analyst	Date	Score	Avg.	Exc.	Meet	Impr.	Issue
02/03 - 08:42:25	Sample Queue 300	+1-1454485330	demoadmin	02/03 - 08:56:43	0	0	0	0	0	0
02/03 - 08:42:55	Sample Queue 300	+1-1454485360	demoadmin	02/03 - 08:54:02	165	83	1	1	0	0
02/03 - 08:55:30	Sample Queue 300	+1-1454486115	demoadmin	02/03 - 08:56:22	156	78	2	0	0	0

Export as...

Click on a call to see its QA form (questions, notes, associated audio files) with an overview of results.

Quality Assessment: Form summary

Overall Form Summary

Form ID	Form Name	N Calls	Avg score
8	My Sample Form #2	6	53.50

Export as...

Scoring questions

Item code	Question	N Calls	Avg score	Exc. (*)	Meet (*)	Impr. (*)	Issue (*)	Shortcuts (*)
	Resolution	6	0.00	0.0%	0.0%	0.0%	0.0%	0.0%
	Agent	6	80.12	62.5%	37.5%	0.0%	0.0%	0.0%
COU	How well did the rep display courtesy?	4	83.75	75.0%	25.0%	0.0%	0.0%	0.0%
QM2	Did the rep use a professional tone?	4	76.50	50.0%	50.0%	0.0%	0.0%	0.0%

Export as...

(*) Values counted with current Item weights

Non scoring questions

Item code	Question	N Calls	Avg score	Values
	Resolution	6		
QM1	Positive case resolution	6	33.33	4: No
				2: Yes
SEX	The sex of the caller	6	15.00	3: Female
				3: Male
	Agent	6		

Export as...

You will get the overall summary chart, the scoring questions, the number of forms scored, percentages per threshold or shortcuts and non scoring histograms.

Grading calls

Now we will see the most effective way to choose calls to grade.

Quality Assessment: Grading page

Form:

Queue:

Agent:

Agent Group:

Location:

Outcome:

Time period:

Call start date: , :

Call end date: , :

Today | Yesterday | The day before yesterday
Last day | Last 7 days | Last 30 days | Last 90 days

Call outcomes

	Min %	Min #
Sales	<input type="text"/>	<input type="text"/>
QCont.	<input type="text"/>	<input type="text"/>
Contacts	<input type="text"/>	<input type="text"/>
-	<input type="text"/>	<input type="text"/>

Agent groups

Default	<input type="text"/>	<input type="text"/>
<i>All Calls</i>	<input type="text"/>	<input type="text"/>
<i>Individual agents</i>	<input type="text"/>	<input type="text"/>

When analysts do this manually, they will often end up choosing a biased set of calls:

- Issues: "interesting" calls
- Short or long calls
- First or last calls of set.

The best solution is to create a specific and well defined policy; for example:

- By call outcome - e.g. all calls marked as sale
- By agent group - e.g. new hires get a percentage of their calls answered.

Then use the Grader's page and its weighted random sampling feature in order to find efficient sets of calls to be graded.

Quality Assessment: Grading search form

Report Details:	
Form:	My Sample Form #2 (2)
Atomic queue(s) considered:	* [*]
Period start date:	January 27 2016, 08:00
Period end date:	February 03 2016, 18:00

Send CBT
Send Coaching

Send CBT

 CBT:

 CBT URL:

 Note for agent:

 Reason:
OK

Suggested calls

Time	Queue	Caller	Agent	Wait	Talk	Outcome	Audio	Forms	Cmpl	
02/03 - 08:42:10	Sample Queue 300	+1-1454485330	John Doe (101)	0:05	0:10		1	My Sample Form #2	[x]	<input type="checkbox"/>
02/03 - 08:42:18	Sample Queue 300	+1-1454485338	Mike Boo (102)	0:05	0:10		1	My Sample Form #2	[x]	<input type="checkbox"/>
02/03 - 08:42:35	Sample Queue 300	+1-1454485355	agent/103	0:05	0:10		1		[x]	<input type="checkbox"/>
02/03 - 08:42:40	Sample Queue 300	+1-1454485360	John Doe (101)	0:05	0:10		1	My Sample Form #2	[x]	<input type="checkbox"/>
02/03 - 08:55:15	Sample Queue 300	+1-1454486115	John Doe (101)	0:05	0:10		1	My Sample Form #2	[x]	<input type="checkbox"/>
02/03 - 08:55:19	Sample Queue 300	+1-1454486119	Mike Boo (102)	0:05	0:10		1	My Sample Form #2	[x]	<input type="checkbox"/>

Export as...

Run again
Change search criteria

Target statistics

	Found	%	% needed	#	# needed	# remaining
Call outcome Sales	0					
Call outcome QCont.	0					
Call outcome Contacts	0					
Call outcome -	6					
Agent Group Default	0		30.0 %			
All calls	6		30.0 %			1
Agent John Doe (101)	3					
Agent Mike Boo (102)	2					
Agent agent/103	1					

The Grading page

From this page you can generate random samplings in call space or select preferred calls matching multiple criteria. Multiple Quality Analysts can also work on the same issue at once if

needed, by being aware of which calls other analysts graded. You can set target criteria and build a first effective line of defense against quality issues.

The Training And Coaching Page

This page is the main access point for sending CBTs and Meeting (also named Coaching) tasks to an agent or a set of agents. It's based on a three-step wizard where the list of users are defined in the first two steps and the proper CBT or Meeting tasks are sent in the third step.

Agents selection starts by several search criteria.

Looking at the list of agents, a single agent can be selected by clicking on their related checkbox, while all agents in the list can be selected by clicking on the checkbox placed on the header of the list.

Performance tracking

Long-term agent performance management is a must for modern call centers. Agents need to be managed in order to work effectively.

You need to track:



- Performance targets
- Quality policies
- Agents that needs training
- The agent lifecycle (untrained → just trained → fully trained)

We suggest the following routine for best management:

- Training - the agent takes courses, CBTs, etc.
- Validation period - the agent starts working
- Review - is the agent behaving according to policies?
- Production
- Periodic Review - is the agent still behaving correctly?

With the help of our performance tracking system, you can set up different criteria:

- Comprehensive Performance Rules:
 - Performance
 - Sales, SPH
 - Contacts
 - Call duration
 - Averages
 - Anomalies
 - Quality results

Target	Enabled		Yellow	Score	Red	Score
SPH (Avg.)	Yes ▾		>3	100	>10	500
QCPH (Avg.)	No ▾					
CPH (Avg.)	Yes ▾		>10	50	>30	100
Sales (Avg.)	No ▾					
QC (Avg.)	No ▾					
Cont (Avg.)	No ▾					
N Calls (Avg.)	No ▾					
Call length (Avg.)	No ▾					
Forms (Avg.)	No ▾					
AVG Score (Avg.)	No ▾					
Flunked (Avg.)	No ▾					
Call length	Yes ▾		10<<50	600	>=50	300
AVG Score	No ▾					

Red and yellow alarms with relative importance scores can be also added to your reports.

Finally the Performance tracker lets you:

- Apply Performance rules and find anomalies
- Send training and coaching

- Move agents between groups
- Be reminded for further review

Home Perf. Track Ag. Scoring **Ag. Detail**

Performance Tracking: Agent detail for agent/200

Queues:	00 All
From date:	January 30 2010, 08:00
To date:	February 06 2016, 18:00
Scoring rules:	Demo Performance Tracker Ruleset
QA Form:	Quality Assurance

Move to group **Send CBT** **Send Coaching**

Move to group

New group:

Remind me in days

Reason:

Total calls found: 1 - Visible calls: 1

Call length <=

Form avg. score >

-

Score	Date	Queue	Caller	Duration	Sales	QC	Cont	AVG Score	Flunked	Call outcome	Form
0	10/31 - 16:50:21	Support [300]	201	0:06				0.0			<input type="button" value="edit"/> <input type="checkbox"/>

Final note and References

For more information about the QA and QueueMetrics reports read the rich QueueMetrics documentation [in Chapter 13](#) of the [User Manual](#).

Visit www.queuemetrics.com for a 30 days full featured trial.