Genii Analytics | PDF Reports

V1. December 2020

Contents

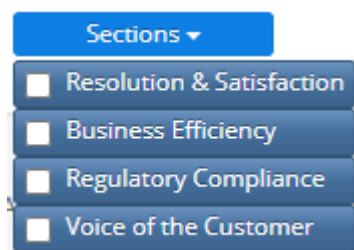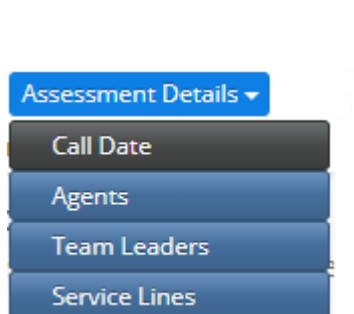| Revision	Date	Name	Description
1.0	2020/12/01	L Petersen	Initial doc.
1.1	2021/06/07	L Petersen	Added QA Reports

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.

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.

AQA PDF Reports

These reports are geared around Genii methodology and these reports speak to that.

Agent Detail PDF Report

This report will give you section scores for a selected period per agent, with associated comments.

The report will display controllable failures per assessment with a Review hyperlink to Coaching Feedback.

Upstream and Added insight detail can be added to the report using the tick box buttons.

Agents are grouped by Team Leader so you may find an agent in two or more places on the report if they have moved teams within the requested period.

Associated Date Range = Call date

Coaching Status = coaching completed (Feedback Completed) vs coaching started (anything prior to Feedback Completed)

Pass Rate = 1- (Controllable Failures / Total Assessments)

Section Scores = 1- (Controllable Failures / Total Assessments)

This report has a summary and a detailed section.

The summary is per agent and will include the section scores and pass rate as well as the total assessments and total failed assessments for the selected period.

Only 4 Section scores will display,

The default will include all section in the Pass Rate score, you can view other Section scores by selecting them on the Section Filter

Summary Section:

| Campaign: | **Insurance \| Collections \| AQA** | | | | | | | |
| Call Date Range: | Friday 03-Jan-2020 to Wednesday 08-Jul-2020 | | | | | | | |

Team Leader **Shaakirah Choonara**	Calls	Criteria not met	%Pass	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer	Coaching Status
Antoinette De Jager	43	3	93%	100%	95%	98%	100%	0/0

The detail of the assessments will be displayed below the summary

If a standard report (no ticks enabled) is extracted only the detail labelled *Controllable by Agent* will display.

Using the summary above this means that of the total 43 calls only 3 will display with the connection ids and failure detail as only 3 had controllable failures.

If you put a tick in the *Include Additional Insight Detail* you will get the detail for all 43 calls only because when we create a campaign we identify the Summary of Interaction Comment Box as BI or additional insights.

Therefore, by selecting this option you will get the summary comment for each connection is as well as the controllable failure comments

Agent Detail PDF Report

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

Please note , the section filter can only take 4 sections, the default sections are the first 4 sections as they appear on the Capture form. You cannot pick more than 4 sections

☐ Include Operational and Upstream Details
☐ Include Additional Insight Details

Agent Detail PDF Report

If you put a tick in the *Include Operational and Upstream Detail* you will connection ids where calls failed both upstream and downstream causal factors

If you select both you will get all details as per the sample below

Full Report – Detailed Section:

Team Leader Performance PDF Report

Team Leader and Agent Performance

This a summary report with 3 layers on complexity.

The default report will give you the agent and team leader summary information, including total calls, total agent failed assessments, Pass Rate and Section scores.

The default report will give summary information per team leader and agent.

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

It will also include how many coaching feedbacks where completed vs how many where started.

Report View:

Campaign: **Insurance | Client Care | AQA**
Call Date Range: Thursday 02-Jan-2020 to Wednesday 08-Jul-2020

Team Leader **Bradley Carradus**	Calls	Criteria not met	%Pass	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer	Coaching Status
Abednego Naidoo	33	3	91%	100%	97%	94%	100%	0/0
Ammarah Dawood	41	5	88%	98%	88%	100%	100%	0/0
Anriette Viljoen	37	3	92%	100%	92%	100%	100%	0/0
Bella Masekela	42	6	86%	90%	90%	100%	98%	0/0
Byron September	39	2	95%	100%	95%	100%	100%	0/0
Celeste Ryan	2	0	100% ☑	100%	100%	100%	100%	0/0
Elfreda Pieterse	32	2	94%	100%	94%	100%	100%	0/0
Emely Mollootimile	1	1	0%	100%	0%	100%	100%	0/0
Hlengiwe Dlamini	38	5	87%	92%	89%	100%	100%	0/0
Laurette Poonsamy	1	0	100% ☑	100%	100%	100%	100%	0/0
Lebo Makweng	31	3	90%	94%	97%	100%	100%	0/0
Liza Petzer	15	3	80%	93%	93%	93%	100%	0/0
Mandy Manning	1	0	100% ☑	100%	100%	100%	100%	0/0
Maxine Cromhout	38	13	66%	89%	79%	89%	100%	0/0
Tshepiso Pitso	40	17	58%	80%	78%	93%	98%	0/1
Yash Ramsuran	38	11	71%	79%	79%	89%	95%	0/0
Bradley Carradus	429	74	82.8%	92.8%	88.6%	96.7%	99.1%	

Team Leader **Cherese Leafe**	Calls	Criteria not met	%Pass	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer	Coaching Status
Abednego Naidoo	1	1	0%	0%	100%	100%	100%	0/0
Ammarah Nair	4	1	75%	100%	75%	100%	100%	0/0
Anri Louw	13	1	92%	100%	92%	100%	100%	0/1
Anriette Viljoen	1	0	100% ☑	100%	100%	100%	100%	0/0
Byron September	1	0	100% ☑	100%	100%	100%	100%	0/0
Dieago Antonio Popple	25	7	72%	92%	80%	100%	100%	0/1
Dylan Van Straaten	1	0	100% ☑	100%	100%	100%	100%	0/0
Eureka Monageng	32	4	88%	91%	94%	97%	100%	0/0
Graig van Rooi	37	15	59%	84%	68%	89%	97%	0/0
Josh Francis	40	10	75%	88%	80%	93%	98%	0/0

Team Leader Performance

The next report will give the team leader summary excluding the agent information.

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 Performance ⌄]

[Team Leader Performance PDF Report]

Report View:

Team Leader Performance

Analytical Quality Assurance

Campaign: **Insurance | Client Care | AQA**
Call Date Range: Thursday 02-Jan-2020 to Wednesday 08-Jul-2020

	Calls	Criteria not met	%Pass	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer	Coaching Status
Bradley Carradus	429	74	82.8%	92.8%	88.6%	96.7%	99.1%	
Cherese Leafe	373	83	77.7%	90.6%	82.8%	95.4%	98.9%	
Kushen Govender	358	60	83.2%	91.3%	89.9%	96.4%	99.4%	
Thrishan Pather	390	62	84.1%	94.6%	87.4%	98.2%	99.2%	
Vimal Roopchund	1	0	100.0%	100.0%	100.0%	100.0%	100.0%	

Team Leader, Agent and Assessment Performance

The final report will include the connection id detail.

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, Agent and Assessment Performance ⌄]

[Team Leader Performance PDF Report]

Report View:

Team Leader **Cherese Leafe**	Calls	Criteria not met	%Pass	Resolution & Satisfaction	Business Efficiency	Regulatory Compliance	Voice of the Customer	Coaching Status
Agent: Abednego Naidoo								
2001478412K0200420		20-Apr-20	☒	1				
Abednego Naidoo	1	1	0%	0%	100%	100%	100%	0/0
Agent: Ammarah Nair								
1001930218V0200703		3-Jul-20						
1001953184W0200706		7-Jul-20	☒	1				
1001989718W0200706		6-Jul-20						
1001784155V0200702		2-Jul-20						
Ammarah Nair	4	1	75%	100%	75%	100%	100%	0/0
Agent: Anri Louw								
1001266063F0200221		21-Feb-20						
1001158352F0200220		20-Feb-20						
3001641774E0200217		17-Feb-20						
3001563959E0200215		15-Feb-20						
3001105020D0200110		10-Jan-20						
2001893587D0200108		8-Jan-20						
1001864296J0200226		27-Feb-20						
2001398840E0200204		4-Feb-20						
2001308006E0200203		3-Feb-20						
3001038667E0200210		10-Feb-20						
2001414488D0200102		2-Jan-20	☒	1				Dispute Raised
3001911502D0200117		17-Jan-20						
3001790112D0200116		16-Jan-20						
Anri Louw	13	1	92%	100%	92%	100%	100%	0/1
Agent: Anriette Viljoen								
3001928224E0200218		19-Feb-20						
Anriette Viljoen	1	0	100% ☑	100%	100%	100%	100%	0/0
Agent: Byron September								
3001155921E0200211		10-Feb-20						
Byron September	1	0	100% ☑	100%	100%	100%	100%	0/0

Campaign Productivity PDF Report

This report is your assessor productivity report and would be used by the Quality manager to ensure that their QA's are meeting targets.

Campaign Productivity PDF Report

Following report shows productivity, the number of assessments done by Analysts for a selected time period. All campaigns with the same client will be included in the report type Daily Campaign Assessment Distribution.

Please note the sections filter does not apply to this report

*The Report Type Daily Campaign Assessment Distribution only takes in data for the 17 days before the campaign end date **or** if selected in the filter the report will show data for the 17 days before the selected End Date, see filter breadcrumb for dates*

Type:	Assessor Hourly Report ▾	☐ Include all Customer's Campaigns
Targets:	Daily: 0	Assessment Include: Only Successfull ▾
		Productivity PDF Report

Note:

This report is dependent on captured date so make sure you have included it in your date selection. i.e. if your calls were in January but you only assessed or captured them in February you will have to include February in your date filter selection.

Assessor Hourly Report

The default report is an hourly report.

You can set a target if you have one in your department.

By selection *Include all Customer's Campaign*, the data will display all the assessment across the clients db.

By adding a target, the resulting report will be highlighted accordingly, sample below.

The tables are displayed be assessor, per month, per day (rows), per hour (columns).

Please note legend below the table.

Assessor: preshen.naidu@insurance.co.za results for Apr-20
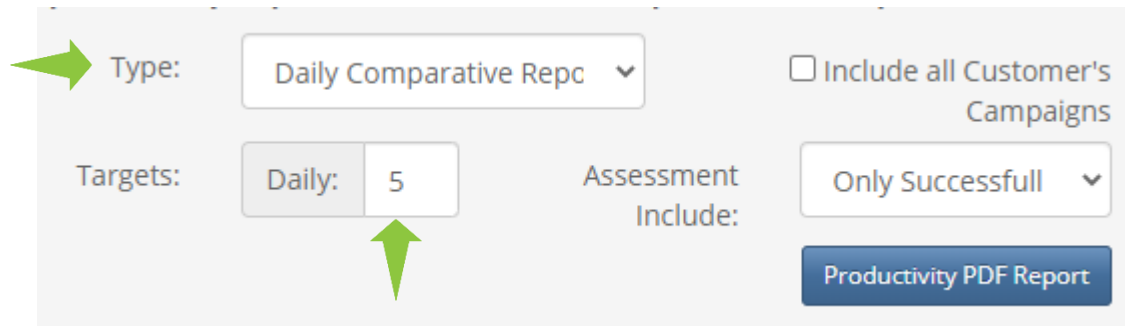
	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	Daily Total
	S	S	S	S	S	S	S	S	S	
06-Apr-20	0	1	1	0	1	0	1	0	0	4
07-Apr-20	0	0	0	0	0	0	2	3	0	5
09-Apr-20	3	0	0	0	6	0	2	0	0	11
14-Apr-20	1	0	4	2	0	1	5	6	3	22
15-Apr-20	1	2	0	0	0	0	0	0	0	3
16-Apr-20	0	2	0	0	4	4	3	0	0	13
17-Apr-20	1	0	0	0	0	0	0	0	0	1
20-Apr-20	0	0	0	0	0	2	0	0	0	2
21-Apr-20	0	0	0	0	0	0	0	0	2	2
22-Apr-20	7	3	0	0	0	0	0	0	0	10
23-Apr-20	3	2	3	5	2	0	0	0	0	15
28-Apr-20	1	2	1	2	0	0	1	3	0	10
29-Apr-20	0	0	0	1	5	6	0	0	0	12
30-Apr-20	0	0	0	0	2	0	0	0	0	2
Total	17	12	9	10	20	13	14	12	5	112

*Note: S - Successful, C - Calibration, P - Problem, A - Absent Capture

This is an assessor productivity report per campaign per month.

Daily Comparative Report

The second report is a daily comparative report.

Here you can compare the productivity of the assessors per day.

Again, you can set a target, which will update the report accordingly.

Assessments for Apr-20	06-Apr-20	07-Apr-20	08-Apr-20	09-Apr-20	14-Apr-20	15-Apr-20	16-Apr-20	17-Apr-20	20-Apr-20	21-Apr-20	22-Apr-20	23-Apr-20	28-Apr-20	29-Apr-20	30-Apr-20	Monthly Total
gomolemo.smouse@insura	2	1	0	0	0	0	0	0	0	0	0	0	0	0	0	3
kerusha.naicker@insuranc	2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2
laetitia.parrot@insurance.c	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3
lebohang.hlongwane@insu	3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3
preshen.naidu@insurance.	4	5	0	11	22	3	13	1	2	2	10	15	10	12	2	112
ruween.deruiter@insuranc	4	2	0	0	0	0	0	0	0	0	0	0	5	5	7	23
sakina.ntuli@insurance.co.	2	4	4	4	12	5	12	1	8	5	12	9	10	10	9	107
sonja.manning@insurance	5	0	0	6	0	0	0	0	0	0	0	0	0	0	0	11
tracey.miller@insurance.co	0	0	0	1	0	0	2	0	0	0	0	0	0	0	0	3
Daily Total :	25	12	4	22	34	8	27	2	10	7	22	24	25	27	18	267

Daily Campaign Assessments Distribution

The last report campaign comparison report with will include all the campaign on that customer without the need to select all campaign as with the previous 2 selections.

This report will only show 17 days of day from the end date you have selected on your filter.

	28/06/2020	29/06/2020	30/06/2020	01/07/2020	02/07/2020	03/07/2020	04/07/2020	05/07/2020	06/07/2020	07/07/2020	08/07/2020	09/07/2020	10/07/2020	11/07/2020	12/07/2020	13/07/2020	14/07/2020	Total
12 Insurance | Collection	0	0	0	11	0	11	0	0	6	5	7	4	0	0	0	0	0	44
13 Insurance | Retentions	0	0	0	12	12	6	0	0	12	14	0	0	0	0	0	0	0	56
2 Insurance | Client Care	0	0	0	0	14	15	0	0	16	16	16	27	0	0	0	0	0	104
3 Insurance | Sales | AQA	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	0	0	0	23	26	32	0	0	34	35	23	31	0	0	0	0	0	204

Call Assessment Distribution PDF 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.

Please note the sections filter does not apply to this report

[Assessment Distribution PDF Report]

This report will display the assessment distribution counts per agent.

Grouped Month. This means and agent could appear in multiple places if they moved within the selected period.

It will show all attempt to assess the agent and categorize the calls as either Successful, Absent and Problem.

| Campaign: | **Insurance \| Client Care \| AQA** | | | |
| Call Date Range: | Monday 06-Jul-2020 to 29-Jul-2020 | | | |

Assessment Period: July 2020

	Successful	Problem	Absent	Total
Abednego Naidoo	8		1	9
Anriette Viljoen	8	1		9
Bella Masekela	8			8
July summary:	24	1	1	26

Coaching Feedback Distribution PDF Report

This report can be used to view the productivity of the team leaders with respect to feedback.

Feedback distribution per agent, per month, per team leader.

The feedback status depend on the site as clients can request addition options depending on how they want to use the app.

The numbers are per unique connection id, this means that if a feedback status has been allocated multiple times on a single connection id it will only count as one.

Example: these entries will only count as 1 as it was done on a single connection id.

Report View

Team Leader: Bradley Carradus

	(No Coaching)	Quality Assessment	Total
Anriette Viljoen	8	0	8
Bella Masekela	8	0	8
Byron September	8	0	8
Emely Mollootimile	1	0	1
Tshepiso Pitso	6	1	7
Total	31	1	32

* Totals are based on distinct Assessment (CapturedID's). Some Assessments may have more then one Feedback Comment logged .

We can read the report below as follows:

Dieago had 5 assessments for January 2020.

4 assessments had no coaching done on them.

1 assessment had 2 coaching feedbacks on it Dispute Raised and Dispute Invalid.

Report View:

Assessment Period: January 2020

Team Leader: Cherese Leafe

	(No Coaching)	Dispute Invalid	Dispute Raised	Total
Dieago Antonio Popple	4	1	1	5
Total	4	1	1	5

* Totals are based on distinct Assessment (CapturedID's). Some Assessments may have more then one Feedback Comment logged .

Campaign Description:	Insurance | Client Care | AQA	**Captured ID:**	2001443619D0200102
Feedback Status:	Dispute Invalid	**Assessment Status:**	Successful Captured
Call Agent Name:	Dieago Antonio Popple	**Assessment Period:**	Jan-20
Assessed on:	Fri - 03 Jan 2020	**Service Line:**	Client Care

[Agent Coaching PDF Report] [View Captured Form] [Send Agent Coaching Report]

Coaching Feedback Details

Date	Classification	Comment	Assessed By
17-Jan-2020	Dispute Raised	Hi T Listened to this call and I completely disagree with the findings: 1. Empathy here is subjective – client called informing that he had no money in his account due to being hijacked in December band them clearing his bank account. Issue was unpaid premium, dealing wit the empathy factor, I don't think it should be categorised under R&S 2. In terms of the premium, client did not query a claim, just the premium, he was informed that we had deducted that morning and it shows successful, that there is nothing we can do at this stage and that he should call us back in a day or two – this is procedure in CC 3. Since when do we tell a client that we will call him once the premium is unsuccessful? Please overturn	cherese.leafe@insurance.co.za
17-Jan-2020	Dispute Invalid	Hi Reese, Empathy - We train and coach that we are human and not robots, the client advised on the hi-jacking and the agent sounded dead and robot like in the sense that he went on to read scripting etc. at no point was there "oh sorry to hear... what happened... glad you are okay..." With regards to the financials, I agree with the auditor that the client said more than once there is no funds in his account, so why inform a client to "wait and see if it goes through and then phone us back" Yes, the system shows successful now and it will change but the client was clear in stating that there is not money so it will bounce, give the client his options, in other words "at the moment you don't have cover, you advised you will only have money on the 15th, which means we will need to arrange a special debit for you which will only cover you from the 15th again. Unfortunately, you will need to give us a call as we can't arrange it for you until the debit has bounced which take 3 to 4 days" No overturn on both parameters	tracey.miller@insurance.co.za

[Add additional feedback Comment »]

Site Overview and Usage PDF report

Like the Campaign Productivity PDF Report this report is dependent on the capture date not the call date.

This report will also include all the campaign on this customer.

Site Overview and Usage PDF Report

Indicates how much the site Is being used by returning the number Of Assessments done, Coaching Sessions completed, Coaching Sessions started, Number Of Agents assessed, Number Of Assessors. Measured against Each calander month per campaign.

Please note the sections filter does not apply to this report

Site Overview PDF Report

This a distribution report per campaign per month which displays counts per assessment, those being assessed, coaching and those assessing.

It should be noted that the Totals are not the accumulative of the table contents.

eg: Look at the last column in the screen shot *Unique Analysts* the total show 5 whereas the sum of the column is 9.

What this means is that there are one or more analysts capturing on multiple campaigns.

Jul-2020	Assessments	Unique Agents	Coaching Started	Coaching Completed	Unique Analysts
Insurance | Brokers | CC	10	10	0	0	1
Insurance | Brokers | Retention	8	8	0	0	1
Insurance | Client Care | AQA	104	41	0	0	3
Insurance | Collections | AQA	44	11	0	0	1
Insurance | QA After Sales	16	4	0	0	1
Insurance | Retentions | AQA	56	27	0	0	2
Total	**238**	**101**	**0**	**0**	**5**

Jun-2020	Assessments	Unique Agents	Coaching Started	Coaching Completed	Unique Analysts
Insurance | Sold Chilli | AQA v1	844	226	0	1	11
Total	**844**	**226**	**0**	**1**	**11**

QA Reports

QA is a bring your own solution.

It allows you to add a traditional QA scorecard with weights to the Genii app.

For detail on the logic please refer to Weighted AQA & QA Logic.docx

There are two reports here which are unique to QA.

Both have *Review* option which will allow you to go to the feedback page.

Agent Detail PDF Report

There are two options on this report.

As with AQA, this is detailed information, per connection id / interaction.

The first will give you only the Section Scores and Overall Assessment Scores.

Section Metric

Agent Detail PDF Report

Following report will list detail Section and Question results for the selected filter criteria:

Report Type: **Section Metric**

Agent Detail PDF Report

Section Metric report			Analytical Quality Assurance
Campaign: QA Campaign			

Agent:	**Charles Chueu**	Team Leader:	Kgomotso Sebata	Review»
Call ID:	0821129865|14Apr2021|16:57	Analyst: Call Date:	lynn@geniianalytics.com 1-May-21	(102222)

1	Compliance		100 %	
2	Business Process		88 %	
3	Rejection Process Motor / Non Motor		100 %	
		Assessment Percentage:	95%	Weighting: 100.00

Agent:	**Charles Chueu**	Team Leader:	Lesego Gaangkomo	Review»
Call ID:	0821131294|15Apr2021|15:22	Analyst: Call Date:	lynn@geniianalytics.com 2-May-21	(102223)

1	Compliance		100 %	
2	Business Process		88 %	
3	Rejection Process Motor / Non Motor		100 %	
		Assessment Percentage:	95%	Weighting: 100.00

Agent:	**Colette Mtshweni**	Team Leader:	Mantwa Masondo	Review»
Call ID:	0821131648|26Apr2021|11:56	Analyst: Call Date:	lynn@geniianalytics.com 3-May-21	(102224)

1	Compliance		0 %	
2	Business Process		63 %	
3	Rejection Process Motor / Non Motor		100 %	
		Assessment Percentage:	45%	Weighting: 100.00

Section and Question Metrics

The second one will give you your question weights and scores.

Agent Detail PDF Report

Following report will list detail Section and Question results for the selected filter criteria:

Report Type: Section and Question Metrics ⌄

Agent Detail PDF Report

Campaign: QA Campaign

Agent:	**Colette Mtshweni**		Team Leader:	Mantwa Masondo			Review»
Call ID:	0821131648|26Apr2021|11:56		Analyst:	lynn@geniianalytics.com			(102224)
			Call Date:	3-May-21			

1	Compliance		Weight	Score			
1.01	Advise that calls are recorded at the beginning of the call		10	0	CFS		
1.02	If an item needs to be removed or amendments made to the		10	10.00			
1.03	Rejection letter sent to the customer with PDF and correct letter		10	0	CFS		
1.04	Rejection letter attached on TIA		10	10.00			
	Current Rolling Score:	0.00	Section Percent:	0% ☒		Assessment Impact:	20.00

2	Business Process		Weight	Score		
2.01	Greeting		5	5.00		
2.02	Provide the customer with status updates as per agreed frequency (48hrs) incl		5	0		
2.03	Do you think the customer understood the reason for rejection?		5	5.00		
2.04	Is the customer clear about the next steps that the financer will take?		5	0		
2.05	Was the objection process explained to the client?		5	5.00		
2.06	Did the agent use plain language?		5	5.00		
2.07	Rejection discussed with customer telephonically same day as claim rejection		5	0		
2.08	Was correct information provided to the customer?		5	5.00		
	Current Rolling Score:	25.00	Section Percent:	63%	Assessment Impact:	25.00

3	Rejection Process Motor / Non Motor		Weight	Score		
3.01	Was objections made by the customer handled appropriately		10	10.00		
3.02	Detailed and accurate notes captured on event notepad		10	10.00		
	Current Rolling Score:	45.00	Section Percent:	100%	Assessment Impact:	20.00
			Assessment Percentage:	45%	Weighting:	100.00

Assessment Impact – Applied Weight of Section (will make up the numerator)

Weighting – Applicable Weight of Assessment (denominator)

Performance Tracker

This report will give you a summary report on a section level.

The following reports are also available on QA reporting and are identical to those found on AQA reporting:

Campaign Productivity PDF Report

Call Assessment Distribution PDF Report

Coaching Feedback Distribution PDF Report

Site Overview and Usage PDF Report

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