

## Send Coaching Feedback Workflow | v1

Using the new feedback functionality

1. This is only for Agent Feedback and should ideally not be used for any other type of feedback.
2. Feedback is distributed per assessment.
3. Only one agent feedback per link will be allowed.
4. Only interactions with feedback will allow for a mail to be submitted.

You can access the feedback function from the following app options:

- Campaign Management

On the Campaign Management via the *Coaching Feedback* link.

Selected Status:

RUN

Create New

ID	Description	Company	Product	Revision	Status	
16	<a href="#">Finance</a>   <a href="#">AQA</a>   <a href="#">PAIA</a>	Finance	QuantumAQA	87	RUN	<a href="#">Overview</a>   <a href="#">Reporting</a>   <a href="#">Dashboard</a>   <a href="#">Coaching Feedback</a>   <a href="#">Export</a> <a href="#">Edit</a>   <a href="#">Form-Wizard</a>   <a href="#">Question Wizard</a>   <a href="#">Assign-Users</a>   <a href="#">Copy</a>   <a href="#">Edit-List</a>   <a href="#">Edit-Questions</a>   <a href="#">Delete</a>
13	<a href="#">Finance</a>   <a href="#">Collections</a>   <a href="#">AQA</a>	Finance	QuantumAQA	140	RUN	<a href="#">Overview</a>   <a href="#">Reporting</a>   <a href="#">Dashboard</a>   <a href="#">Coaching Feedback</a>   <a href="#">Export</a> <a href="#">Edit</a>   <a href="#">Form-Wizard</a>   <a href="#">Question Wizard</a>   <a href="#">Assign-Users</a>   <a href="#">Copy</a>   <a href="#">Edit-List</a>   <a href="#">Edit-Questions</a>   <a href="#">Delete</a>

Here you can select *Review* of the assessment you require to send for feedback

List Of current Coaching Feedback assessments.				
Agent:		Status:		
ID	ConnectionID	Agent	Current Status	Initial and Current Feedback
5589	200145429900190624	Bella Tsotetsi	Agent Feedback	<b>Initial:</b> Well-done By <a href="#">omathatho@finance.co.za</a> <b>Last:</b> I will maintain this By <a href="#">omathatho@finance.co.za</a> On 15-07-2019
5700	200170068100190624	Khululwa Sobopha	Coach Feedback	<b>Initial:</b> No immediate payment was asked ,advised the consultant that she should always make sure that she requests for an immediate on every call in order to increase cash collection By <a href="#">rnaidoo@finance.co.za</a> <b>Last:</b> Coaching not detailed - you need to coach on what is an intimate payment ,how to obtain one and the importance of getting an immediate payment .With your coaching above its easy for the consultant to say she did not ask for an immediate payment because she does not know how to .You coaching needs to assist her to know the process. Khululwa's feedback needs to be a commitment that she knows what needs to be done and she will do it going forward. By <a href="#">oodira@finance.co.za</a> On 19-07-2019
5762	2001466414Q0190625	Prince Metiso	Agent Feedback	<b>Initial:</b> I was still negotiating with the client then call dropped , I redialed no reply . By <a href="#">lsmith2@finance.co.za</a> <b>Last:</b> I was still negotiating with the client then call dropped , I redialed no reply . By <a href="#">lsmith2@finance.co.za</a> On 08-07-2019
5796	200135538100190624	Yonela Mfanta	Dispute - Review	<b>Initial:</b> Immediate is mentioned on the conversation towards the end of the call, after the discussion consultant had with the client By <a href="#">rthwala@finance.co.za</a> <b>Last:</b> It is only an immediate payment if it is via IVR or same day strike as per F processes. By <a href="#">liyana@finance.com</a> On 17-07-2019

Now follow **Step 1 – 5** on Page 6...

- Performance Tracker

Access the Performance Tracker via the *Interactive Dashboard*

## Interactive Performance Tracker

Campaign: Finance | Collections | AQA

**Interactive Performance Tracker** [Overview](#) | [Reporting](#) | [Dashboard](#) | [Coaching Feedback](#) | [Export](#) | [List Campaigns](#)

Show Filter

From Date: 01-Jul-2019 | To Date: 30-Sep-2019

**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
Abia Morudi	23	3	87.0 %	91.3 %	95.7 %	100.0 %	100.0 %
Althea Strauss	178	47	73.6 %	93.8 %	77.5 %	98.3 %	94.9 %
Bilkish Mohamed	265	79	70.2 %	95.5 %	73.2 %	98.5 %	96.6 %
Brenda Mkhize	203	50	75.4 %	98.5 %	78.8 %	98.0 %	96.1 %
Brenda Vorster	6	3	50.0 %	100.0 %	50.0 %	100.0 %	66.7 %
Busisiwe Gida	194	49	74.7 %	96.4 %	75.8 %	99.5 %	95.9 %
Charlotte Mathebula	216	70	67.6 %	94.9 %	71.3 %	97.7 %	96.3 %

**Interactive Reports**

- Introduction
- Dashboard
- Performance Metric Results
- Contact Disposition Matrix
- Root Cause Analysis
- Lift Opportunities
- Performance Tracker**
- Trending
- Performance Metric Drilldown
- Interaction Checks

Here you can select your team or an agent and select an interaction for coaching

**Performance Tracker Drill Down**

Connection ID	Date Call	Coaching Status	Passed	Agent Name
3001526275L0190903	03-Sep-2019	✓	✓	Charmaine Ndhlovu
2001620411L0190903	03-Sep-2019	✓	✓	Charmaine Ndhlovu
2001785990O0190904	04-Sep-2019	✗	✗	Charmaine Ndhlovu
3001747924L0190903	03-Sep-2019	✓	✗	Elizabeth Esemang
1001802671J0190902	02-Sep-2019	✓	✓	Elizabeth Esemang
1001888411S0190906	06-Sep-2019	✓	✓	Felicity Chabangu
1001480219Q0190905	05-Sep-2019	✓	✓	Felicity Chabangu
1001981982O0190904	04-Sep-2019	✓	✓	Getrude Maluleke
3001008478O0190904	04-Sep-2019	✓	✓	Getrude Maluleke
1001693239J0190902	02-Sep-2019	⊖	✓	Karabo Seloane
1001658730J0190902	02-Sep-2019	⊖	✓	Karabo Seloane
2001002834S0190906	06-Sep-2019	✓	✓	Nonhlanhla Khoza

**Coaching in Progress**

Coaching in Progress
2
7
14
1
0
1
2
5
8

Add the feedback for the interaction if there is none, it will need to be updated before an email can be sent

## Create Coaching Feedback

Campaign: Finance | Collections | AQA

**Overview of Campaign and Coaching Feedback**
[Adding Feedback](#) | [Overview](#) | [Reporting](#) | [Coaching Feedback](#) | [List Campaigns](#)

**Campaign Description:** Finance | Collections | AQA  
**Campaign Status:** RUN  
**Assessment Status:** Successful Captured

**ConnectionID:** 200178599000190904  
**Service Line:**  
**Call Agent Name:** Charmaine Ndhlovu  
**Assessed on:** Fri - 13 Sep 2019

**Create a new Coaching Feedback**
[Campaign Details](#) | [Campaign Feedback](#)

**Classification**
Quality Assessment

**Feedback Comment**
Test 1234....

**Assigned User**
nicola@geniianalytics.com











Create

Now follow **Step 1 – 5** on Page 6...

- Overview

Select *Audit* of the applicable interaction

Additional Information

Assessments <a href="#">Audits</a>							
List of Assessments done in the selected time period.							
Call Date	ConnectionID	Agent Name	Service Line	Assessed By	Captured Date	Captured	
02-Sep-2019	1001658730J0190902	Karabo Seloane		khozasisi@finance.com	13-Sep-2019	 	<a href="#">Audit</a> <a href="#">View</a>
02-Sep-2019	1001376428J0190902	Mimi Moshapo		conjwao@finance.com	13-Sep-2019	 	<a href="#">Audit</a> <a href="#">View</a>
02-Sep-2019	1001693239J0190902	Karabo Seloane		khozasisi@finance.com	13-Sep-2019	 	<a href="#">Audit</a> <a href="#">View</a>
04-Sep-2019	2001009421O0190904	Lucia Makgalemele		conjwao@finance.com	13-Sep-2019	 	<a href="#">Audit</a> <a href="#">View</a>
05-Sep-2019	3001504336O0190905	Judith Radebe		khozasisi@finance.com	13-Sep-2019	 	<a href="#">Audit</a> <a href="#">View</a>

Select *Feedback*

## Interaction Analytics Audit

**Campaign:** Finance | Collections | AQA **8662**

**User ID:** admin@geniianalytics.com **0**

[View](#) [Feedback](#)

**ConnectionID:** 200178599000190904

**Call Date:** 04-Sep-2019

**Agent ID:** Charmaine Ndhlovu

Validate

**Call Details - Review**

**Assessors UserID and Captured date:** marogaa@finance.com | 13-Sep-2019

**Date of Call and Duration:** 04-Sep-2019 | 24m 0s

**Agent ID:** Charmaine Ndhlovu

**Agent Classification:** RPC - PTP

**System Reference Number:** 3948976

**Manger Details:** Kefiloe Raphela

If there is no feedback assigned, it will need to be updated before an email is sent

Create a new Coaching Feedback

Campaign Details | Campaign Feedback

Classification

Quality Assessment

Feedback Comment

Test

Assigned User

admin@genianalytics.com

Create

Now follow **Step 1 – 5** on Page 6...

- Agent Detailed PDF Report

Access the Agent Detail PDF Report via the *Reporting* option of the relevant campaign (filter either by your team or for an agent and for the selected period)

Home Applications Management Admin

Hello Nicola Log off

Reporting
Campaign: Finance | Collections | AQA

QuantumAQA reporting.

Overview | Reporting | Dashboard | Coaching Feedback | Export | List Campaigns

Show Filter

Agent Detail PDF Report

Following report shows call statistics for selected Agents over a selected time period:

☒ Include Operational and Upstream Details
☒ Include Additional Insight Details

Agent Detail Report PDF Report

Team Leader Performance PDF Report

Following report shows summary metric for the 4 performance metrics: Resolution & Satisfaction, Business Efficiency, Regulatory Compliance and VOC

Report Type: Team Leader and Agent Performance

Team Leader Performance PDF Report

Campaign Productivity PDF Report

Following report shows productivity, the number of assessments done by Analysts for a selected time period. Please note "Agent ID" filtering is ignored.

Type: Assessor Hourly Report

Include all Customer's Campaigns

Required Agent Assessment - Weekly Tabulated Report

Review the required assessments per agent in a tabulated report. The Analyst would be able to review which weeks they have not assessed an agent over the period selected.

Weekly Agent Assessment Tabulated Report

Call Assessment Distribution PDF Report

Generate a report to review the Team Leader and Agent call distribution for Successful, Problem or Absent assessments. Reported by Month.

Assessment Distribution PDF Report

Coaching Feedback Distribution PDF Report

Generate a report to review the distribution of feedback classifications the Team Leader and Agent by Month.

Coaching Feedback Distribution PDF Report

In the coaching PDF select *Review* on the interaction you would like to provide coaching feedback on

<b>Call ID:</b> 200132489770190712	Manage: <input type="text"/>	Date of Call: <b>12-Jul-2019</b>	<a href="#">Review»</a>
TeamLeader: <input type="text"/>			

**Business Efficiency** Controllable by Agent *Additional comment:*

**Business Process Adherence**

- ↳ Call Classification Failure
- ↳ Incorrect Call Classification Selected

*Consultant selected an incorrect call classification*

**Voice of the Customer** Controllable by Agent *Additional comment:*

**Expression of Dissatisfaction**

- ↳ Downstream
- ↳ Lack of Understanding
- ↳ Illogical Steps/Instructions not clear

*Consultant selected an incorrect call classification*

**Additional Commentary:** Additional Insight *Additional comment:*

n/a

**Summary of Interaction:** Additional Insight *Additional comment:*

TPC - Voicemail service not activated

Add the feedback for the interaction if there is none, it will need to be updated before an email can be sent

## Create Coaching Feedback

Campaign: Finance | Collections | AQA

Overview of Campaign and Coaching Feedback		<a href="#">Adding Feedback</a>   <a href="#">Overview</a>   <a href="#">Reporting</a>   <a href="#">Coaching Feedback</a>   <a href="#">List Campaigns</a>	
<p><b>Campaign Description:</b> <a href="#">Finance</a>   <a href="#">Collections</a>   <a href="#">AQA</a></p> <p><b>Campaign Status:</b> RUN</p> <p><b>Assessment Status:</b> Successful Captured</p>	<p><b>ConnectionID:</b> 200178599000190904</p> <p><b>Service Line:</b></p> <p><b>Call Agent Name:</b> Charmaine Ndhlovu</p> <p><b>Assessed on:</b> Fri - 13 Sep 2019</p>		

**Create a new Coaching Feedback** [Campaign Details](#) | [Campaign Feedback](#)

**Classification** Quality Assessment ▼

**Feedback Comment** Test 1234...

**Assigned User** nicola@geniianalytics.com

[Create](#)

Now follow **Step 1 – 5** on Page 6...

**Step 1:** You will then select *Send Agent Coaching Report* and a window will pop-up

Agent Coaching PDF Report
View Captured Form
Send Agent Coaching Report

### Coaching Feedback Details

Date	Classification	Comment	Assessed By
08-Jul-2019	TeamLeader Feedback	No immediate payment was asked ,advised the consultant that she should always make sure that she requests for an immediate on every call in order to increase cash collection	rmaidoo@finance.co.za
08-Jul-2019	Agent Feedback	I will make sure that I ask for immediate payment on all of my accounts in order to improve my cash collections	rmaidoo@finance.co.za
08-Jul-2019	Completed	Immediate payment will be asked as per coaching done	rmaidoo@finance.co.za
19-Jul-2019	Coach Feedback	Coaching not detailed - you need to coach on what is an intimidate payment ,how to obtain one and the importance of getting an immediate payment .With your coaching above its easy for the consultant to say she did not ask for an immediate payment because she does not know how to .You coaching needs to assist her to know the process. Khululwa's feedback does not indicate whether she understand how to get an immediate payment,her feedback needs to be a commitment that she knows what needs to be done and she will do it going forward.	oodira@finance.co.za

Add additional feedback Comment >

**Step 2:** Enter the agent's email address to the *Recipient Email* box and select *Submit*

Send Agent Coaching FeedBack Report

Recipient Email:
lynn@geniianalytics.com
Submit
Close

You will receive the following acknowledgement notification.

Send Agent Coaching FeedBack Report

Email sent with attached document.
Close

**Step 3:** The agent will receive the following email which will include a pdf report and a link to submit feedback

QA Coaching Feedback | Action / Review Required

noreply
To: Lynn Petersen

AQA\_Agent\_Coaching\_Report.pdf
82 KB

# GEN

QA | Coaching Feedback

Your Coaching Report has arrived...

Open the attachment and take a look at your most recent Coaching Feedback. Review areas of opportunity to improve or feedback from your Team Leader.

Checking your Coaching Report helps you spot what could be affecting your performance and staying on top of your QA score.

Respond with your feedback and commitments below which will be captured against your coaching log for your Team Leader to review:

[Submit Feedback](#)

**Step 4:** Once they have selected the link they will be redirected to a secure website where they can submit their comments by adding their notes and selecting *Submit Feedback*

**GEN** QA | Coaching Feedback

Your Coaching Report has arrived...

Open the attachment and take a look at your most recent Coaching Feedback. Review areas of opportunity to improve or feedback from your Team Leader.

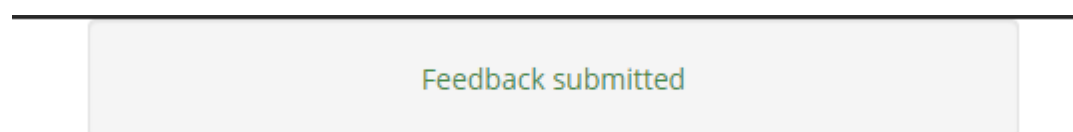
Checking your Coaching Report helps you spot what could be affecting your performance and staying on top of your QA score.

Respond with your feedback and commitments below which will be captured against your coaching log for your Team Leader to review:

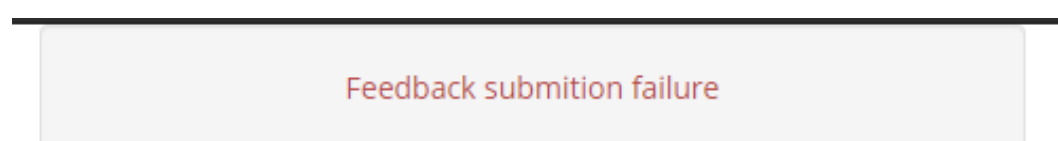
I acknowledge feedback

Submit Feedback

They will get the following acknowledgement notification.



This link will only allow for one submission and if it is accessed again the following notification will come up.



**Step 5:** Once feedback is submitted the app will update accordingly.

Coaching Feedback Details			
Date	Classification	Comment	Assessed By
08-Jul-2019	TeamLeader Feedback	No immediate payment was asked ,advised the consultant that she should always make sure that she requests for an immediate on every call in order to increase cash collection	rnaidoo@finance.co.za
08-Jul-2019	Agent Feedback	I will make sure that I ask for immediate payment on all of my accounts in order to improve my cash collections	rnaidoo@finance.co.za
08-Jul-2019	Completed	Immediate payment will be asked as per coaching done	rnaidoo@finance.co.za
19-Jul-2019	Coach Feedback	Coaching not detailed - you need to coach on what is an intimidate payment ,how to obtain one and the importance of getting an immediate payment .With your coaching above its easy for the consultant to say she did not ask for an immediate payment because she does not know how to .You coaching needs to assist her to know the process. Khululwa's feedback does not indicate whether she understand how to get an immediate payment,her feedback needs to be a commitment that she knows what needs to be done and she will do it going forward.	oodira@finance.co.za
17-Apr-2020	Agent Feedback	I acknowledge feedback	lynn@geniianalytics.com
Add additional feedback Comment >			

