

# Genii Analytics | Calibration | AQA

V1. December 2020

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## Scope

This feature is to assist the quality manager.

Allowing them to ensure that all their staff have the same understanding of varies output metrics.

Identifying those who are not aligned for retraining.

Only the Quality Manager (and higher) profile will be able to view all reports (interactive, csv and pdf) associated with gauges and calibrations.

Calibrations can be done on live campaigns without affecting agent results and reports can now be generated focussing on the assessor's productivity and not the agents.

It should be noted that the variance will be calculated using the answers on the Question Form and not the Call Details form.

It should also be noted than only the output metric selections (Yes, No or N/A) are used to create the variance. Any variation below level 2 is not included in the calculation.

## Process

1. Create a gauge (standard) assessment and allocate a target.
  - a. This needs to be done before any assessors does a calibration on the same connection id.
  - b. If an assessor has already done an assessment or calibration on a connection id, you will not be able to create /use the connection id to create a gauge.

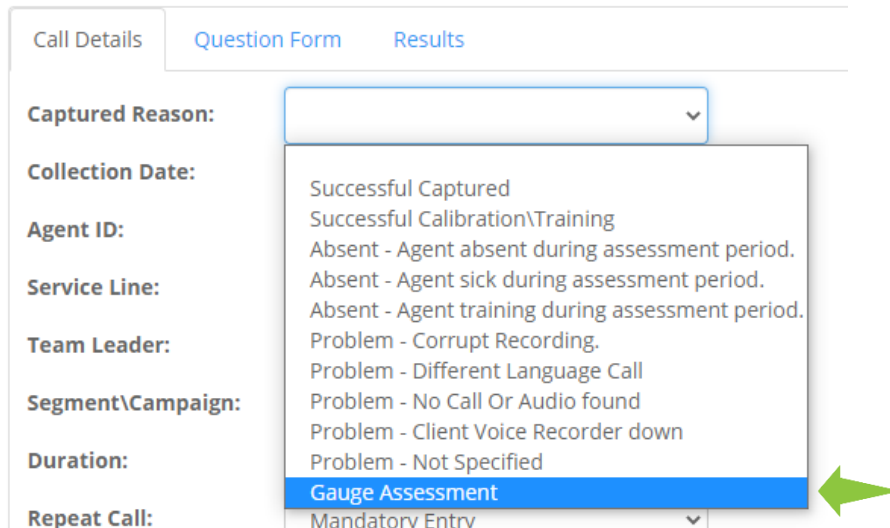
(There is an issue logged to have calibration or gauge done in any order -  
[https://github.com/GeniiDevCore/DevWebApps\\_IA\\_core/issues/1984](https://github.com/GeniiDevCore/DevWebApps_IA_core/issues/1984))

2. Have the assessors do calibration calls using the same connection id.
  - a. Each assessor can only do one calibration per gauge.

## Creating A Gauge

As Quality Manager (QM) you will be able to use a live campaign to do calibration on without affecting the agent's scores.

When you access the capture form, you will select Gauge from the call reason list.



Call Details   Question Form   Results

**Captured Reason:** ▼

**Collection Date:**

**Agent ID:**

**Service Line:**

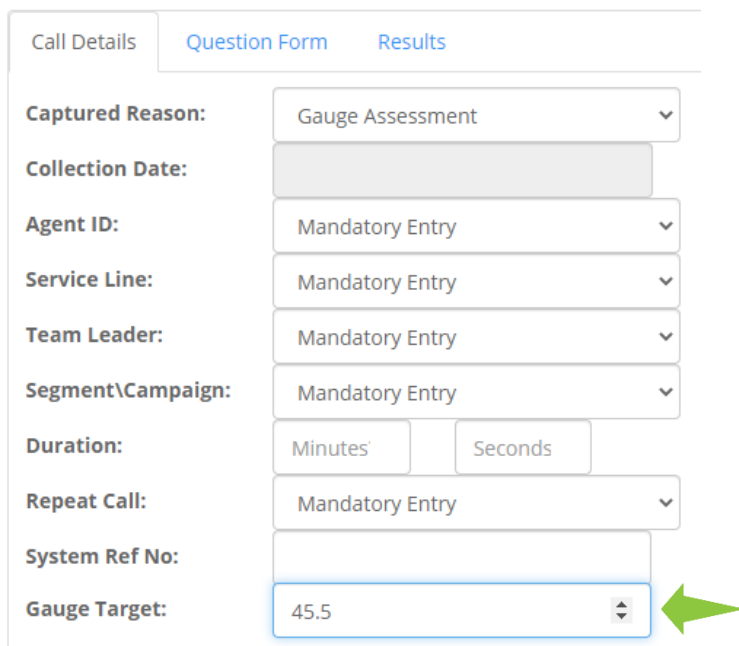
**Team Leader:**

**Segment\Campaign:**

**Duration:**

**Repeat Call:** ▼

Successful Captured  
Successful Calibration\Training  
Absent - Agent absent during assessment period.  
Absent - Agent sick during assessment period.  
Absent - Agent training during assessment period.  
Problem - Corrupt Recording.  
Problem - Different Language Call  
Problem - No Call Or Audio found  
Problem - Client Voice Recorder down  
Problem - Not Specified  
**Gauge Assessment**  
Mandatory Entry



Call Details   Question Form   Results

**Captured Reason:** Gauge Assessment ▼

**Collection Date:**

**Agent ID:** Mandatory Entry ▼

**Service Line:** Mandatory Entry ▼

**Team Leader:** Mandatory Entry ▼

**Segment\Campaign:** Mandatory Entry ▼

**Duration:** Minutes' Seconds

**Repeat Call:** Mandatory Entry ▼

**System Ref No:**

**Gauge Target:** 45.5 ▼

You will see that at the bottom left-hand side another input box will appear.

This is your target box; you will have to set a target for each gauge and this target will align the colours on your interactive reports.

Your target must consist of whole numbers and can accept one decimal point (75; 75.5).

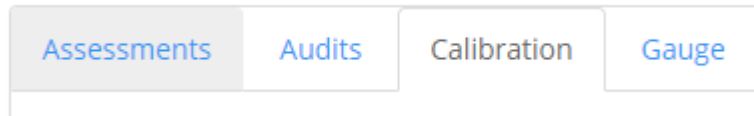
Once you have validated and submitted your gauge, you can pass the connection id to your assessors so that they can assess the same call on the same campaign.

They will use the same connection id and select Successful Calibration\Training from the Captured Reason drop down.

The screenshot shows a web application interface with three tabs at the top: 'Call Details', 'Question Form', and 'Results'. On the left side, there are several labels for form fields: 'Captured Reason:', 'Collection Date:', 'Agent ID:', 'Service Line:', 'Team Leader:', 'Segment\Campaign:', and 'Duration:'. The 'Captured Reason' dropdown menu is open, showing a list of options. The option 'Successful Calibration\Training' is highlighted in blue. A green arrow points to this option. The other options in the dropdown are: 'Successful Captured', 'Absent - Agent absent during assessment period.', 'Absent - Agent sick during assessment period.', 'Absent - Agent training during assessment period.', 'Problem - Corrupt Recording.', 'Problem - Different Language Call', 'Problem - No Call Or Audio found', 'Problem - Client Voice Recorder down', and 'Problem - Not Specified'.

## Views

There are two new views available to you as the QM on the Overview page.



## Calibration

You may have noticed that you no longer see calibration calls on the Assessment tab on the Overview page.

Calibrations have been moved to a tab on their own. This means that Audits on calibration calls can only be done by you as the QM.

Here you will see calibrations done against a gauge as well as those without a gauge.

AssessmentsAuditsCalibrationGauge

List of Calibration Assessments done in the selected time period.

Connection ID	Assessed By	Captured Date	Feedback Status	Variance	PDF	Review
2001917980X0200824	Toulouse@genianalytics.com	19-Jan-2021		0%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
2001917980X0200824	Tracey@genianalytics.com	19-Jan-2021		26.67%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
2001917980X0200824	Bob@genianalytics.com	19-Jan-2021		40%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
1001917980X0200824	lynn@genianalytics.com	19-Jan-2021		Gauge Not Found	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
1001917980X0200823	Toulouse@genianalytics.com	19-Jan-2021		20%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
1001917980X0200823	Tracey@genianalytics.com	19-Jan-2021		100%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>
1001917980X0200823	Bob@genianalytics.com	19-Jan-2021		0%	<a href="#">Download PDF</a>	<a href="#">Audit</a> <a href="#">Feedback</a> <a href="#">View</a>

Those with a gauge will display a variance score and will have a pdf to download whereas the other will not.

Here individual connection ids with the associated assessor will display.

The variance score should be as low as possible.

From this page you can Audit, give Feedback and View the calibration.

Below is an example of the pdf download.

Here you have a view of each output metric and its' score as well as an overall section accuracy score.

There is also a Review link that will take you to the feedback page, like the one used for agent feedback.

## Assessor Calibration Report



Campaign: Insurance | Client Care | AQA

Assessor: Tracey@geniianalytics.com

Call ID: 2001917980X0200824  
Agent: Diego Antonio Popple  
Team Leader: Kushen Govender  
Date of Call: 06/07/2020 00:00:00  
Date of Capture: 19/01/2021 10:17:04  
Service Line: Client Care  
System Ref Number: Test

[Review»](#)

### Overview of Calibration Performance Metrics:

1) Resolution & Satisfaction	Accuracy	Target
1.01) Issue Resolution	100.00 %	75.00 %
1.02) Ease of Understanding	0.00 %	75.00 %
1.03) Knowledgeable (Credibility)	100.00 %	75.00 %
1.04) Empathy	100.00 %	75.00 %
1.05) Friendly & Courteous	100.00 %	75.00 %
Average Section Accuracy	80.00 %	75.00 %
2) Business Efficiency	Accuracy	Target
2.01) Handle Time Concern	100.00 %	75.00 %
2.02) Repeat Concern	100.00 %	75.00 %
2.03) Business Rule Failure	100.00 %	75.00 %
2.04) System Update Failure	0.00 %	75.00 %
2.05) No Conversion Opportunity	0.00 %	75.00 %
2.06) Conversion Failure	100.00 %	75.00 %
Average Section Accuracy	66.67 %	75.00 %
3) Regulatory Compliance	Accuracy	Target
3.01) Protected Customer Privacy	100.00 %	75.00 %
3.02) Regulatory SOP Adherence	0.00 %	75.00 %
3.03) Regulatory Violation	100.00 %	75.00 %
Average Section Accuracy	66.67 %	75.00 %
4) Voice of the Customer	Accuracy	Target
4.01) Expression of Dissatisfaction	100.00 %	75.00 %
Average Section Accuracy	100.00 %	75.00 %

## Review page

Overview of Campaign and Coaching Feedback

Adding Feedback | [Overview](#) | [Reporting](#) | [Dashboard](#) | [Coaching Feedback](#) | [Export](#) | [List Campaigns](#)

Campaign Description: [Insurance | Client Care | AQA](#)

ConnectionID: 2001917980X0200824

Campaign Status: RUN

Service Line: Client Care

Assessment Status: Successful Calibration\Training

Call Agent Name: Diego Antonio Popple

Assessor: Tracey@geniianalytics.com

Assessed on: Tue - 19 Jan 2021

Create a new Coaching Feedback

[Campaign Details](#) | [Campaign Feedback](#)

Classification: Completed

Feedback Comment:

Assigned User: lynn@geniianalytics.com

## Gauge

The Gauge tab is a summary tab.

This tab will give the number of gauges created.

The number of calibrations done against each gauge as well as the average variance to target.

There are also place holders for other future reports.

Connection ID	Creation Date	No. of Calibrations	No. of Failed Calibrations	Average Variance	PDF	Online Report	Edit
1001917980X0200823	19-Jan-2021	3	Under Construction	40%	Under Construction	Under Construction	<a href="#">Audit</a> <a href="#">View</a>

You may notice that you can audit the gauge, note that if you do change the output metric answers on the gauge it will realign the scores on all the link calibrations.

## Interactive reports

You will find the following reports on the Dashboard menu option.

The dynamic filter here will only apply to the gauge and not the answers given by the assessors.

Whereas the Views showed the variance to gauge, the Interactive reports will show you the accuracies.

Each table can be exported to .csv.





## Gauge Performance Metric

This report will give you the average Performance Metric Results per Gauge.

As you can see from the screen shot you will be able to see if your assessors are improving from gauge to gauge.

The latest gauge will be first and so on until the average score column.

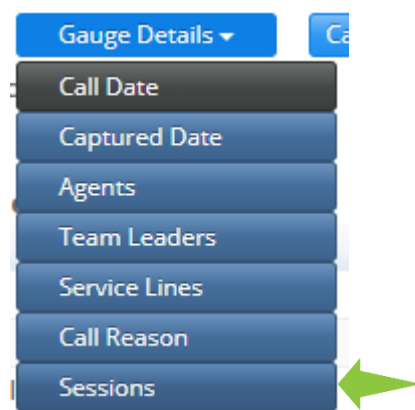
You will note that 66.67% have different colours, this is due to the gauge target you set when completing the gauge.

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%	

If you have more than 3 gauges, you can use the Sessions filter on the Gauge filter to select the gauges you wish to compare.



You can also select specific assessors if you want to check for individual improvement across gauges.



In the example below, Bob's scores have gotten worse since the initial gauge.

Start Call Date : 01-May-2020 | End Call Date : 31-Aug-2020 | Assessors : Bob@geniianalytics.com

Resolution & Satisfaction				Export to CSV
Performance Metric	2001917980X0200824	1001917980X0200823	Average	
Issue Resolution	100%	100%	100%	
Ease of Understanding	100%	100%	100%	
Knowledgeable (Credibility)	0%	100%	50%	
Empathy	0%	100%	50%	
Friendly & Courteous	0%	100%	50%	
Section Accuracy	40%	100%	70%	

Business Efficiency				Export to CSV
Performance Metric	2001917980X0200824	1001917980X0200823	Average	
Handle Time Concern	0%	100%	50%	
Repeat Concern	0%	100%	50%	
Business Rule Failure	100%	100%	100%	

## Assessor Performance Metric

This report will allow you to compare peers.

You can do across all gauges or select a specific gauge/session using the filter.

You can also specify which assessors you wish to compare using the filter.

Resolution & Satisfaction

[Export to CSV](#)

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%

Business Efficiency

[Export to CSV](#)

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%

## Notes:

This is the initial rollout for this function.

New features will be added as dictated by necessity.