**Genii Analytics | Dynamic Filters | User Guide**

V4. 21 Jul-20

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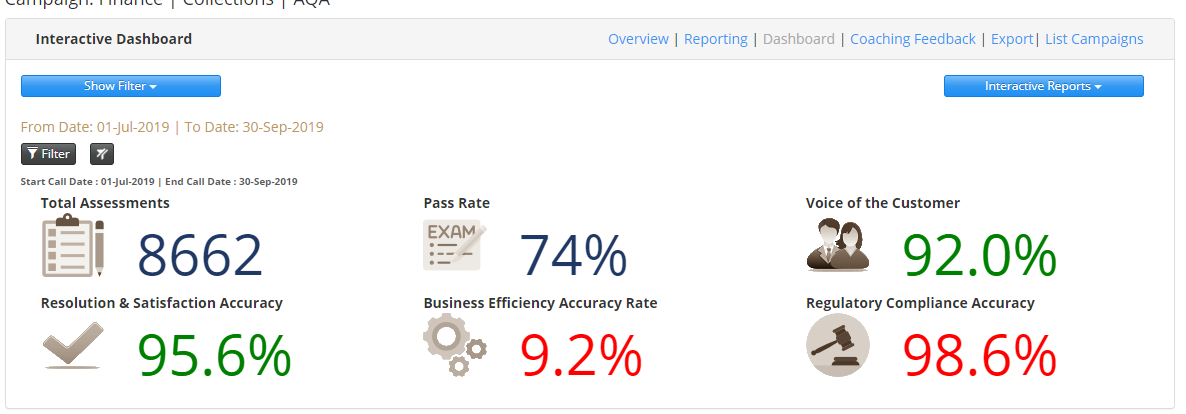
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# Dynamic Filter | Interactive Reports | Dashboard

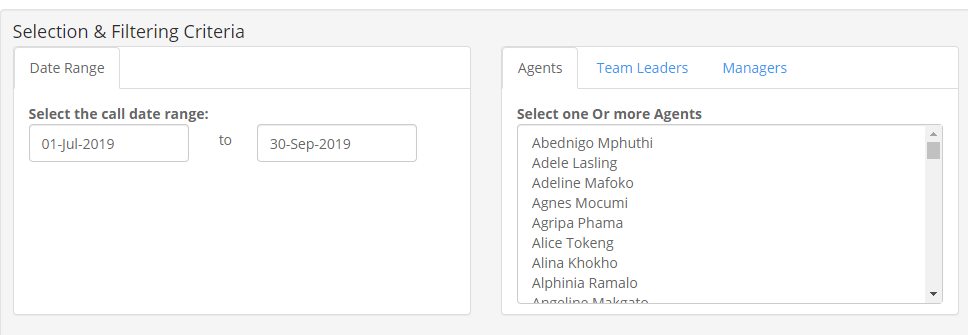
The current/previous dashboard has a default setting as follows:

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 were N/A was selected for all sections.



Currently you can filter as follows:

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

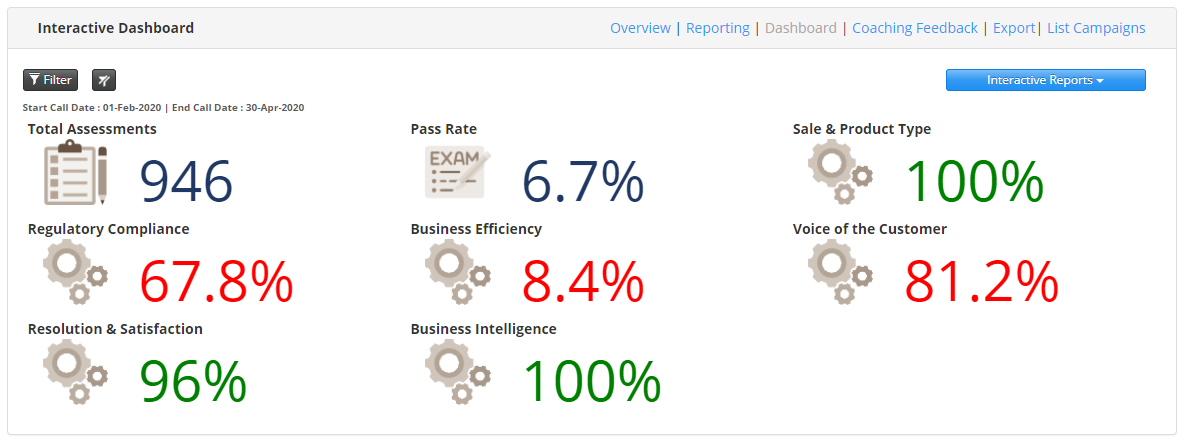


The New Dynamic filter will default as follows:

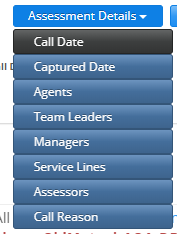
1. All section data will default to both downstream (agent) controllable and upstream (business) non controllable failures.
2. All section data (excluding BI allocated sections) will display (not only the top 4).

It will display in the order that it appears on your campaign form.

1. Pass Rate will now include both downstream and upstream failures.
2. Total Assessments will include all successful assessments (passed and failed), including assessments were N/A was selected for all sections.
3. 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

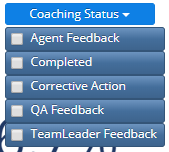
**Control Types:**

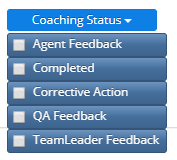
1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

**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.

1. 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.

1. 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.
2. Sentiment for Section Scores

Negative = Failures/Assessment  
Positive = 1 - (Failures/Assessments)

1. The Dashboard will not work without section targets\*

# Dynamic Filter | Interactive Reports | Performance Tracker

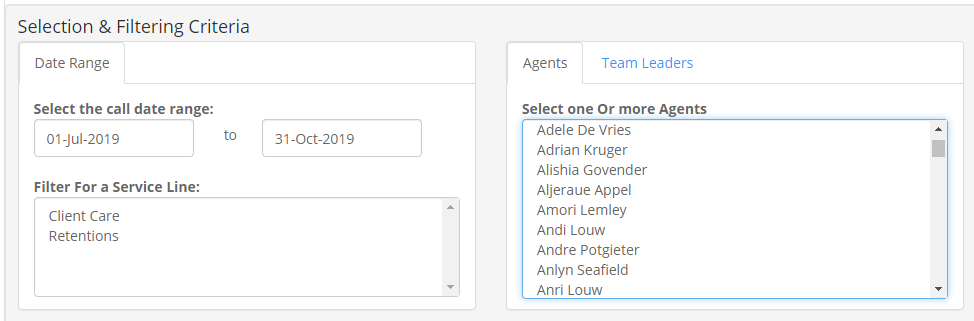
The Performance Tracker has a default setting as follows:

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



Currently you can filter as follows:

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



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 were 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

**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

***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.

1. Only the date filter will affect the other filters.

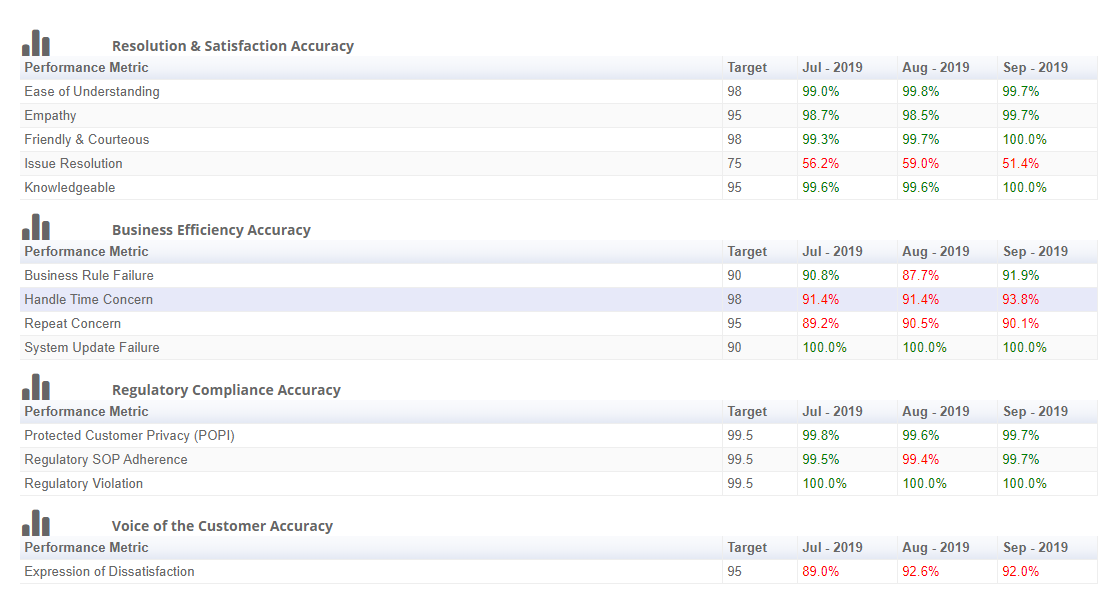
ie: This means if you select a date range that excludes a specific agent, that agent will not be on your filter list. However, if you select a specific Team Leader, all agents will still display

1. 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

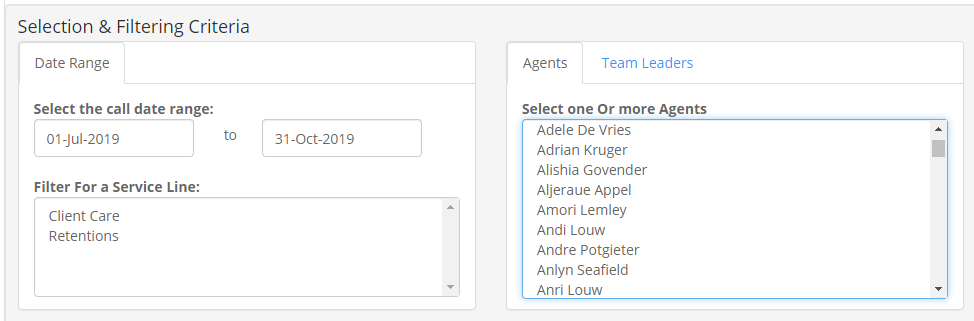
The Performance Metric has a current default setting as follows:

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.



Currently you can filter as follows:

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



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.
5. All Sections will be displayed not just the top 4. Resolution & Solution, Business Efficiency, Regulatory Compliance and Voice of the Customer.
6. You will now be able to compare weeks or months.
7. As before your end data selections determines the data set shown.
8. 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:**

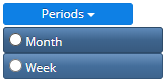
1. Downstream (Agent controllable)
2. Upstream (Business controllable)
3. Add Insights (Business Intelligence)

**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

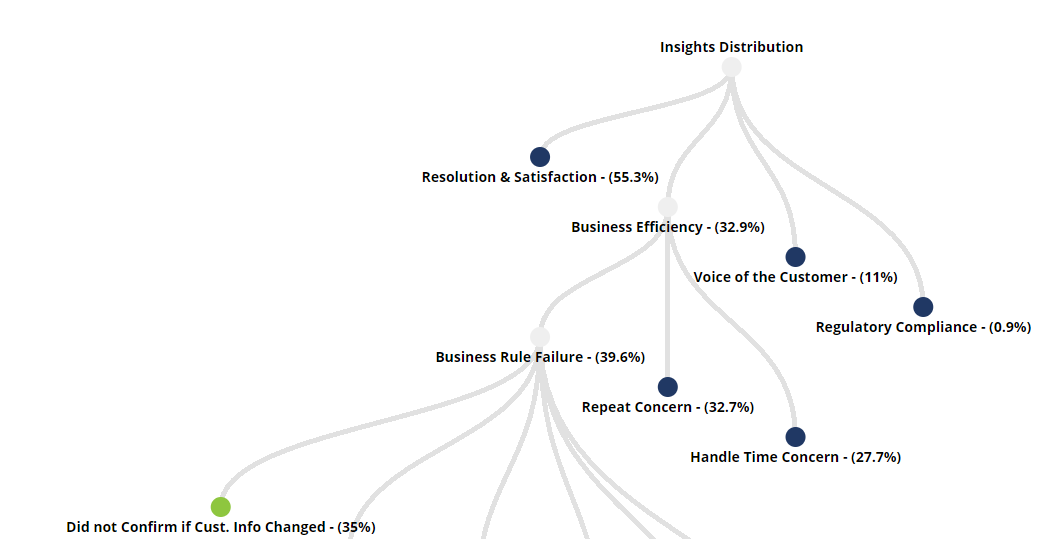
 **Period:**

1. Month
2. Week

# Dynamic Filter | Interactive Reports | Performance Root Cause Analysis

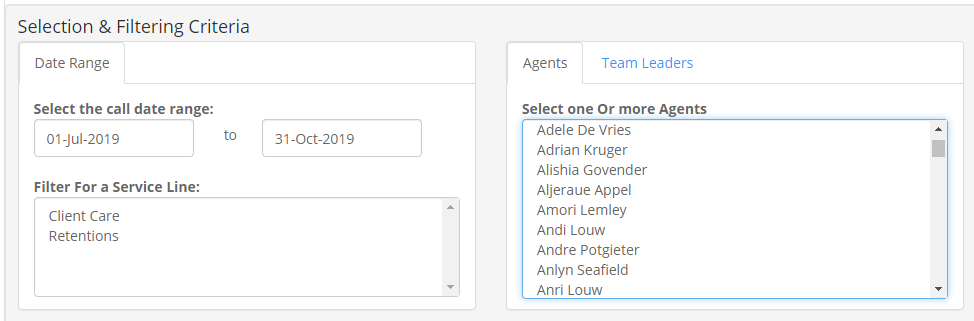
The Performance Root Cause Analysis has a current default setting as follows:

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



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)

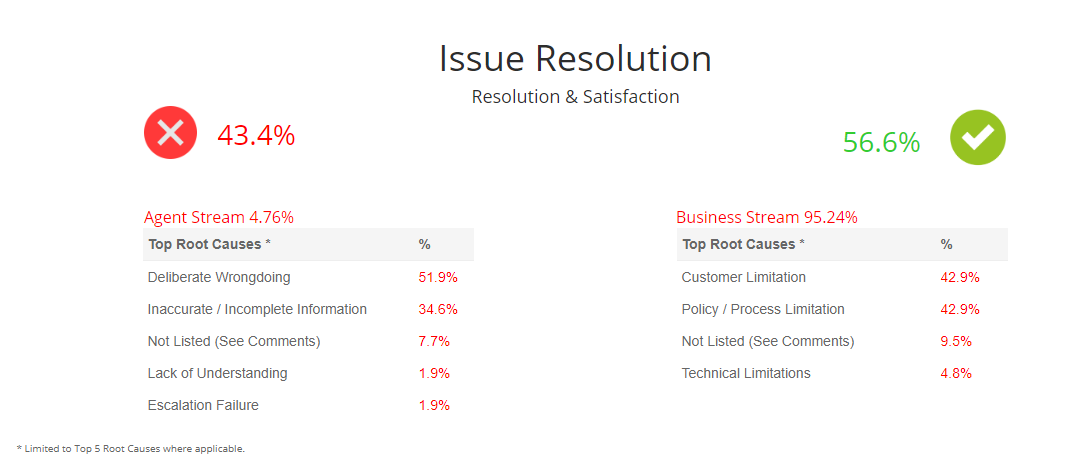
The example below shows

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

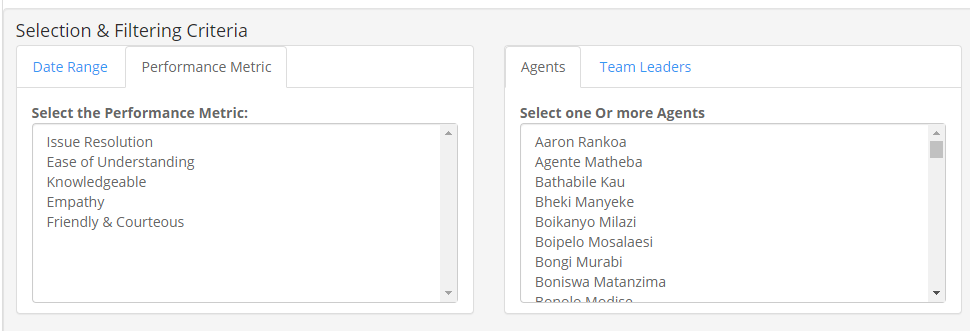
The Performance Metric Drilldown has a current default setting as follows:

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



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

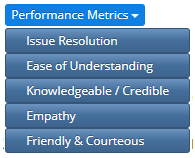
**Coaching Status:**

(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)

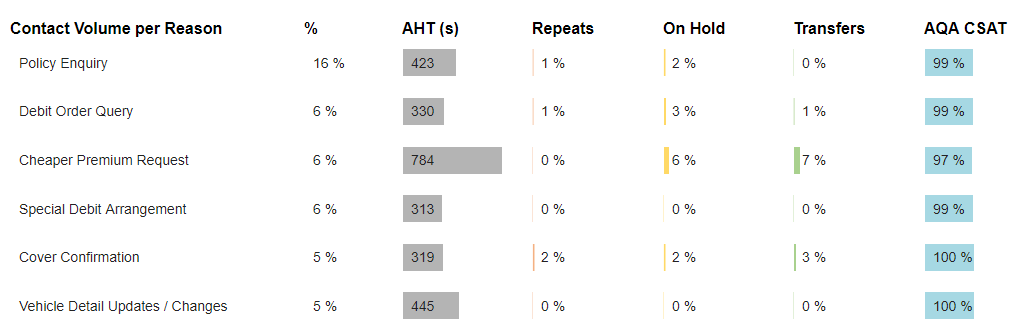
The example below shows

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

# Dynamic Filter | Interactive Reports | Contact Disposition Matrix

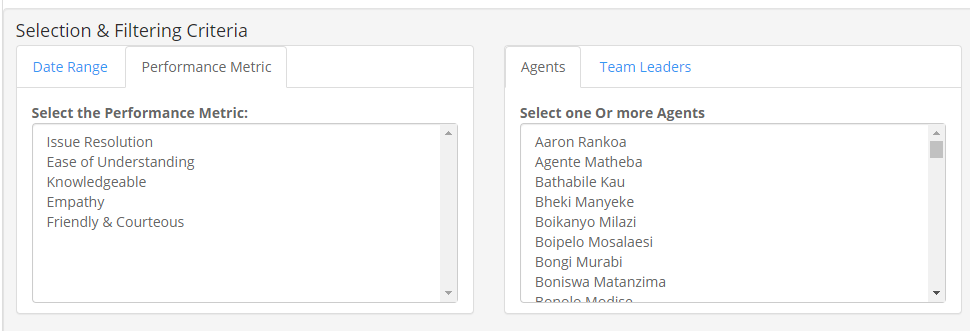
The Contact Disposition Matrix has a current default setting as follows:

1. Displays Call Reason distribution percentage, along with the associated Call Drive Matrix items. (Campaign dependant)
   1. FCR (first call resolution)
   2. SCR (Sales/Collections/Retention)
   3. AHT (Average Handling Time)
   4. Average Hold Time
   5. Average Transfers
   6. AQA CSAT
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.



Currently you can filter as follows (campaign dependant):

1. Call Date
2. Call Driver Matrix items
3. Service Line
4. Agent
5. Team Leader
6. Manager



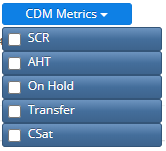
The New Dynamic filter will default as follows:

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

**CDM Metrics:**

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

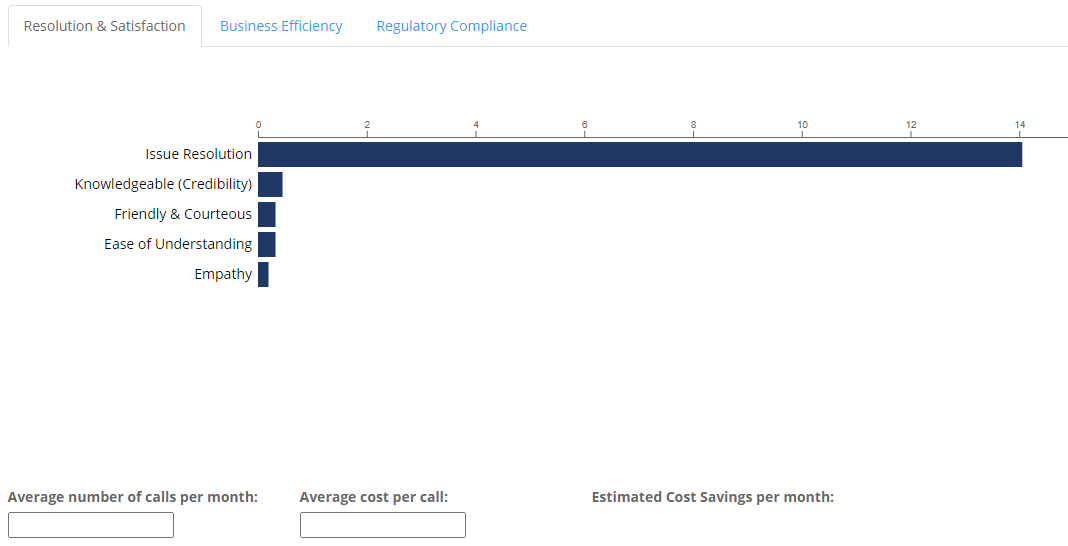
**Coaching Status:**

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

# Dynamic Filter | Interactive Reports | Lift Opportunities

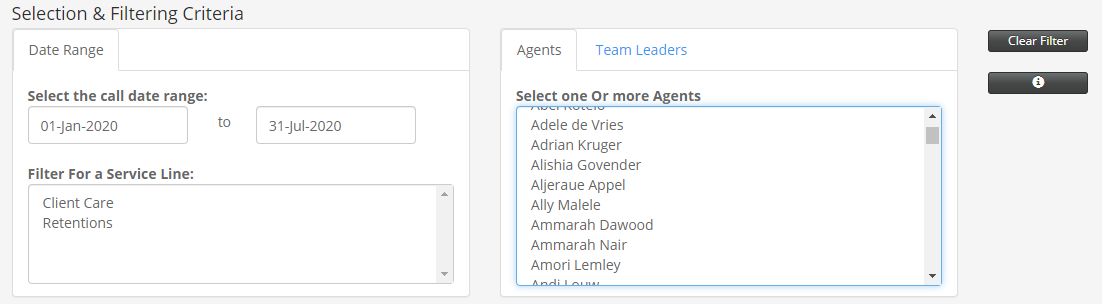
The Lift Opportunities has a current default setting as follows:

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)

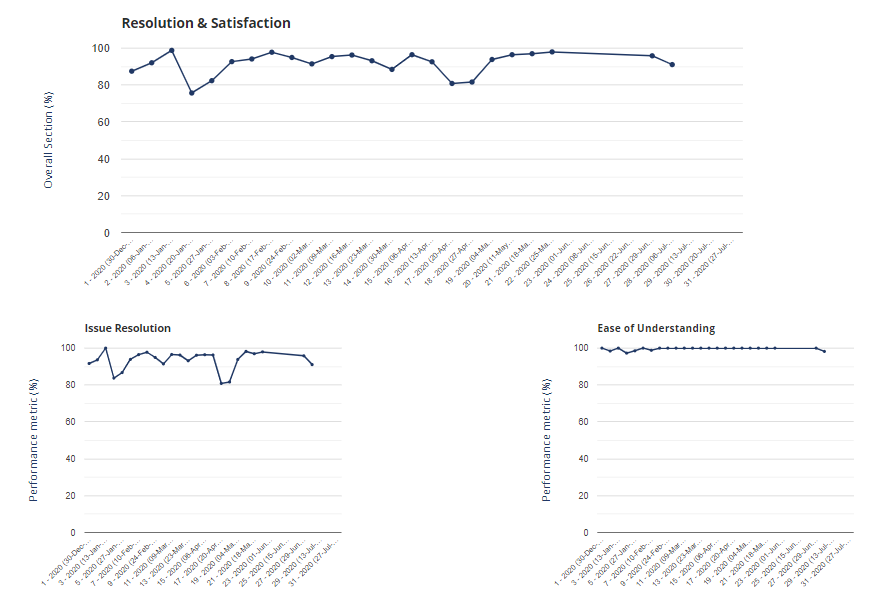
**Coaching Status:**

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

# Dynamic Filter | Interactive Reports | Trending

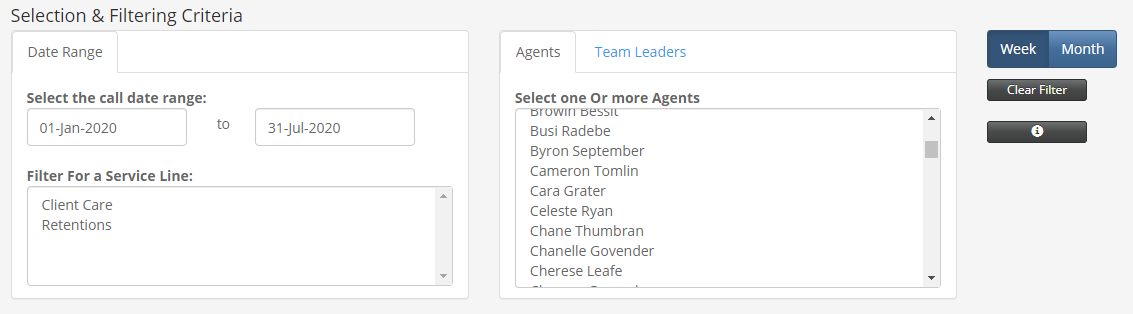
Trending has a current default setting as follows:

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)

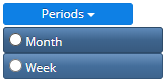
**Assessment details:**

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)

**Period:**

1. Month
2. Week

**Coaching Status:**

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