

Genii Analytics | Weighted AQA and QA Logic

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Contents

Purpose	2
Critical Failures	5
Historical Data	6
Terminology	7
Answers	8
N/A Answers	8
Calculations	9
Weighted AQA Reporting	10
QA Reporting	12
Icons Definitions	13

Revision	Date	Name	Description
1.0	2021/05/01	L Petersen	Initial doc.

Purpose

This document is to provide detail on how the calculations and logic is set up for both these products.

Please note both product calculations will default to Controllable failures unless you have made other selections.

This means, Uncontrollable failures on default reports will not affect weighting.

As these are Weighted products, I would recommend setting the Assessment and Pass Target to allow the reporting to have the most impact.

You will find this input on the Edit Campaign page.

Assessment Target	<input type="text" value="80.00"/>
Pass Target	<input type="text" value="90.00"/>

Figure 1: Targets

What is the difference:

Assessment Target – The weight (score) that needs to be achieved to pass a single assessment. Generally, the sum of the weights allocated.
Assessment Scope. Please note this is only for weighted products.
Standard AQA is hard set to 100%.

Pass Target – The Percentage (%) of Assessments that have achieved the Assessment Target.
This will affect Standard AQA visualization as well.
Campaign Scope.

It is important to note the differences between these products:

1. QA is what most call centres are familiar with.
Its limitation is that it targets only the agent and so provides a one-sided story of your centre's issues.
On the app we do limit you to a 2-tier structure.
2. Weighted AQA allows you to view your centres' issues holistically while still being able to score your agents with a familiar method.
It allows you to tackle both business and agent failures at a root cause level.

Critical Failures

Critical Failures are set on the output metric (level 2) questions.

They can be added to weighted and zero weighted questions.

There are 3 types of failures that can be applied.

1. Section – This will reduce the applicable section score to zero.
2. Assessment – This will reduce the assessment score to zero.
3. Section and Assessment – this will reduce the applicable section score to zero and the assessment score to zero.

Although the last failure may seem strange, this is done so that you can view different aspects of the business on different reports.

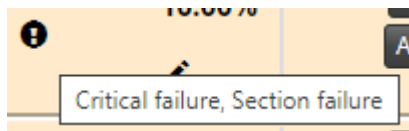


Figure 2: Section Critical Failure

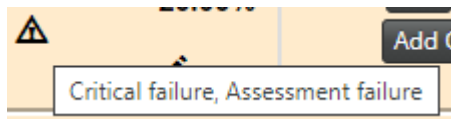


Figure 3: Assessment Critical Failure

Where both are side by side it indicates a Section and Assessment Failure



Figure 4: Assessment & Section Critical Failure

Historical Data

It should be noted that weights can be updated/amended, by adding questions to the scorecards, or redistributing weights across questions.

Adjusted weights WILL NOT change historical data.

All historical data will retain the weights and scores allocated at the time of capture.

Critical Failure changes WILL affect historical data.

If a critical failure type is added or removed from any question this will result in all historical data changing accordingly.

Terminology

Weight – this is the point value that is assigned to a question.

Applicable weight – sum of the weights of applicable questions answers (where the questions are not answered N/A). The Denominator

Applied weight – sum of the weights of the answered questions that passed. The Numerator

Single Assessment Calculation

Output Metric / Section	Weight	Results	Applied Weight #	Applicable Weight \$	Score
Issue Resolution	5	Uncontrollable Failure	5	5	100%
Ease of Understanding	5	N/A	0	0	--
Knowledge & Credibility	5	Controllable Failure	0	5	0%
Empathy	5	Controllable Failure	0	5	0%
Friendly & Courteous	5	Pass	5	5	100%
Resolution & Satisfaction	25		10	20	50.0%
Handled Interaction Efficiently	7.5	Pass	7.5	7.5	100%
Repeat Occurred	7.5	Pass	7.5	7.5	100%
Business Rule Failure	7.5	Pass	7.5	7.5	100%
System Update Failure	7.5	Pass	7.5	7.5	100%
Business Efficiency	30		30	30	100.0%
Protected Customer Privacy	10	Pass	10	10	100%
Regulatory SOP Adherence	20	Pass	20	20	100%
Regulatory Violation	10	Pass	10	10	100%
Regulatory Compliance	40		40	40	100.0%
Voice of the Customer	5	Pass	5	5	
Expression of Dissatisfaction	5		5	5	100.0%
Assessment Total	100		85	95	89.5%

Table 1: Single Assessment Calculation

Score = The Numerator (#) / The Denominator (\$)

Assessment Score = 85/95 = 89.5 %

Resolution and Satisfaction Section score = 10/20 = 50%

Answers

Although the greater than sign '>' is used as the indicator in both AQA and QA, it produces different results.

In AQA the > sign indicates a failure.

In QA the > sign indicates a pass.

You have the option of using binary answers, namely Yes or No, as well as Multiple answers like NPS score, namely Promoter, Neutral and Detractor or 0 – 10 scores.

N/A Answers

If you elect to use N/A as answer option, you will have to note the following.

N/A counts as neither a pass nor fail unless it is allocated a greater than sign.

In calculations N/A (without a greater than sign) will act as follows

1. Reduce the denominator score by the question's associated weight.

Scenario:

If you have 10 questions with 10% weight each and you pass 9 and 1 is N/A your total weight is 90% but your score is 100%

We measure the capture form as a score card with a total of 100, we see this as a score.

If the assessor gives an assessment a N/A answer with the clauses specified above. The score total will become 90.

Thus, the calculation will look like as follows $[\text{Applied weight}]/[\text{Applicable weight}] * 100$.

This calculation will be represented as follows $90/90*100 = 100\%$

Where the first 90 is the score and the second 90 is the total thus the assessments will still score 100%.

N/A can be a pass for QA (if > is added) but can never be a failure as the code excludes it.

Calculations

Multiple assessments

Output Metric/Section	Critical Failures	Weights	Call 1	Call 2	Call 3	Call 4	Call 5	Call 6	Call 7	Overall Score
Issue Resolution		5	✗	✓	✓	⊖	✓	✓	✓	80%
Ease of Understanding		5	✓	⊖	⊖	⊖	✓	✓	✗	75%
Knowledge & Credibility		5	✓	✗	⊖	⊖	✓	✓	✓	80%
Empathy		5	✓	✗	⊖	⊖	✓	✓	✓	80%
Friendly & Courteous		5	✓	✓	⊖	⊖	✓	✓	✓	100%
Resolution & Satisfaction		25	80%	50%			100%	100%	80%	82.0%
Handled Interaction Efficiently		7.5	✓	✓	✗	⊖	✓	✓	✗	67%
Repeat Occurred		7.5	✓	✓	✓	⊖	✓	✓	✓	100%
Business Rule Failure		7.5	✓	✓	✓	⊖	✓	✓	✓	100%
System Update Failure		7.5	✓	✓	✓	⊖	✓	✓	✓	100%
Business Efficiency		30	100%	100%	75%		100%	100%	75%	91.7%
Protected Customer Privacy	Section	10	⊖	✓	✗	⊖	✓	✗	✓	60%
Regulatory SOP Adherence	Section & Assessment	20	⊖	✓	✓	⊖	✓	✗	✗	60%
Regulatory Violation	Section	10	⊖	✓	✗	⊖	✓	✗	✓	60%
Regulatory Compliance		40		100%	0%		100%	0%	0%	40.0%
Expression of Dissatisfaction		5	✓	✓	✓	⊖	✓	✗	✓	83%
Voice of the Customer		5	100%	100%	100%		100%	0%	100%	83.3%
Average Score		100	91.7%	89.5%	36.7%		100.0%	0.0%	0.0%	53.0%

Table 2: Multiple Assessments Calculations

Legend	
✓	Pass
✗	Controllable Failure
⊖	N/A

These calculations and rules apply to both products.

The table above provides examples of how the assessment calculations are done.

It includes section and output metric scores, as well as average and overall scores.

It also includes critical failures questions and how they affect scoring.

See additional scenarios mentioned highlighted in N/A answers, call 4 has only N/A answers. This call will only be included in the total assessments and will not form part of any calculations.

The same logic will apply where all answers for a section are N/A.

That section score for that assessment will show as '--' and will not be included in the total assessment denominator.

Example:

Protected Customer Privacy (Output Overall Score) =

	Call 1	Call 2	Call 3	Call 4	Call 5	Call 6	Call 7	Scores
Applied Weight #	--	10	0	--	10	0	10	30
Applicable Weight \$	--	10	10	--	10	10	10	50
Output Metric Score		100%	0%		100%	0%	100%	60%

Table 3: Protected Customer Privacy Calculation

Regulatory Compliance (Section Overall Score) =

	Call 1	Call 2	Call 3	Call 4	Call 5	Call 6	Call 7	Scores
Applied Weight #	--	40	0	--	40	0	0	80
Applicable Weight \$	--	40	40	--	40	40	40	200
Section Score		100%	0%		100%	0%	0%	40%

Table 4: Regulatory Compliance Calculation

Note: Critical Failure is applied to the section.

Average Score =

Sum of applied weights # / Sum of applicable weights \$

Therefore, as shown in Table 2.

Call 1

Sum of applied weights = 55

Sum of applicable weights = 60

Call 1 Average Score = 55/60 = 91.7%

Weighted AQA Reporting

Currently only the interactive reports will display weighted AQA logic.

PDF Reporting and Export csv are only AQA logic until further notice.

There are reports that will not be affected by the weighted AQA logic.

The table below indicates which reports will have both and which will only have AQA Logic.

Note: Default stream – Controllable

Reports	AQA Logic	Weighted AQA Logic
Dashboard	x	x
Performance Metric Drilldown	x	
Trending	x	x
Performance Metric Results	x	x
Gauge Performance Metric Results	x	
Calibration Assessor Summary	x	
Contact Disposition Matrix	x	
Root Cause Analysis	x	
Lift Opportunities	x	
Performance Tracker	x	x

Table 5:AQA Reporting

On each of these reports you will now find another filter option – Reporting Logic.

By default, these reports will display Weighted AQA logic, but will also allow you to view the same data with standard AQA logic applied.

You will also be able to view the result with or without the critical failures.

For Performance Metric and Trending Output metric results, Critical Failures are not implemented. This is viewing these scores from a business perspective and target centre improvement areas.

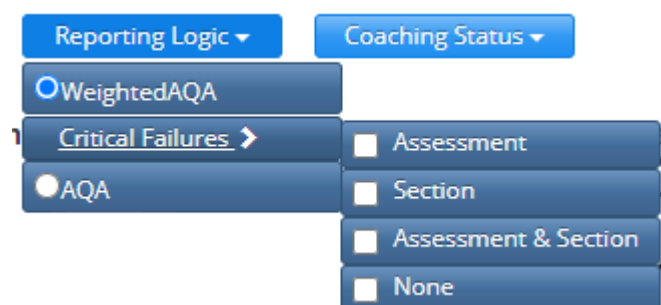


Figure 5:Filter Options

QA Reporting

QA reporting is available on PDF reporting, Interactive Reporting and Exporting.

Export csv will remain as normal as this is a straight data extract.

QA is limited to the following reports.

Note: Default stream – Controllable

Interactive	PDF Reporting	Export
Dashboard	Agent Detail PDF Report	List of Assessments with Additional Commentary
Performance Metric Results	Performance Tracker	List of Assessments with Output Metrics
Performance Tracker	Call Assessment Distribution PDF Report	List of Assessments with Root Causes
Contact Disposition Matrix	Coaching Feedback Distribution PDF Report	List of Assessments with Coaching Feedback Comments
Gauge Performance Metric Results		List of Assessments with Audit Details
Calibration Assessor Summary		Daily User Activity

Table 6:QA Reporting

Icons Definitions

Icons viewable on Question Wizard



Non-controllable, Upstream



Agent Controllable, Downstream



Auto Calculated Weight based on the sum of children questions.



Section Weighting is equally divided among the number of children questions.



Weighting can be edited and will influence the weighting of the section.



Weighting calculated from parent questions and sibling questions.



Additional Insights (Weighted AQA only)



Critical Failure, Assessment Failure



Critical Failure, Section Failure

Table 7:Icon Descriptions