**Genii Analytics | Weighted AQA and QA**

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| 1.0 | 2021/05/01 | L Petersen | Initial doc. |
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# Purpose

This document is to provide detail on how the calculations and logic is set up for both these products.

Please note both product calculations will default to Controllable failures unless you have made other selections.

This means, Uncontrollable failures on default reports will not affect weighting.

# Creating a Weighted Scorecard

## Weighted AQA

You will use the same method to create a weighted AQA scorecard as a Standard AQA score card with the following exception.

You will select Weighted AQA as your Campaign Product.

You will have access to the same templates as Standard AQA, which will allow you to easily adapt any clients’ current AQA scorecard to Weighed AQA.

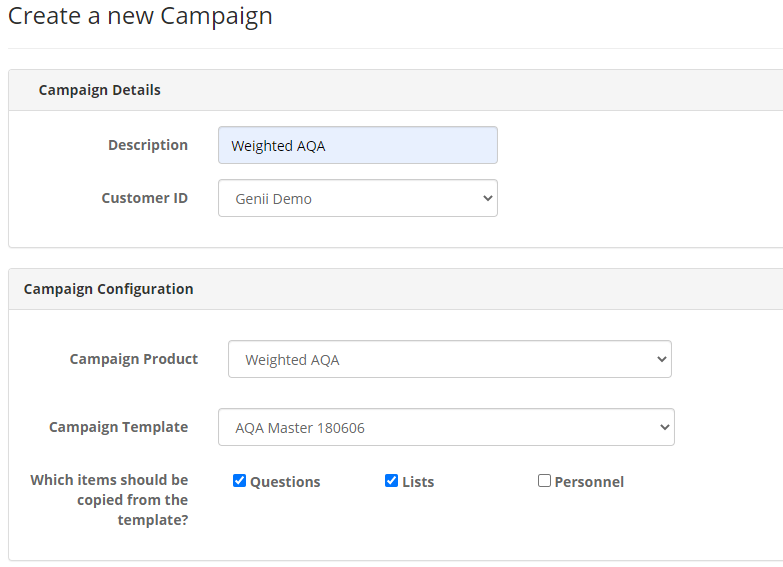


Figure :Create Weighted AQA

## QA

Here you will select QA as your Campaign Product.

As QA is generally a Bring Your Own Scorecard, you will use the Blank Campaign as your Campaign Template.

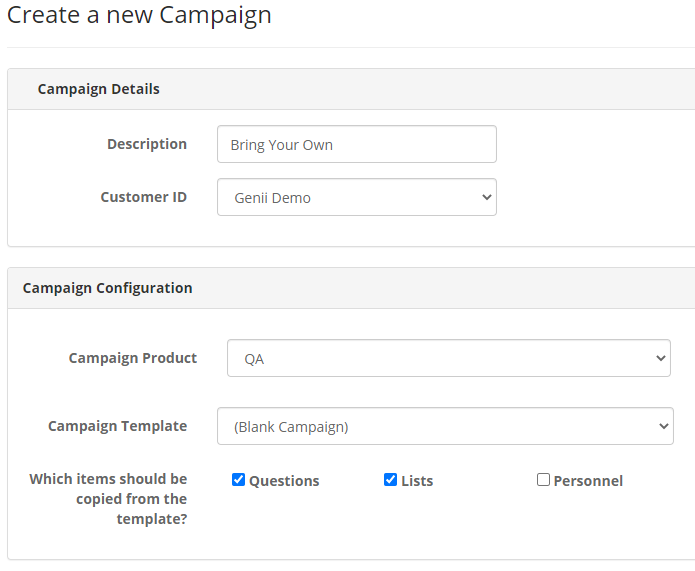


Figure :Create QA

As these are Weighted products, I would recommend setting the Assessment and Pass Target to allow the reporting to have the most impact.

You will find this input on the Edit Campaign page.

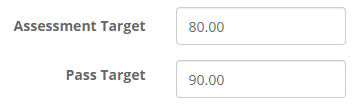


Figure :Targets

What is the difference:

Assessment Target –The weight (score) that needs to be achieved to pass a single assessment. Generally, the sum of the weights allocated. Assessment Scope. Please note this is only for weighted products. Standard AQA is hard set to 100%.

Pass Target – The Percentage (%) of Assessments that have achieved the Assessment Target. This will affect Standard AQA visualization as well. Campaign Scope.

It is important to note the differences between these products:

1. QA is what most call centres are familiar with.

Its limitation is that it targets only the agent and so provides a one-sided story of your centre’s issues.

On the app we do limit you to a 2-tier structure.

1. Weighted AQA allows you to view your centres’ s issues holistically while still being able to score your agents with a familiar method.

It allows you to tackle both business and agent failures at a root cause level.

# Set Weights

Weights are set on either:

1. Section - Level 1 questions (the total will then be evenly distributed to all level 2 questions) or
2. Output Metrics – Level 2 questions (the sum of all level 2 questions will become the section total)

Examples for AQA

Sections: Resolution & Satisfaction, Business Efficiency, Regulatory Compliance and Voice of the Customer

Output Metrics: Issue Resolution, Ease of Understanding, Handled Interaction Efficiently, Repeat concern and Expression of Dissatisfaction.

Examples for QA

Section: Opening, Compliance and Closing

Output Metrics (which will be actual questions): Did the agent advise the caller that the call is being recorded at the beginning of the call, Did the agent greet and introduce themselves and the company? and Did the agent use plain language?

## Set Weight on Section level

To set weights on the Section level you will add a weight at this level.

The weight will be evenly distributed between the Output Metrics (second level questions) in that section.



Figure :Set Section Target

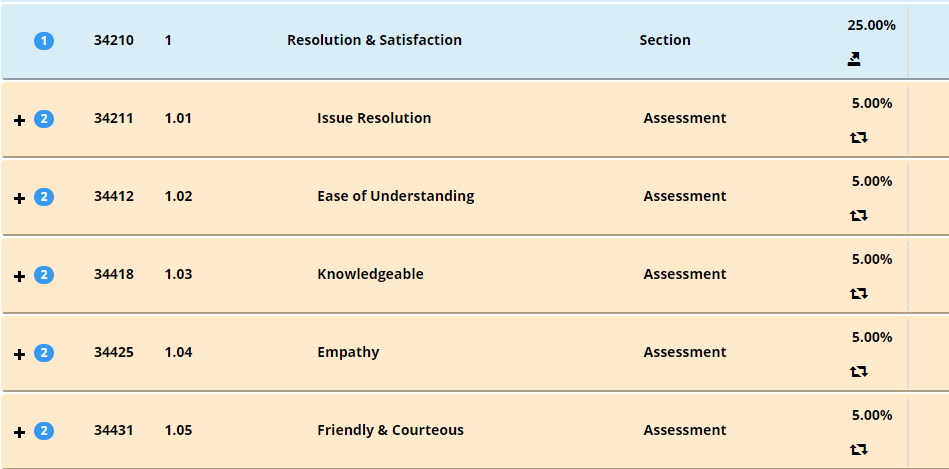


Figure :Set Section Target Results

The icons indicate, immediately, what kind of distribution was allocated, and each has a hover definition for quick reference.



Figure :Section Weighted Icon



Figure :Equal Distribution icon

## Set Weight on Output Metric level

To set the weights on the Output Metric Level you will need to engage the Auto Calculate Weight option on the Section question.



Figure :Section View of Set Output Metric Target

You will then add a weight to each individual Output Metric.

The sum of the individual Output Metric weights will become the Section Weight.





Figure :Set Output Metric Target

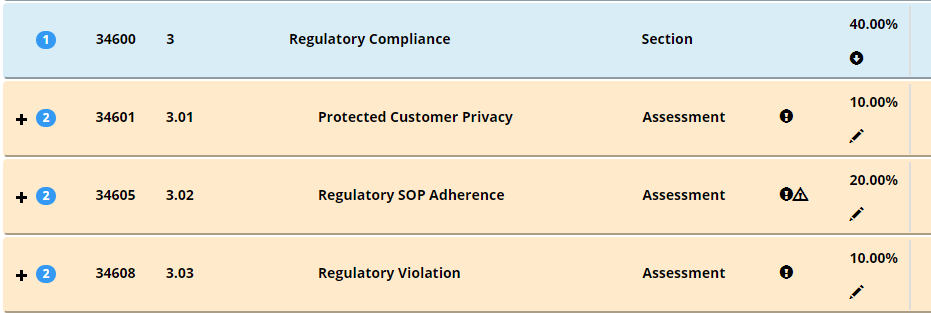


Figure :Set Output Metric Target Results



Figure :Auto Calculate Icon



Figure :Editable Weight Icon

# Critical Failures

Critical Failures are set on the output metric (level 2) questions.

They can be added to weighted and zero weighted questions.

There are 3 types of failures that can be applied.

1. Section – This will reduce the applicable section score to zero.
2. Assessment – This will reduce the assessment score to zero.
3. Section and Assessment – this will reduce the applicable section score to zero and the assessment score to zero.

Although the last failure may seem strange, this is done so that you can view different aspects of the business on different reports.



Figure :Section Critical Failure



Figure :Assessment Critical Failure

Where both are side by side it indicates a Section and Assessment Failure



Figure :Assessment & Section Critical Failure

# Historical Data

It should be noted that weights can be updated/amended, by adding questions to the scorecards, or redistributing weights across questions.

Adjusted weights WILL NOT change historical data.

All historical data will retain the weights and scores allocated at the time of capture.

Critical Failure changes WILL affect historical data.

If a critical failure type is added or removed from any question this will result in all historical data changing accordingly.

# Terminology

Weight – this is the point value that is assigned to a question.

Applicable weight – sum of the weights of applicable questions answers (where the questions are not answered N/A). The Denominator

Applied weight – sum of the weights of the answered questions that passed. The Numerator

Single Assessment Calculation

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Output Metric/Section | Weight | Results | Applied  Weight # | Applicable Weight $ | Score |
| Issue Resolution | 5 | Uncontrollable Failure | 5 | 5 | 100% |
| Ease of Understanding | 5 | N/A | 0 | 0 | -- |
| Knowledge & Credibility | 5 | Controllable Failure | 0 | 5 | 0% |
| Empathy | 5 | Controllable Failure | 0 | 5 | 0% |
| Friendly & Courteous | 5 | Pass | 5 | 5 | 100% |
| Resolution & Satisfaction | 25 |  | 10 | 20 | 50.0% |
| Handled Interaction Efficiently | 7.5 | Pass | 7.5 | 7.5 | 100% |
| Repeat Occurred | 7.5 | Pass | 7.5 | 7.5 | 100% |
| Business Rule Failure | 7.5 | Pass | 7.5 | 7.5 | 100% |
| System Update Failure | 7.5 | Pass | 7.5 | 7.5 | 100% |
| Business Efficiency | 30 |  | 30 | 30 | 100.0% |
| Protected Customer Privacy | 10 | Pass | 10 | 10 | 100% |
| Regulatory SOP Adherence | 20 | Pass | 20 | 20 | 100% |
| Regulatory Violation | 10 | Pass | 10 | 10 | 100% |
| Regulatory Compliance | 40 |  | 40 | 40 | 100.0% |
| Voice of the Customer | 5 | Pass | 5 | 5 |  |
| Expression of Dissatisfaction | 5 |  | 5 | 5 | 100.0% |
| Assessment Total | 100 |  | 85 | 95 | 89.5% |

Table :Single Assessment Calculation

Score = The Numerator (#) / The Denominator ($)

Assessment Score = 85/95 = 89.5 %

Resolution and Satisfaction Section score = 10/20 = 50%

# Answers

Although the greater than sign ‘>’ is used as the indicator in both AQA and QA, it produces different results.

In AQA the > sign indicates a failure.

In QA the > sign indicates a pass.

You have the option of using binary answers, namely Yes or No, as well as Multiple answers like NPS score, namely Promoter, Neutral and Detractor or 0 – 10 scores.

## N/A Answers

If you elect to use N/A as answer option, you will have to note the following.

N/A counts as neither a pass nor fail unless it is allocated a greater than sign.

In calculations N/A (without a greater than sign) will act as follows

1. Reduce the denominator score by the question’s associated weight.

Scenario:

If you have 10 questions with 10% weight each and you pass 9 and 1 is N/A your total weight is 90% but your score is 100%

We measure the capture form as a score card with a total of 100, we see this as a score.

If the assessor gives an assessment a N/A answer with the clauses specified above. The score total will become 90.

Thus, the calculation will look like as follows [Applied weight]/[Applicable weight] \* 100.

This calculation will be represented as follows 90/90\*100 = 100%

Where the first 90 is the score and the second 90 is the total thus the assessments will still score 100%.

N/A can be a pass for QA (if > is added) but can never be a failure as the code excludes it.

# Calculations

*Multiple assessments*

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Output Metric/Section | Critical Failures | Weights | Call 1 | Call 2 | Call 3 | Call 4 | Call 5 | Call 6 | Call 7 | Overall  Score |
| Issue Resolution |  | 5 | ✕ | ✓ | ✓ | 🚫 | ✓ | ✓ | ✓ | 80% |
| Ease of Understanding |  | 5 | ✓ | 🚫 | 🚫 | 🚫 | ✓ | ✓ | ✕ | 75% |
| Knowledge & Credibility |  | 5 | ✓ | ✕ | 🚫 | 🚫 | ✓ | ✓ | ✓ | 80% |
| Empathy |  | 5 | ✓ | ✕ | 🚫 | 🚫 | ✓ | ✓ | ✓ | 80% |
| Friendly & Courteous |  | 5 | ✓ | ✓ | 🚫 | 🚫 | ✓ | ✓ | ✓ | 100% |
| Resolution & Satisfaction |  | 25 | 80% | 50% |  |  | 100% | 100% | 80% | 82.0% |
| Handled Interaction Efficiently |  | 7.5 | ✓ | ✓ | ✕ | 🚫 | ✓ | ✓ | ✕ | 67% |
| Repeat Occurred |  | 7.5 | ✓ | ✓ | ✓ | 🚫 | ✓ | ✓ | ✓ | 100% |
| Business Rule Failure |  | 7.5 | ✓ | ✓ | ✓ | 🚫 | ✓ | ✓ | ✓ | 100% |
| System Update Failure |  | 7.5 | ✓ | ✓ | ✓ | 🚫 | ✓ | ✓ | ✓ | 100% |
| Business Efficiency |  | 30 | 100% | 100% | 75% |  | 100% | 100% | 75% | 91.7% |
| Protected Customer Privacy | Section | 10 | 🚫 | ✓ | ✕ | 🚫 | ✓ | ✕ | ✓ | 60% |
| Regulatory SOP Adherence | Section & Assessment | 20 | 🚫 | ✓ | ✓ | 🚫 | ✓ | ✕ | ✕ | 60% |
| Regulatory Violation | Section | 10 | 🚫 | ✓ | ✕ | 🚫 | ✓ | ✕ | ✓ | 60% |
| Regulatory Compliance |  | 40 |  | 100% | 0% |  | 100% | 0% | 0% | 40.0% |
| Expression of Dissatisfaction |  | 5 | ✓ | ✓ | ✓ | 🚫 | ✓ | ✕ | ✓ | 83% |
| Voice of the Customer |  | 5 | 100% | 100% | 100% |  | 100% | 0% | 100% | 83.3% |
| Average Score |  | 100 | 91.7% | 89.5% | 36.7% |  | 100.0% | 0.0% | 0.0% | 53.0% |

Table :Multiple Assessments Calculations

|  |  |
| --- | --- |
| Legend | |
| ✓ | Pass |
| ✕ | Controllable Failure |
| 🚫 | N/A |

These calculations and rules apply to both products.

The table above provides examples of how the assessment calculations are done.

It includes section and output metric scores, as well as average and overall scores.

It also includes critical failures questions and how they affect scoring.

See additional scenarios mentioned highlighted in N/A answers, call 4 has only N/A answers. This call will only be included in the total assessments and will not form part of any calculations.

The same logic will apply where all answers for a section are N/A.

That section score for that assessment will show as ‘--' and will not be included in the total assessment denominator.

Example:

Protected Customer Privacy (Output Overall Score) =

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Call 1 | Call 2 | Call 3 | Call 4 | Call 5 | Call 6 | Call 7 | Scores |
| Applied Weight # | -- | 10 | 0 | -- | 10 | 0 | 10 | 30 |
| Applicable Weight $ | -- | 10 | 10 | -- | 10 | 10 | 10 | 50 |
| Output Metric Score |  | 100% | 0% |  | 100% | 0% | 100% | 60% |

Table :Protected Customer Privacy Calculation

Regulatory Compliance (Section Overall Score) =

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Call 1 | Call 2 | Call 3 | Call 4 | Call 5 | Call 6 | Call 7 | Scores |
| Applied Weight # | -- | 40 | 0 | -- | 40 | 0 | 0 | 80 |
| Applicable Weight $ | -- | 40 | 40 | -- | 40 | 40 | 40 | 200 |
| Section Score |  | 100% | 0% |  | 100% | 0% | 0% | 40% |

Table :Regulatory Compliance Calculation

*Note: Critical Failure is applied to the section.*

Average Scores =

Sum of applied weights # / Sum of applicable weights $

Therefore, as shown in *Table 2*:

Call 1

Sum of applied weights = 55

Sum of applicable weights = 60

Call 1 Average Score = 55/60 = 91.7%

# Weighted AQA Reporting

Currently only the interactive reports will display weighted AQA logic.

PDF Reporting and Export csv are only AQA logic until further notice.

There are reports that will not be affected by the weighted AQA logic.

The table below indicates which reports will have both and which will only have AQA Logic.

Note: Default stream – Controllable

|  |  |  |
| --- | --- | --- |
| Reports | AQA Logic | Weighted AQA Logic |
| Dashboard | x | x |
| Performance Metric Drilldown | x |  |
| Trending | x | x |
| Performance Metric Results | x | x |
| Gauge Performance Metric Results | x |  |
| Calibration Assessor Summary | x |  |
| Contact Disposition Matrix | x |  |
| Root Cause Analysis | x |  |
| Lift Opportunities | x |  |
| Performance Tracker | x | x |

Table :AQA Reporting

On each of these reports you will now find another filter option – Reporting Logic.

By default, these reports will display Weighted AQA logic, but will also allow you to view the same data with standard AQA logic applied.

You will also be able to view the result with or without the critical failures.

For Performance Metric and Trending Output metric results, Critical Failures are not implemented. This is viewing these scores from a business perspective and target centre improvement areas.

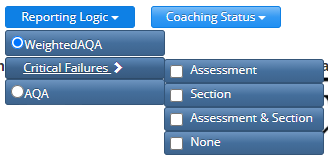


Figure :Filter Options

# QA Reporting

QA reporting is available on PDF reporting, Interactive Reporting and Exporting.

Export csv will remain as normal as this is a straight data extract.

It is limited to the following reports.

Note: Default stream – Controllable

|  |  |  |
| --- | --- | --- |
| Interactive | PDF Reporting | Export |
| Dashboard | Agent Detail PDF Report | List of Assessments with Additional Commentary |
| Performance Metric Results | Performance Tracker | List of Assessments with Output Metrics |
| Performance Tracker | Call Assessment Distribution PDF Report | List of Assessments with Root Causes |
| Contact Disposition Matrix | Coaching Feedback Distribution PDF Report | List of Assessments with Coaching Feedback Comments |
| Gauge Performance Metric Results |  | List of Assessments with Audit Details |
| Calibration Assessor Summary |  | Daily User Activity |

Table :QA Reporting

# Icons Definitions

*Icons viewable on Question Wizard*

|  |  |
| --- | --- |
|  | Non-controllable, Upstream |
|  | Agent Controllable, Downstream |
|  | Auto Calculated Weight based on the sum of children questions. |
|  | Section Weighting is equally divided among the number of children questions. |
| Pencil with solid fill | Weighting can be edited and will influence the weighting of the section. |
| Icon  Description automatically generated | Weighting calculated from parent questions and sibling questions. |
| Badge Follow with solid fill | Additional Insights (Weighted AQA only) |
| Icon  Description automatically generated | Critical Failure, Assessment Failure |
| Exclamation Mark Interjection Punctuation, PNG, 980x982px, Exclamation  Mark, Black And White, Check Mark, Full Stop, Interjection | Critical Failure, Section Failure |

Table :Icons Descriptions