

# Genii Analytics | Dynamic Filters | User Guide

V4. 21 Jul-20

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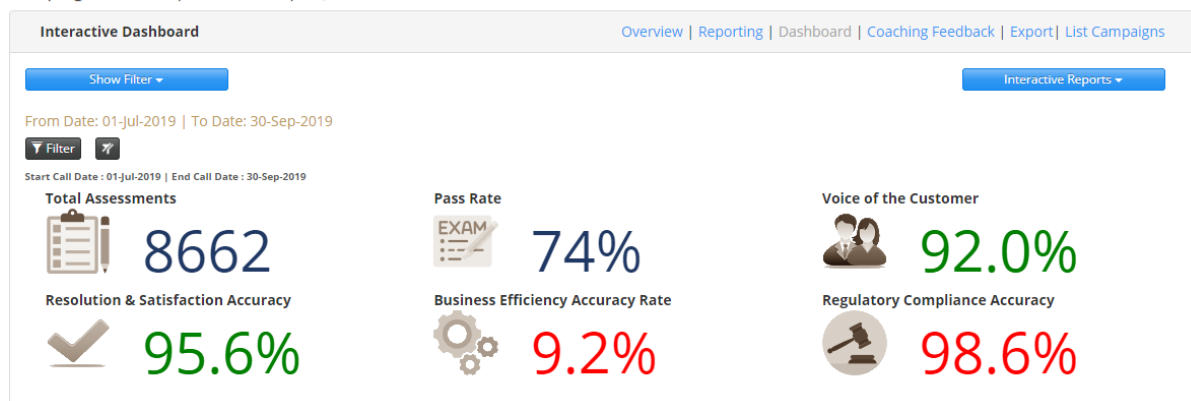
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## Dynamic Filter | Interactive Reports | Dashboard

The current/previous dashboard has a default setting as follows:

1. All section data is displayed with both upstream (business) and downstream (agent) attributes affecting the score.
2. Only the top 4 selections will be displayed. Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer.
3. Pass Rate is however calculated on only downstream (agent controllable) failures.
4. Total Assessments will include all successful assessments (passed and failed), however will not include assessments where N/A was selected for all sections.

Campaign Finance | Collections | Agent



Currently you can filter as follows:

1. Call Date
2. Agent
3. Team Leader
4. Manager

**Selection & Filtering Criteria**

Date Range

Select the call date range:

01-Jul-2019 to 30-Sep-2019

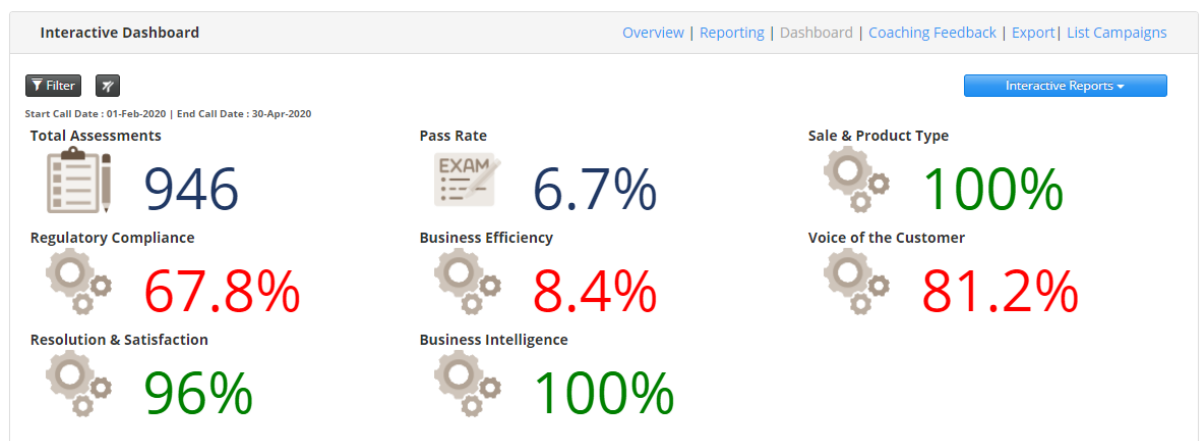
Agents Team Leaders Managers

Select one Or more Agents

- Abednigo Mphuthi
- Adele Lasling
- Adeline Mafoko
- Agnes Mocumi
- Agripa Phama
- Alice Tokeng
- Alina Khokho
- Alphina Ramalo
- Angeline Makato

The New Dynamic filter will default as follows:

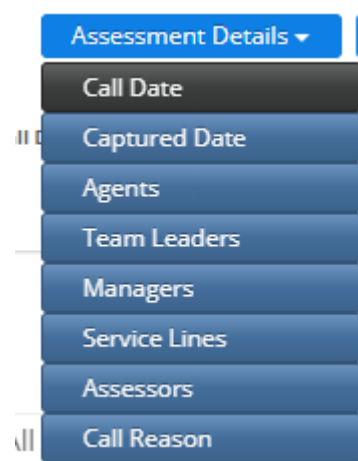
1. All section data will default to both downstream (agent) controllable and upstream (business) non controllable failures.
2. All section data (excluding BI allocated sections) will display (not only the top 4). It will display in the order that it appears on your campaign form.
3. Pass Rate will now include both downstream and upstream failures.
4. Total Assessments will include all successful assessments (passed and failed), including assessments where N/A was selected for all sections.
5. Calls where all the sections were allocated with an N/A will only be included in the Total Assessments and will not be included in the denominator of the Pass Rate or Section Scores.



You will now be able to filter as follows (depending on your campaign setting)

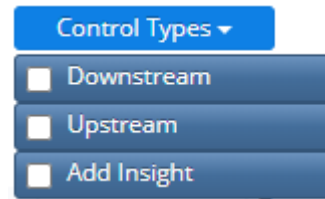
**Assessment details:**

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason



### Control Types:

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

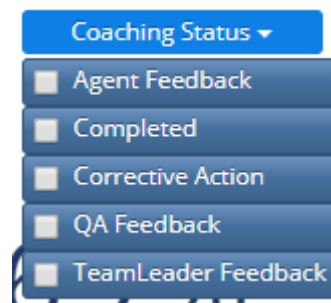


### Coaching Status:

(this will depend on your site)

The example below shows

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback



### Please note:

1. The filter will populate according to captured data except for the call date which will default to your campaign start and end date.  
ie: this means if you have no successful captures for a specific agent, that agent will not be part of the filter.
2. Only the date filter will affect the other filters.  
ie: This means if you select a date range that excludes a specific agent, that agent will not be on your filter list. However, if you select a specific Team Leader, all agents will still display.
3. Scores are based on the Control type selected on level 3 (furthest child will no longer be a factor). If question level 3 does not a control type or has a BI control type, it will not be included in the calculation.
4. Sentiment for Section Scores  
Negative = Failures/Assessment  
Positive = 1 - (Failures/Assessments)
5. The Dashboard will not work without section targets\*

## Dynamic Filter | Interactive Reports | Performance Tracker

The Performance Tracker has a default setting as follows:

1. All section data is displayed downstream (agent) attributes affecting the score.
2. Pass Rate is however calculated on only downstream (agent controllable) failures.
3. Only the top 4 selections will be displayed. Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer.
4. Total Assessments will include all successful assessments (passed and failed), however will not include assessments were N/A was selected for all sections.
5. The data is displayed in tables according to Service Level, Agent & Team Leader

Service Lines									
Service Line	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Client Care	735	350	52.4 %	89.8 %	56.9 %	94.1 %	95.5 %	3	3
Total	735	350	52.4 %	89.8 %	56.9 %	94.1 %	95.5 %	3	3

Team Leaders									
Team Leader	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Cherese Leafie	148	71	52.0 %	91.2 %	57.4 %	93.2 %	95.3 %	0	0
Kushen Govender	100	44	56.0 %	95.0 %	58.0 %	95.0 %	97.0 %	0	1
Thrishan Pathar	136	66	51.5 %	89.7 %	54.4 %	95.6 %	94.9 %	0	0
Vimal Roopchund	203	112	44.8 %	85.7 %	51.2 %	93.6 %	94.1 %	0	0
Bradley Carradus	148	57	61.5 %	90.5 %	65.5 %	93.9 %	97.3 %	3	2
Total	735	350	52.4 %	89.8 %	56.9 %	94.1 %	95.5 %	3	3

Agents									
Agent ID	Total Assessments	Total Criteria not met	Pass Rate	Pass % Resolution & Satisfaction	Pass % Business Efficiency	Pass % Regulatory Compliance	Pass % Voice of the Customer	Completed Coaching	Coaching in Progress
Bella Masekela	20	11	45.0 %	75.0 %	55.0 %	95.0 %	95.0 %	0	0

Currently you can filter as follows:

1. Call Date
2. Agent
3. Team Leader
4. Manager (where applicable)

### Selection & Filtering Criteria

Date Range

01-Jul-2019
to
31-Oct-2019

Select the call date range:

01-Jul-2019
to
31-Oct-2019

Filter For a Service Line:

Client Care
Retentions

Agents
Team Leaders

Select one Or more Agents

Adele De Vries
Adrian Kruger
Alishia Govender
Aljeraue Appel
Amori Lemley
Andi Louw
Andre Potgieter
Anlyn Seafeld
Anri Louw

The New Dynamic filter will default as follows:

1. All section data and Pass Rate will default to downstream (agent) controllable.
2. Add Insights (BI) and or upstream (business) non controllable failures can be added using the Control Type filter.
3. Section data will display in the order that it appears on your campaign form, up to 4 sections.
4. If you want to see the hidden section scores you can select them using the sections filter. Your pass rate will change according to the sections you have selected.
5. If you select more than 4 sections only the sections displayed will affect pass rate.
6. Total Assessments will include all successful assessments (passed and failed), including assessments where N/A was selected for all sections.
7. Any answers on disabled/hidden questions will no longer be included in the calculations
8. The tables will now include Manager where applicable.

You will now be able to filter as follows (depending on your campaign setting)

**Assessment details:**

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

A screenshot of a web interface showing a dropdown menu titled 'Assessment Details'. The menu is open, displaying a list of filterable fields: Call Date, Captured Date, Agents, Team Leaders, Managers, Service Lines, Assessors, and Call Reason. Each item is represented by a blue button with white text.

**Control Types:**

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

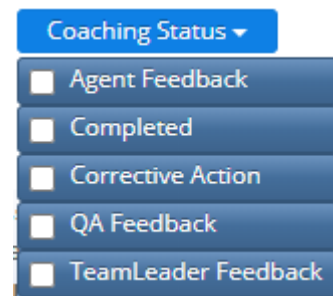
A screenshot of a web interface showing a dropdown menu titled 'Control Types'. The menu is open, displaying three filterable options: Downstream, Upstream, and Add Insight. Each option is represented by a blue button with a white checkbox and white text.

### Coaching Status:

(this will depend on your site)

The example below shows

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

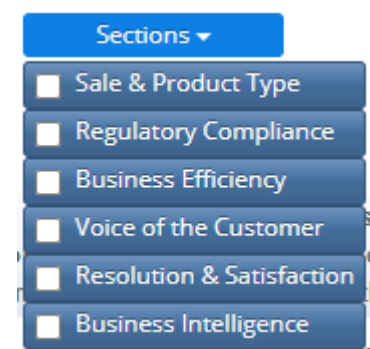


### Sections:

(this will depend on your campaign)

The example below shows

1. Sales & Product Type
2. Regulatory Compliance
3. Business Efficiency
4. Voice of the Customer
5. Resolution & Satisfaction
6. Business Intelligence




### Please note:

1. The filter will populate according to captured data except for the call date which will default to your campaign start and end date.  
ie: this means if you have no successful captures for a specific agent, that agent will not be part of the filter.
2. Only the date filter will affect the other filters.  
ie: This means if you select a date range that excludes a specific agent, that agent will not be on your filter list. However, if you select a specific Team Leader, all agents will still display
3. The data in the pop-up will always display the full estate – this may change in the future


## Dynamic Filter | Interactive Reports | Performance Metric Results

The Performance Metric has a current default setting as follows:


1. All section data is displayed with both upstream (business) and downstream (agent) attributes affecting the score.
2. Only the top 4 selections will be displayed. Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer.
3. Note target need to be set on level 2 to active colour.

	<b>Resolution &amp; Satisfaction Accuracy</b>				
Performance Metric	Target	Jul - 2019	Aug - 2019	Sep - 2019	
Ease of Understanding	98	99.0%	99.8%	99.7%	
Empathy	95	98.7%	98.5%	99.7%	
Friendly & Courteous	98	99.3%	99.7%	100.0%	
Issue Resolution	75	56.2%	59.0%	51.4%	
Knowledgeable	95	99.6%	99.6%	100.0%	


  

	<b>Business Efficiency Accuracy</b>				
Performance Metric	Target	Jul - 2019	Aug - 2019	Sep - 2019	
Business Rule Failure	90	90.8%	87.7%	91.9%	
Handle Time Concern	98	91.4%	91.4%	93.8%	
Repeat Concern	95	89.2%	90.5%	90.1%	
System Update Failure	90	100.0%	100.0%	100.0%	

	<b>Regulatory Compliance Accuracy</b>				
Performance Metric	Target	Jul - 2019	Aug - 2019	Sep - 2019	
Protected Customer Privacy (POPI)	99.5	99.8%	99.6%	99.7%	
Regulatory SOP Adherence	99.5	99.5%	99.4%	99.7%	
Regulatory Violation	99.5	100.0%	100.0%	100.0%	

	<b>Voice of the Customer Accuracy</b>				
Performance Metric	Target	Jul - 2019	Aug - 2019	Sep - 2019	
Expression of Dissatisfaction	95	89.0%	92.6%	92.0%	

Currently you can filter as follows:

1. Call Date
2. Agent
3. Team Leader
4. Manager

### Selection & Filtering Criteria

Date Range

Select the call date range:

01-Jul-2019
to
31-Oct-2019

Filter For a Service Line:

Client Care
Retentions

Agents
Team Leaders

Select one Or more Agents

Adele De Vries
Adrian Kruger
Alishia Govender
Aljeraue Appel
Amori Lemley
Andi Louw
Andre Potgieter
Anlyn Seafield
Anri Louw



The New Dynamic filter will default as follows:

1. All section data will default to both downstream (agent) controllable and upstream (business) non controllable failures.
2. Add Insights (BI) can be added using the Control Type filter Add Insight.
3. Section data will display in the order that it appears on your campaign form.
4. Output Metric data will display in the order that it appears on your campaign form.
4. All Sections will be displayed not just the top 4. Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer.
5. You will now be able to compare weeks or months.
6. As before your end data selections determines the data set shown.
7. Export Function added

You will now be able to filter as follows (depending on your campaign setting)

**Assessment details:**

(this will depend on your campaign)

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

**Control Types:**

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

**Coaching Status:**

(this will depend on your site)

The example below shows

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

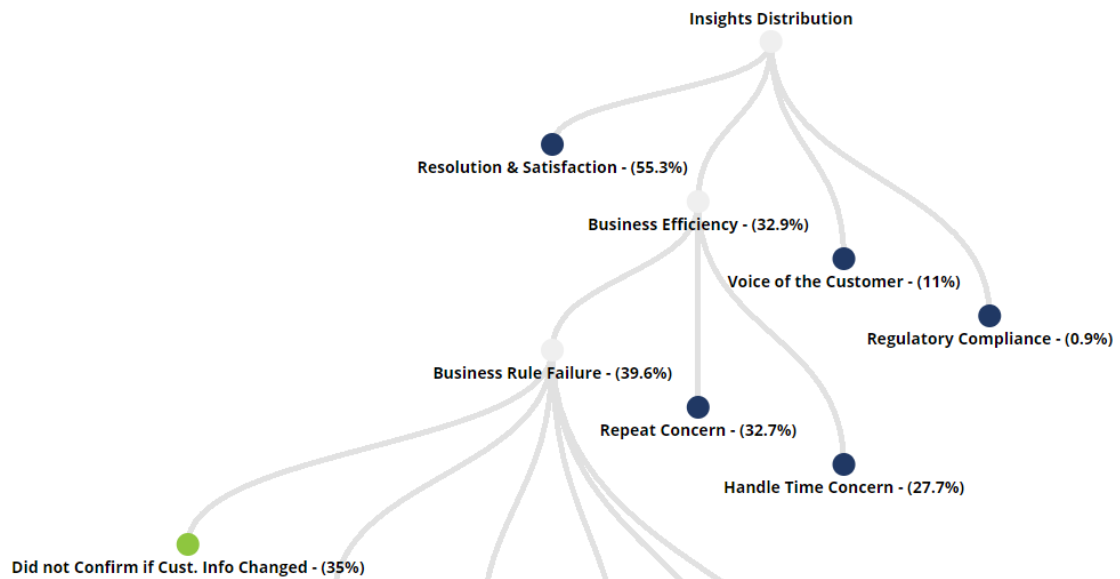
**Period:**

1. Month
2. Week

## Dynamic Filter | Interactive Reports | Performance Root Cause Analysis

The Performance Root Cause Analysis has a current default setting as follows:

1. All section data is displayed with both upstream (business) and downstream (agent) attributes affecting the score.
2. All Sections are included



Currently you can filter as follows:

1. Call Date
2. Agent
3. Team Leader
4. Manager

Selection & Filtering Criteria

Date Range

Select the call date range:

01-Jul-2019

to

31-Oct-2019

Filter For a Service Line:

Client Care

Retentions

Agents

Team Leaders

Select one Or more Agents

Adele De Vries

Adrian Kruger

Alishia Govender

Aljeraue Appel

Amori Lemley

Andi Louw

Andre Potgieter

Anlyn Seafiel

Anri Louw

The New Dynamic filter will default as follows:

1. All section data will default to both downstream (agent) controllable and upstream (business) non controllable failures.
2. You can now exclude sections from your root cause analysis, or only view one branch at a time.
3. Lowest child comments will be limited to the top 1000 comments.

You will now be able to filter as follows (depending on your campaign setting)

### Assessment details:

(this will depend on your campaign)

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

### Control Types:

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

### Coaching Status:

(this will depend on your site)

The example below shows

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback

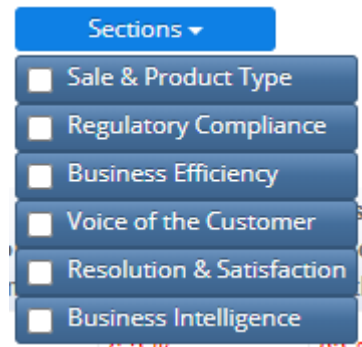
5. Team Leader Feedback

**Sections:**

(this will depend on your campaign)

The example below shows

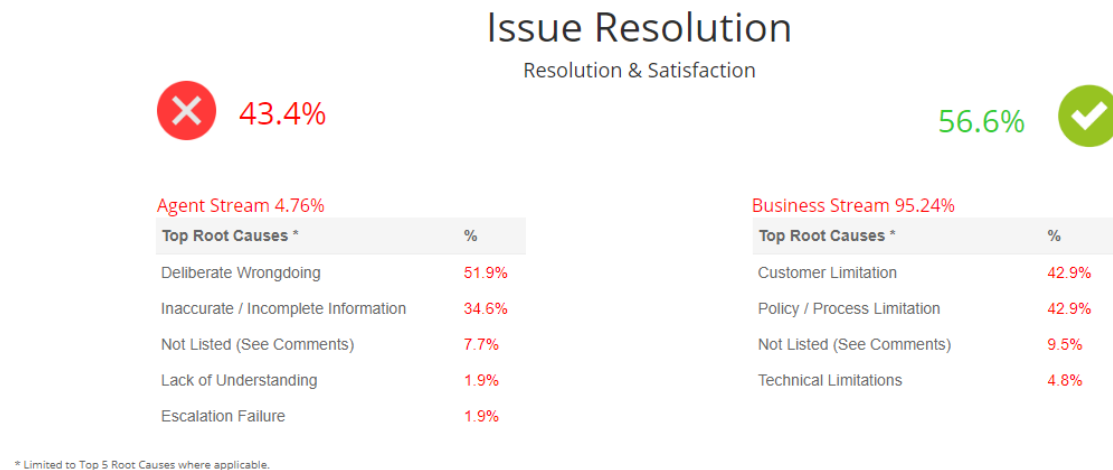
1. Sales & Product Type
2. Regulatory Compliance
3. Business Efficiency
4. Voice of the Customer
5. Resolution & Satisfaction
6. Business Intelligence



## Dynamic Filter | Interactive Reports | Performance Metric Drilldown

The Performance Metric Drilldown has a current default setting as follows:

1. All section data is displayed with both upstream (business) and downstream (agent) attributes affecting the score.
2. All Sections are included
3. This a high-level view of your failures / insights



Currently you can filter as follows:

1. Call Date
2. Performance Metric
3. Agent
4. Team Leader
5. Manager

#### Selection & Filtering Criteria

**Date Range** | **Performance Metric**

**Select the Performance Metric:**

- Issue Resolution
- Ease of Understanding
- Knowledgeable
- Empathy
- Friendly & Courteous

**Agents** | **Team Leaders**

**Select one Or more Agents**

- Aaron Rankoa
- Agente Matheba
- Bathabile Kau
- Bheki Manyeke
- Boikanyo Milazi
- Boipelo Mosalaesi
- Bongi Murabi
- Boniswa Matanzima
- Bongolo Mediso

The New Dynamic filter will default as follows:

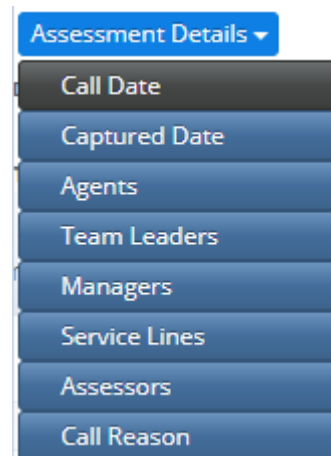
1. There are no major changes on this view, however you will now be able to filter much more strategically.
2. Failures / Insights indicated by the cross icon.

You will now be able to filter as follows (depending on your campaign setting)

**Assessment details:**

(this will depend on your campaign)

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

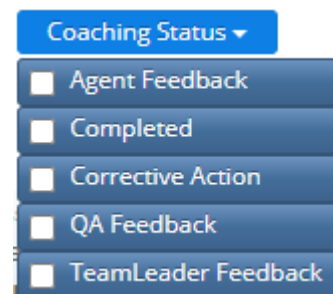


**Coaching Status:**

(this will depend on your site)

The example below shows

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

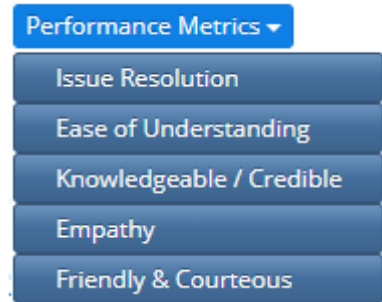


## Performance Metrics

(this will depend on your campaign)

The example below shows

1. Issue Resolution
2. Ease of Understanding
3. Knowledgeable / Credible
4. Empathy
5. Friendly & Courteous





## Dynamic Filter | Interactive Reports | Contact Disposition Matrix

The Contact Disposition Matrix has a current default setting as follows:

- Displays Call Reason distribution percentage, along with the associated Call Drive Matrix items. (Campaign dependant)
  - FCR (first call resolution)
  - SCR (Sales/Collections/Retention)
  - AHT (Average Handling Time)
  - Average Hold Time
  - Average Transfers
  - AQA CSAT
- If the entries for Hold, Transfers, FCR and SCR are not Yes/No question the results here are not valid.
- Calculations are directly associated with the call reasons and number thereof and not with unique assessment ids.

Contact Volume per Reason	%	AHT (s)	Repeats	On Hold	Transfers	AQA CSAT
Policy Enquiry	16 %	423	1 %	2 %	0 %	99 %
Debit Order Query	6 %	330	1 %	3 %	1 %	99 %
Cheaper Premium Request	6 %	784	0 %	6 %	7 %	97 %
Special Debit Arrangement	6 %	313	0 %	0 %	0 %	99 %
Cover Confirmation	5 %	319	2 %	2 %	3 %	100 %
Vehicle Detail Updates / Changes	5 %	445	0 %	0 %	0 %	100 %

Currently you can filter as follows (campaign dependant):

- Call Date
- Call Driver Matrix items
- Service Line
- Agent
- Team Leader
- Manager

Selection & Filtering Criteria

Date Range

Performance Metric

Select the Performance Metric:

Issue Resolution  
Ease of Understanding  
Knowledgeable  
Empathy  
Friendly & Courteous

Agents

Team Leaders

Select one Or more Agents

Aaron Rankoa  
Agente Matheba  
Bathabile Kau  
Bheki Manyeke  
Boikanyo Milazi  
Boipelo Mosalaesi  
Bongi Murabi  
Boniswa Matanzima  
Bopelo Medico

The New Dynamic filter will default as follows:

1. There are no major changes on this view, however you will now be able to filter much more strategically.
2. You will also now be able to either view CSAT or DSAT by changing the section sentiment.

You will now be able to filter as follows (depending on your campaign setting)

**Assessment details:**

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

Assessment Details ▾

Call Date

Captured Date

Agents

Team Leaders

Managers

Service Lines

Assessors

Call Reason

**CDM Metrics:**

1. SCR
2. FCR
3. AHT
4. On Hold
5. Transfer
6. CSAT / DSAT

CDM Metrics ▾

☐ SCR
 ☐ AHT
 ☐ On Hold
 ☐ Transfer
 ☐ CSat

**Coaching Status:**

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

Coaching Status ▾

☐ Agent Feedback

☐ Completed

☐ Corrective Action

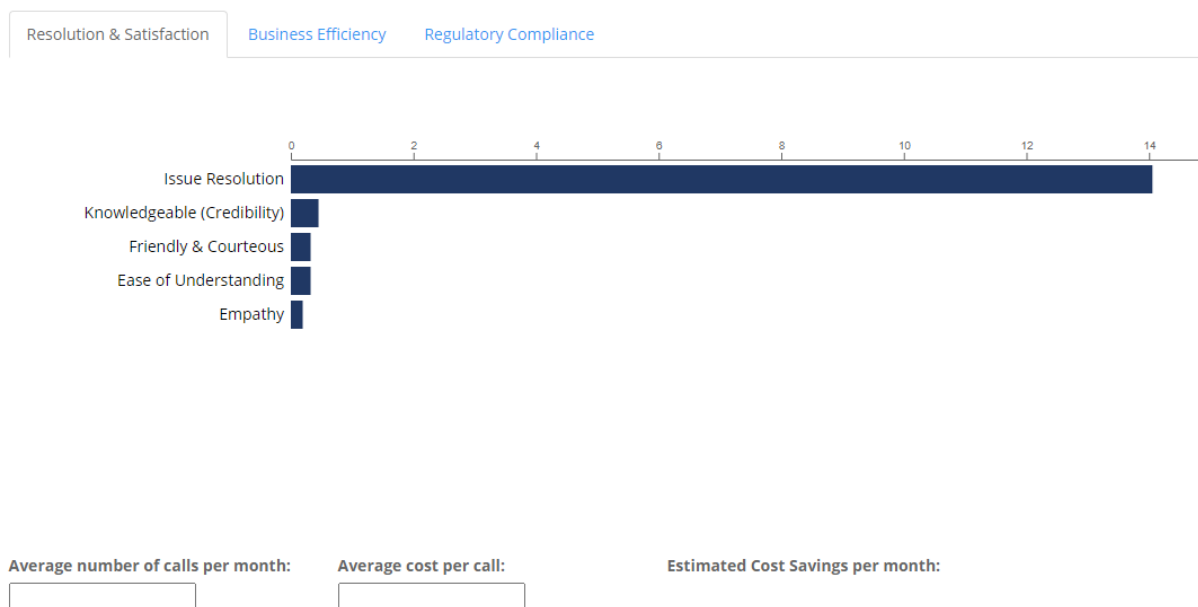
☐ QA Feedback

☐ TeamLeader Feedback

## Dynamic Filter | Interactive Reports | Lift Opportunities

The Lift Opportunities has a current default setting as follows:

1. Gives the potential opportunity to improve results and the associated cost reduction or effect by addressing a reoccurring issue (causal factor / root cause).
2. Calculation only works to the second last level.
3. Only shows the top three sections. Resolution & Solution, Business Efficiency and Regulatory Compliance.



Currently you can filter as follows (campaign dependant):

1. Call Date
2. Service Line
3. Agent
4. Team Leader
5. Manager

The New Dynamic filter will default as follows:

1. All Sections will show, in the order they appear on the campaign.
2. When you hover over the bars you will see the lift percentage.
3. The calculation can now be done on the lowest level.
4. Lift will be restricted to the top 10 where applicable.

You will now be able to filter as follows (depending on your campaign setting)

#### Assessment details:

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason

#### Control Types:

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

**Coaching Status:**

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

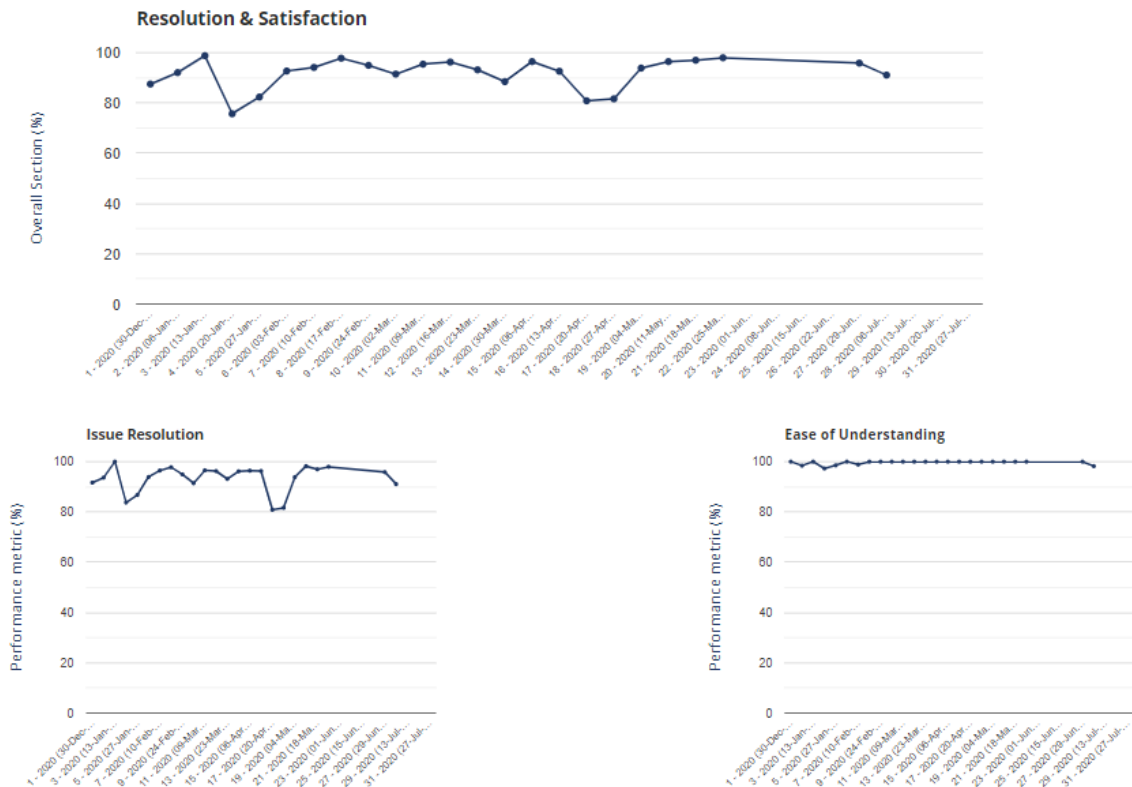
Coaching Status ▾

<input type="checkbox"/>	Agent Feedback
<input type="checkbox"/>	Completed
<input type="checkbox"/>	Corrective Action
<input type="checkbox"/>	QA Feedback
<input type="checkbox"/>	TeamLeader Feedback

## Dynamic Filter | Interactive Reports | Trending

Trending has a current default setting as follows:

1. Trending is the graphical representation of the Performance Metric Results.
2. Only gave the top 4 sections, Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer with their associated Output Metrics



Currently you can filter as follows (campaign dependant):

1. Call Date
2. Service Line
3. Agent
4. Team Leader
5. Manager
6. Period (Week or Month)

The New Dynamic filter will default as follows:

1. The Default Control Type will include upstream (business) and downstream (agent) attributes.
2. All Sections will show, in the order they appear on the campaign.
3. A Target Line has been added.

You will now be able to filter as follows (depending on your campaign setting)

**Assessment details:**

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason



**Control Types:**

1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

Control Types ▾

☐ Downstream

☐ Upstream

☐ Add Insight

**Period:**

1. Month
2. Week

Periods ▾

☒ Month

☐ Week

**Coaching Status:**

1. Agent Feedback
2. Completed
3. Corrective Action
4. QA Feedback
5. Team Leader Feedback

Coaching Status ▾

☐ Agent Feedback

☐ Completed

☐ Corrective Action

☐ QA Feedback

☐ TeamLeader Feedback