**Genii Analytics | General | Information Guide**

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# Lists

When updating any list in the list management or Form Wizard feature the following need to be taken into consideration.

1. Each List box will only accommodate 8 000 characters, this includes any commas, spaces, carriage returns and special characters.

If your list has a greater character count, you can add another list box with the same name.

1. Semi-Colons (;) are the standard delimiter in these fields, however the following will also act as a delimiter so ensure that it is not part of your list items.

Comma (,)

Colon (:)

# Calculations

Sentiment (set in the Section Portion of the Questions)

Failures – where the greater than sign (>) is allocated to an assessment.

1. Negative = Failures / Total Assessments
2. Positive = 1- (Failures / Total Assessments)

# General

1. When doing a capture:

When adding a number greater than four characters to the any comment box, the number will be replaced with XXXX.

This is to ensure that no contact numbers or account numbers are saved as per legislative.

Only the System reference box is exempt from this validation.

1. Coach Status: coaching completed vs coaching started
2. Character length for comment box

System ref: 250

Comment box: 990

List box: 8000

1. If the following is entered < *TEXT* > into any comment box and error will occur.
2. Hold for UserDefined04 should be entered in the following format to ensure that it displays on CDM mm:ss (01:23) or m:ss (1:23).
3. For CSAT your section must be name *Voice of the Customer* to display on CDM.
4. SMART & Weighted AQA - Assessment Target – what weight (score) needs to be achieved to pass the assessment. Assessment Scope
5. SMART & AQA – Pass Target – the % Assessments that have reached the Assessment Target. Campaign Scope.
6. Your first Comment Box should always be named *Summary of Interaction:* or the comments will not show up on Root Cause analysis.
7. Assessor Efficiency Percentage = Interaction duration / Action duration

Action Duration = Submit Assessment time – Start Assessment time

Interaction Duration = Time added to the as the duration of the call on the Call Details page (The length of the call)

1. CDM only shows the top 15 call reasons.
2. When you assign a user to a customer only the campaigns in RUN status will be available on the Assessment Capture Form page

Comparing Views



The dashboard indicates the accuracy by section, i.e. total number of passes without fail by section, the calculations will be as follows:

|  |  |  |
| --- | --- | --- |
| **Section:** | **Calculation:** | **Comments:** |
| Resolution & Satisfaction | # of evaluations with no RESOLUTION & SATISFACTION errors / total # of evaluations | This is the score for the section only |
| Business Efficiency | # of evaluations with no BUSINESS EFFICIENCY errors / total # of evaluations | This is the score for the section only |
| Regulatory Compliance | # of evaluations with no REGULATORY COMPLIANCE errors / total # of evaluations | This is the score for the section only |
| Voice of the Customer | # of evaluations with no VOICE OF THE CUSTOMER errors / total # of evaluations | This is the score for the section only |
| Pass Rate | # of evaluations with no ERRORS / total # of evaluations | This is for the overall evaluation |

The Root Cause tree is independent from Accuracy measures. The Root Cause tree is a distribution of failures or insights.

The best would always be to filter by Performance Metrics Sections or BI, so in the example below, first filter just for Resolution & Satisfaction, Business Efficiency, Regulatory Compliance & Voice of the Customer. Once filtered this will show you the section with the biggest failure rate, i.e. using the example below, (and hypothetically if Business Intelligences was not included), 45% of failures were identified in the Business Efficiency section. So basically it is saying if there are 200 assessments, and of those 200 assessments, 120 were failures and 80 were passes, it would only look at the 120 failures and shows you how those 120 failures are distributed. This is done to indicate where the biggest opportunity is to improve results. So technically yes, if the Pass Rate is 2% then the Insights Distribution shows you the 98% of failures as a distribution of a 100% across all the sections.

