Genii Analytics | Interactive Reports | User Guide

29 Jan-21

Contents

General Icons

Open Filter Icon

This icon will display your filter options per report. And will therefore have different selections options depending on your campaign configurations and the report selected.

Clear Filter icon

This icon will clear all existing filter selections and set all the default parameters.

The dates will default to the campaign set dates.

Info icon

This will show on some reports and it will display information like the default settings for the report you are on.

This icon may also contain a user guide.

Breadcrumb

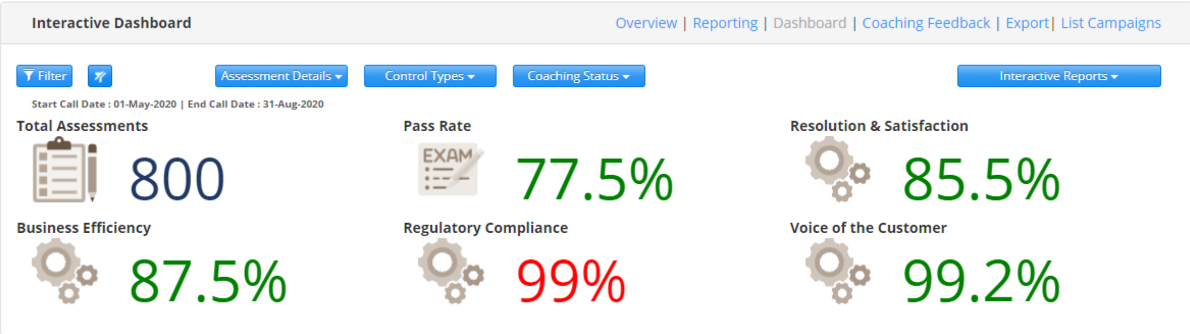
Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020 | Agents : Anri Louw

This is a line below the filter buttons.

It tells you which selections you have made on that page.

Dashboard

This is an overall view of the section scores.

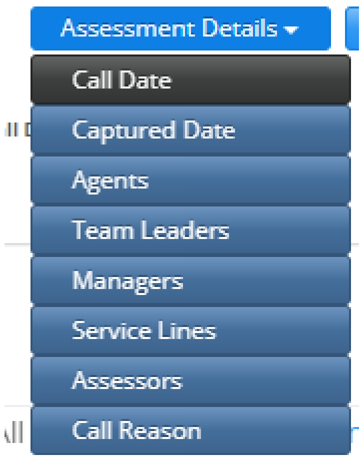


The filter will default as follows:

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 were 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.

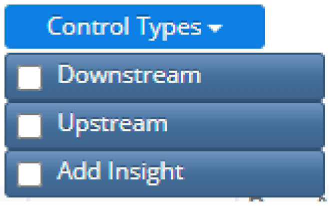
You will be able to filter as follows (depending on your campaign setting)

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)

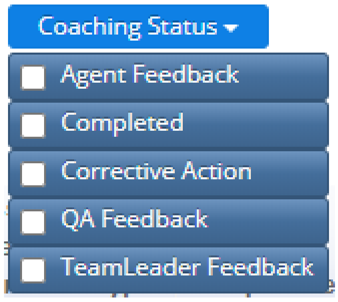


Coaching Status:

(this will depend on your site)

The example 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*

Performance Metric Results

This is an overall view of the output metric scores.

Resolution & Satisfaction (Export to CSV)

Performance Metric	Target	31 - 2020	32 - 2020	33 - 2020	34 - 2020
Issue Resolution	85	93.2%	87.8%	81.6%	84.2%
Ease of Understanding	98	100%	100%	100%	100%
Knowledgeable (Credibility)	98	100%	100%	100%	100%
Empathy	95	100%	100%	100%	100%
Friendly & Courteous	98	100%	100%	100%	100%

Business Efficiency (Export to CSV)

Performance Metric	Target	31 - 2020	32 - 2020	33 - 2020	34 - 2020
Handle Time Concern	98	100%	100%	100%	100%
Repeat Concern	95	96.2%	96%	100%	100%
Business Rule Failure	98	97.4%	95.9%	92.3%	97.4%
System Update Failure	98	98.7%	94.7%	96.2%	97.4%
No Conversion Opportunity	80	97.2%	100%	100%	100%
Conversion Failure	99.5	95.8%	98.1%	98.3%	98.3%

Regulatory Compliance (Export to CSV)

Performance Metric	Target	31 - 2020	32 - 2020	33 - 2020	34 - 2020
Protected Customer Privacy	99.5	100%	100%	100%	100%
Regulatory SOP Adherence	99.5	100%	100%	100%	--
Regulatory Violation	99.5	100%	100%	100%	100%

Voice of the Customer (Export to CSV)

Performance Metric	Target	31 - 2020	32 - 2020	33 - 2020	34 - 2020
Expression of Dissatisfaction	95	100%	100%	98.7%	100%

The filter will default as follows:

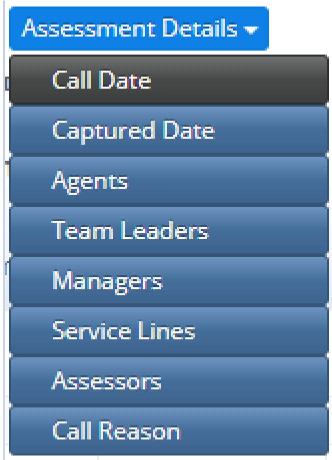
1. All section data will default to all control types, downstream (agent) controllable, upstream (business) non controllable failures and business Insights.
2. Section data will display in the order that it appears on your campaign form.
3. Output Metric data will display in the order that it appears 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.
8. ISO Week designations are implemented with weeks starting on a Monday. Unless dates cross years where week 53 will become part of week 1 of the new year.
9. Note the last date determines your data set. Therefore, ensure that you select the correct date. ie: for weeks ensure your end date is on a Sunday and for months that you've selected the last day of that month.

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

Assessment details:

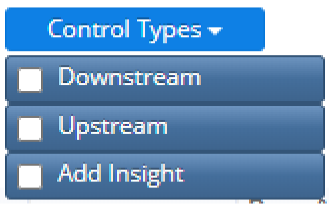
(this will depend on your campaign)

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)

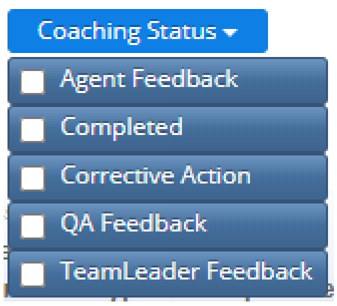


Coaching Status:

(this will depend on your site)

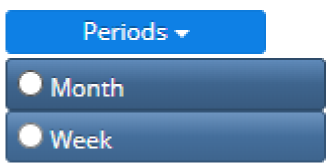
The example shows

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



Period:

1. Month
2. Week



Contact Disposition Matrix

Displays Call Reason distribution percentages, along with the associated Call Drive Matrix items.

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 %

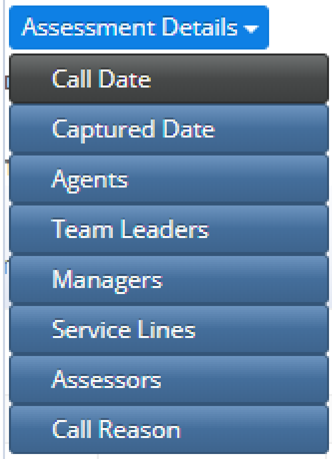
The filter will default as follows:

1. Call Drive Matrix (Campaign dependant)
    a. FCR (first call resolution)
    b. SCR (Sales/Collections/Retention)
    c. AHT (Average Handling Time)
    d. Average Hold Time
    e. Average Transfers
    f. AQA CSAT
    g. Pass Rate
2. If the entries for Hold, Transfers, FCR and SCR are not Yes/No question the results here are not valid.
3. Calculations are directly associated with the call reasons and number thereof and not with unique assessment ids.

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

Assessment details:

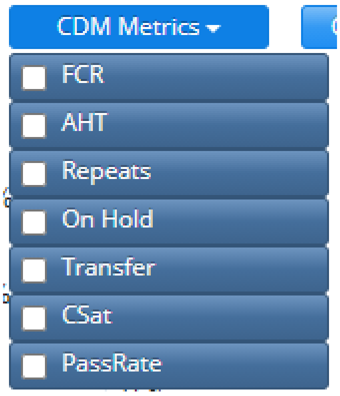
1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Manager
6. Service Lines
7. Assessors
8. Call Reason



CDM Metrics:

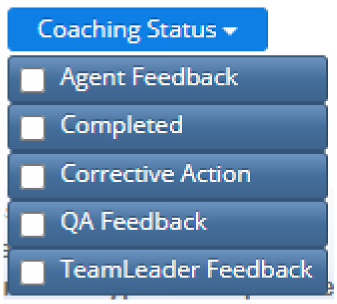
The example shows

1. FCR
2. AHT
3. Repeats
4. On Hold
5. Transfer
6. CSAT / DSAT
7. Pass Rate

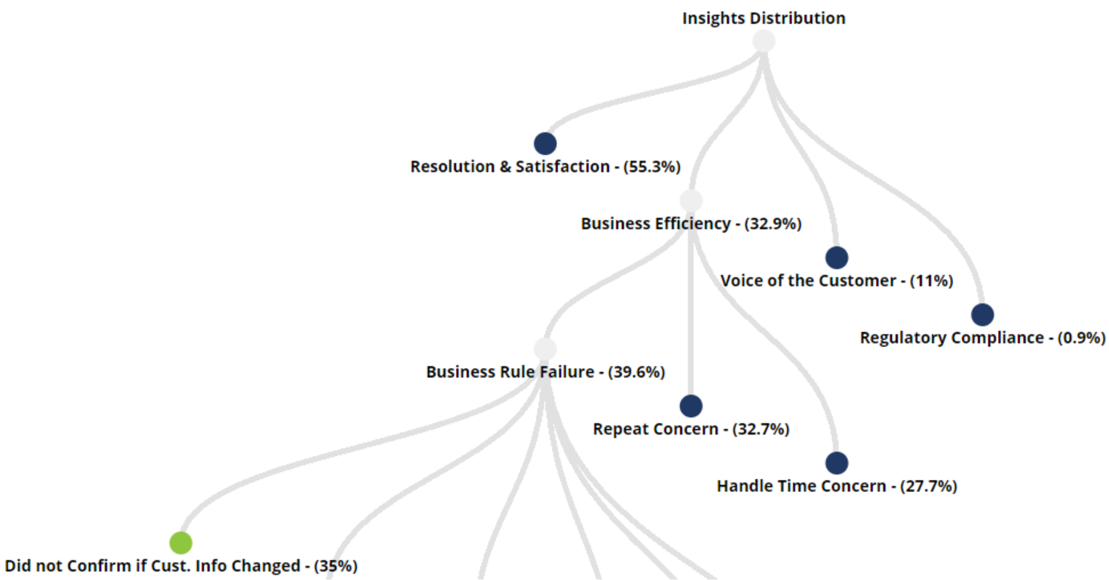


Coaching Status:

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



Root Cause Analysis



The filter will default as follows:

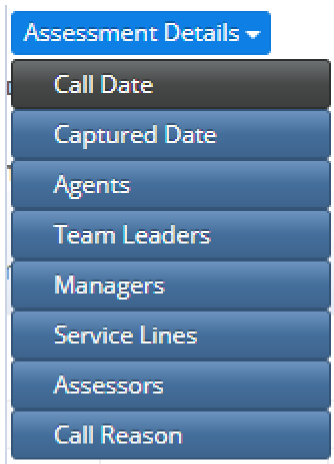
1. All section data will default to all control types, downstream (agent) controllable, upstream (business) non controllable failures and business Insights.
2. You can now exclude sections from your root cause analysis, or only view one branch at a time.
3. Lowest child comments will be limited to the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

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

Assessment details:

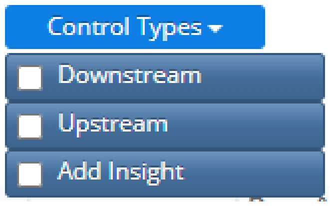
(this will depend on your campaign)

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)

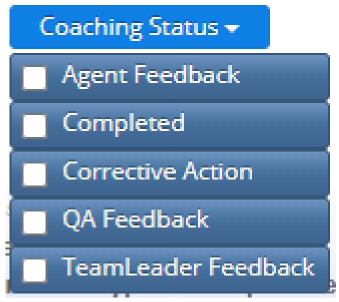


Coaching Status:

(this will depend on your site)

The example shows

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

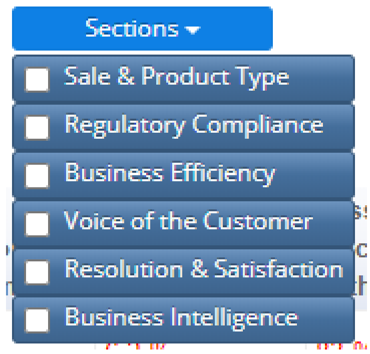


Sections:

(this will depend on your campaign)

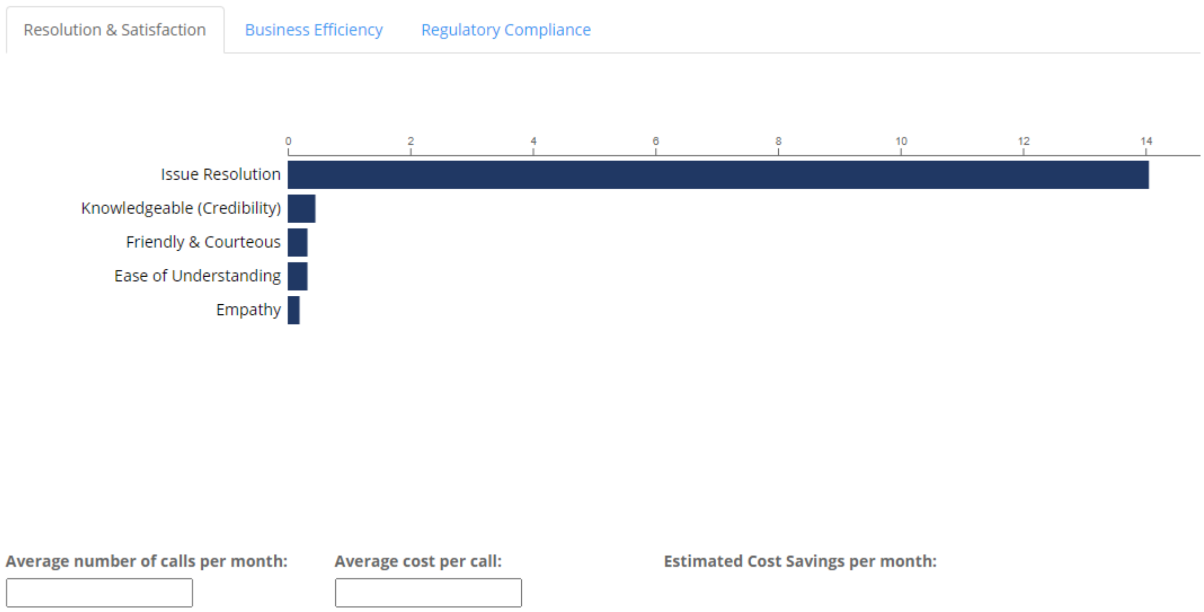
The example shows

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



Lift Opportunities

Gives the potential opportunity to improve results and the associated cost reduction or effect by addressing a reoccurring issue (causal factor / root cause).



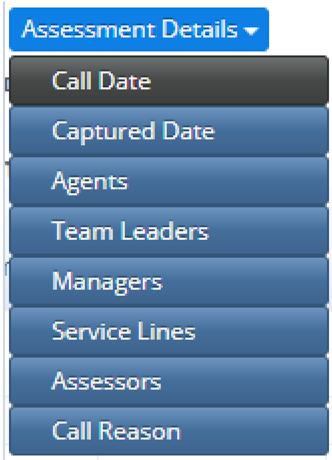
The filter will default as follows:

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

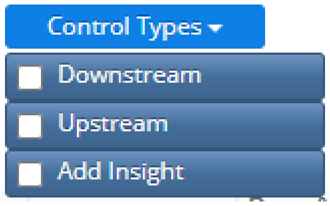
Assessment details:

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



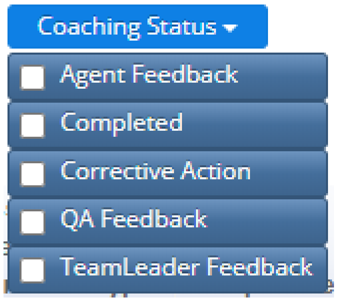
Control Types:

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



Agent Metric Results

This is an overall view of the output metric scores per agent per month and is similar to the Performance Metric Results.

- Eureka Monageng	--%	83.3%	85.7%
- Resolution & Satisfaction	--%	83.3%	85.7%
Issue Resolution	--%	83.3%	85.7%
Ease of Understanding	--%	83.3%	100%
Knowledgeable (Credibility)	--%	100%	100%
Empathy	--%	100%	100%
Friendly & Courteous	--%	100%	100%
- Business Efficiency	--%	83.3%	85.7%
Handle Time Concern	--%	100%	100%
Repeat Concern	--%	83.3%	85.7%
Business Rule Failure	--%	100%	100%
System Update Failure	--%	100%	85.7%
Conversion Failure	--%	100%	100%

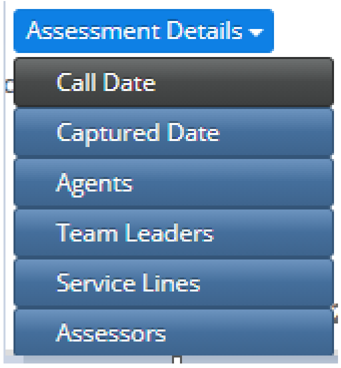
The filter will default as follows:

1. All section data will default to downstream (agent) controllable.
2. Section data will display in the order that it appears on your campaign form.
3. Output Metric data will display in the order that it appears on your campaign form.
4. As before your end data selections determines the data set shown.
5. The export Function will export the lowest level (output metric scores)

You will 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. Service Lines
6. Assessors



Control Types:

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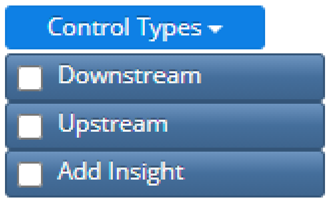
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)



Performance Tracker

Service Lines

Export to CSV

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

Export to CSV

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 Leafe	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 Pather	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

Export to CSV

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

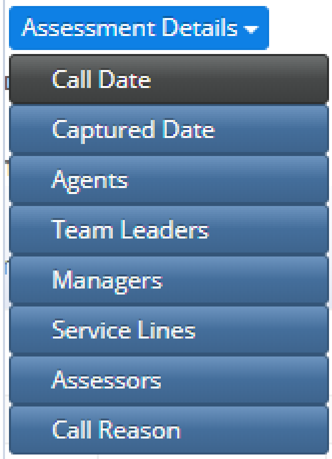
The filter will default as follows:

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. The pass rate includes all applicable sections. However, 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. The tables will include Manager where applicable.

You will 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:

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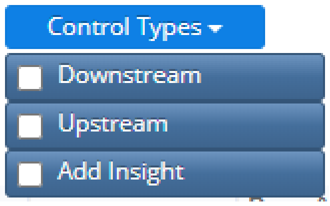
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)



Coaching Status:

(this will depend on your site)

The example shows

1. Agent Feedback
2. Completed
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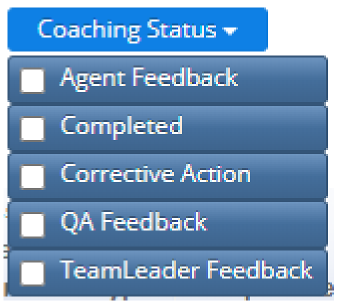
5. Team Leader Feedback

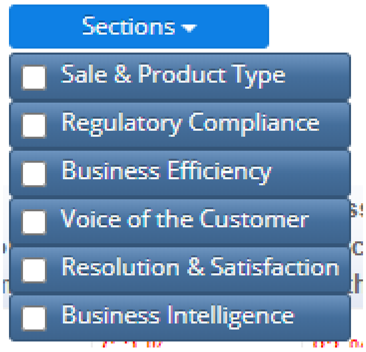


Sections:

(this will depend on your campaign)

The example shows

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

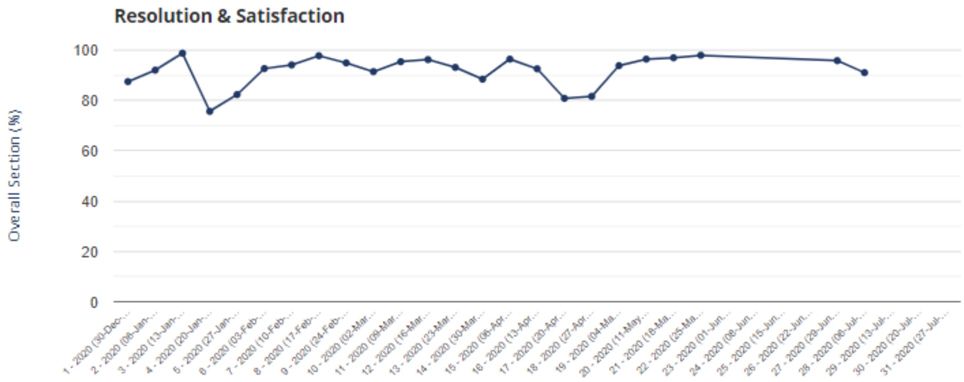


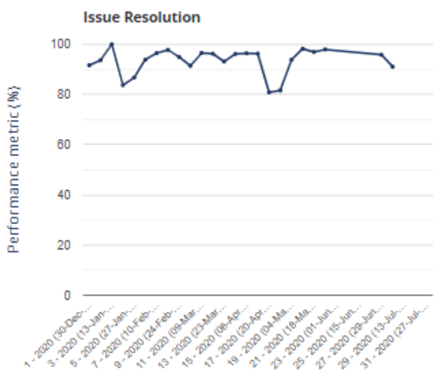
Please note:

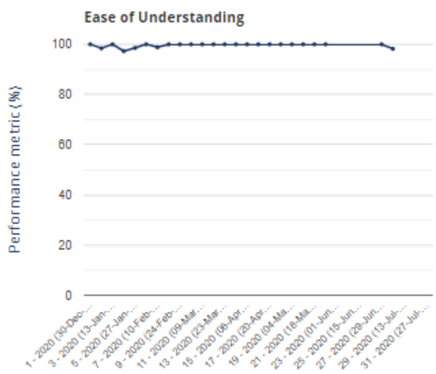
1. The filter will populate according to captured data except for the call date which will default to your campaign start and end date.
   ie: this means if you have no successful captures for a specific agent, that agent will not be part of the filter.
2. Only the date filter will affect the other filters.
   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.

Trending

Trending is the graphical representation of the Performance Metric Results.







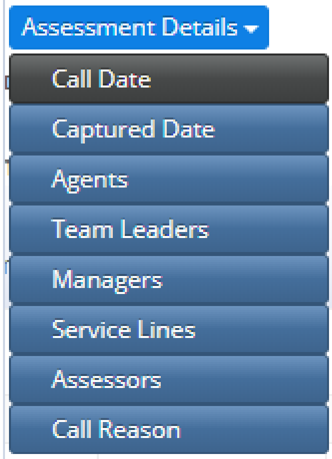
The filter will default as follows:

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.
4. Month or Week trends can be viewed.

You will 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:

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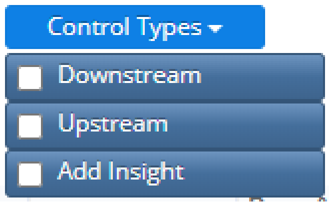
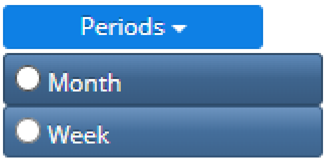
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)



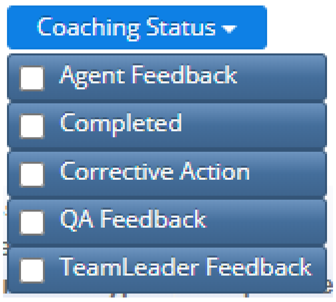
Period:

1. Month
2. Week



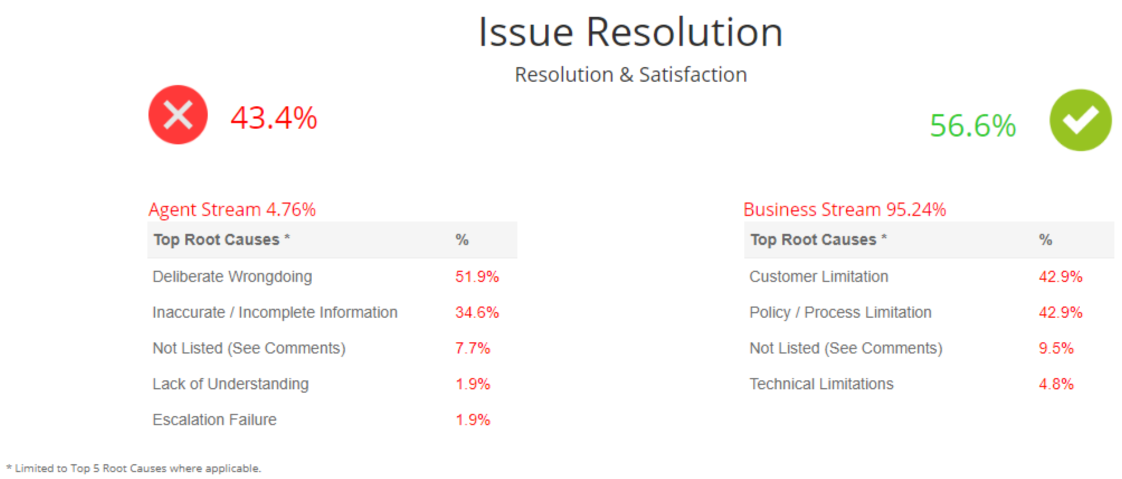
Coaching Status:

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



Performance Metric Drilldown

This a high-level view of your failures / insights



The filter will default as follows:

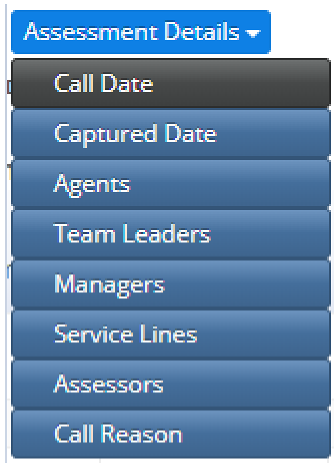
1. All section data will default to all control types, downstream (agent) controllable, upstream (business) non controllable failures and business Insights.
2. Failures / Insights indicated by the cross icon.

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

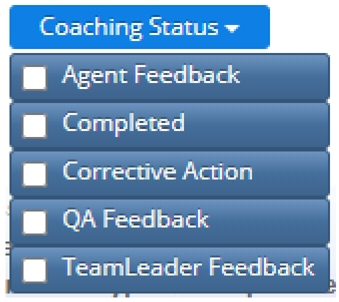


Coaching Status:

(this will depend on your site)

The example 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 shows

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

Grouped Tracker

Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- 799	87.7 %	0 | 0	96.7 %	89.8 %	98.9 %	99.5 %

ServiceLines	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- Client Care	799	87.7 %	0 | 0	96.7 %	89.8 %	98.9 %	99.5 %

TeamLeaders	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- Bradley Carradus	200	88 %	0 | 0	96 %	92 %	99 %	99.5 %

Agents	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
+ Abednego Naidoo	22	95.5 %	0 | 0	100 %	95.5 %	100 %	100 %
+ Ammarah	22	100 %	0 | 0	100 %	100 %	100 %	100 %

This report is a version of the Performance Tracker and so has similar defaults, detailed below.

The biggest advantage of this report is that it will allow you to group your filer options according to your needs.

The example above is the default and will be ranked in the order you see displayed on the new Groupings filter.

However, you may choose to order the data by day, team leader and agent which will give you the view below.

Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020 | Groupings : Date,TeamLeaders,Agents

Export

Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- 799	87.7 %	0 | 0	96.7 %	89.8 %	98.9 %	99.5 %

Date	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- 02-05-2020	12	83.3 %	0 | 0	100 %	83.3 %	100 %	100 %

TeamLeaders	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
- Bradley Carradus	5	100 %	0 | 0	100 %	100 %	100 %	100 %

Agents	Total Assessments	Pass Rate	Coachings	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer
Abednego Naidoo	1	100 %	0 | 0	100 %	100 %	100 %	100 %
Ammarah Dawood	1	100 %	0 | 0	100 %	100 %	100 %	100 %

To achieve this result, you will make your selection on in the order you require.

First Date then Team Leader and finally Agent.

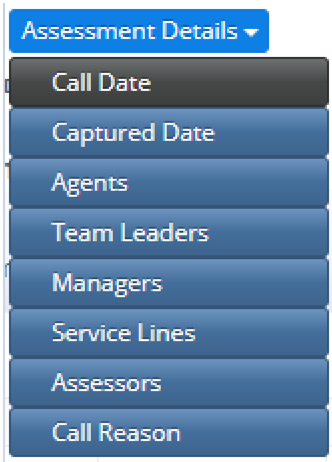
The filter will default as follows:

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. The pass rate includes all applicable sections. However, 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. Grouping will be in the order displayed from top to bottom.

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

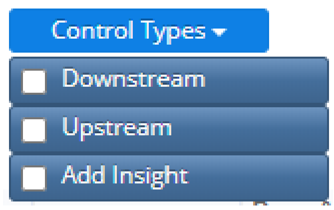
Assessment details:

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)

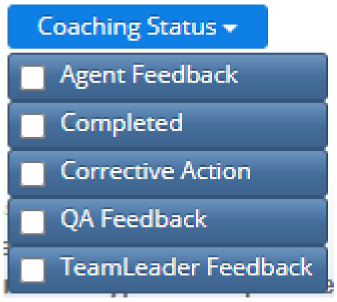


Coaching Status:

(this will depend on your site)

The example shows

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

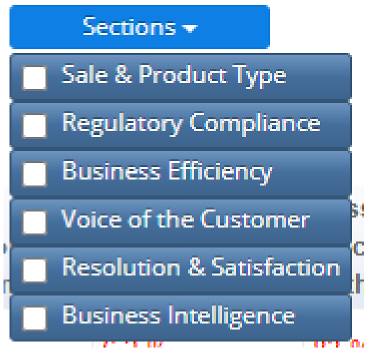


Sections:

(this will depend on your campaign)

The example shows

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

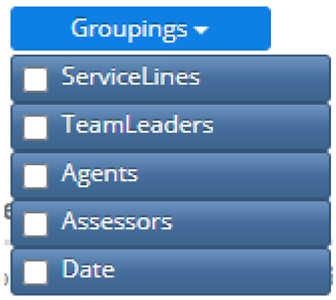


Groupings:

(this will depend on your campaign)

The example shows

1. Service Lines
2. Team Leaders
3. Agents
4. Assessors
5. Date (depends on the date format selected in the Assessment details filter)



The following reports are specific to the Quality Manager Role (those who manager assessors/auditors) and will not be part of the standard reports.

Gauge Performance Metric Results

This report gives you the Output Metric Accuracies per Gauge.

Resolution & Satisfaction Export to CSV

Performance Metric	2001917980X0200824	1001917980X0200823	Average
Issue Resolution	100%	33.33%	66.66%
Ease of Understanding	66.67%	33.33%	50%
Knowledgeable (Credibility)	66.67%	66.67%	66.67%
Empathy	66.67%	66.67%	66.67%
Friendly & Courteous	66.67%	66.67%	66.67%
Section Accuracy	73.34%	53.33%	63.34%

Business Efficiency Export to CSV

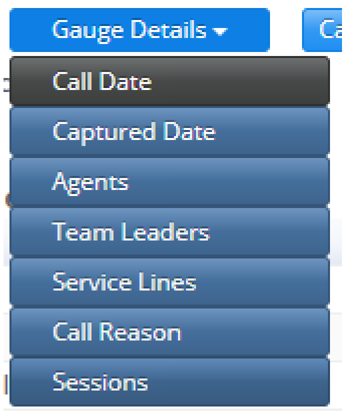
Performance Metric	2001917980X0200824	1001917980X0200823	Average
Handle Time Concern	66.67%	66.67%	66.67%
Repeat Concern	66.67%	66.67%	66.67%
Business Rule Failure	100%	66.67%	83.34%
System Update Failure	66.67%	66.67%	66.67%
No Conversion Opportunity	66.67%	66.67%	66.67%
Conversion Failure	100%	66.67%	83.34%
Section Accuracy	77.78%	66.67%	72.22%

You will now be able to filter as follows with reference to the Gauge capture.

Gauge details:

(this will depend on your campaign)

1. Call Date
2. Captured Date
3. Agent
4. Team Leader
5. Service Lines
6. Call Reason
7. Sessions (Connection ID)



Calibration details:

1. Assessors

Calibration Assessor Summary

This report gives you the Output Metric Accuracies per Assessor.

Export to CSV

Resolution & Satisfaction

Performance Metric	Toulouse@geniianalytics.com	Tracey@geniianalytics.com	Bob@geniianalytics.com	Average
Issue Resolution	50%	50%	100%	66.67%
Ease of Understanding	50%	0%	100%	50%
Knowledgeable (Credibility)	100%	50%	50%	66.67%
Empathy	100%	50%	50%	66.67%
Friendly & Courteous	100%	50%	50%	66.67%
Average Section Accuracy	**80%**	**40%**	**70%**	**63.33%**

Export to CSV

Business Efficiency

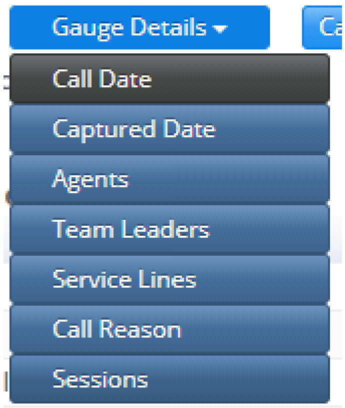
Performance Metric	Toulouse@geniianalytics.com	Tracey@geniianalytics.com	Bob@geniianalytics.com	Average
Handle Time Concern	100%	50%	50%	66.67%
Repeat Concern	100%	50%	50%	66.67%
Business Rule Failure	100%	50%	100%	83.33%
System Update Failure	100%	0%	100%	66.67%
No Conversion Opportunity	100%	0%	100%	66.67%

You will now be able to filter as follows with reference to the Gauge capture.

Gauge details:

(this will depend on your campaign)

8. Call Date
9. Captured Date
10. Agent
11. Team Leader
12. Service Lines
13. Call Reason
14. Sessions (Connection ID)



Calibration details:

2. Assessors

FIN