

Chime Score Performance System - Consultant Quick Start Guide

The Chime Score Performance System is a core platform to inform, align, engage and develop Chime employees. It's easy to use and has a range of great features to help you succeed at Chime and beyond! This guide is intended to help you become familiar with the Chime Score system and become proficient in its basic operation.

System Login



Username:

Password:

☐ Remember me

Login

When you login for the first time (simply enter the user name and password into the appropriate fields as shown in the screen shot above), you will be prompted to change the default password (typically **P@ssw0rd**) to one of your own (remember it or store it somewhere safe for future reference should you forget it).

At some point during or near the end of training, you should have received a user name and a default password to access Chime Score. A special url has been set up for you to access Chime Score -

<https://chime.acuityapm.com>

Please Change Your Password

Your password needs to be changed.

Current Password:

Use at least 8 characters and at least 1 number.

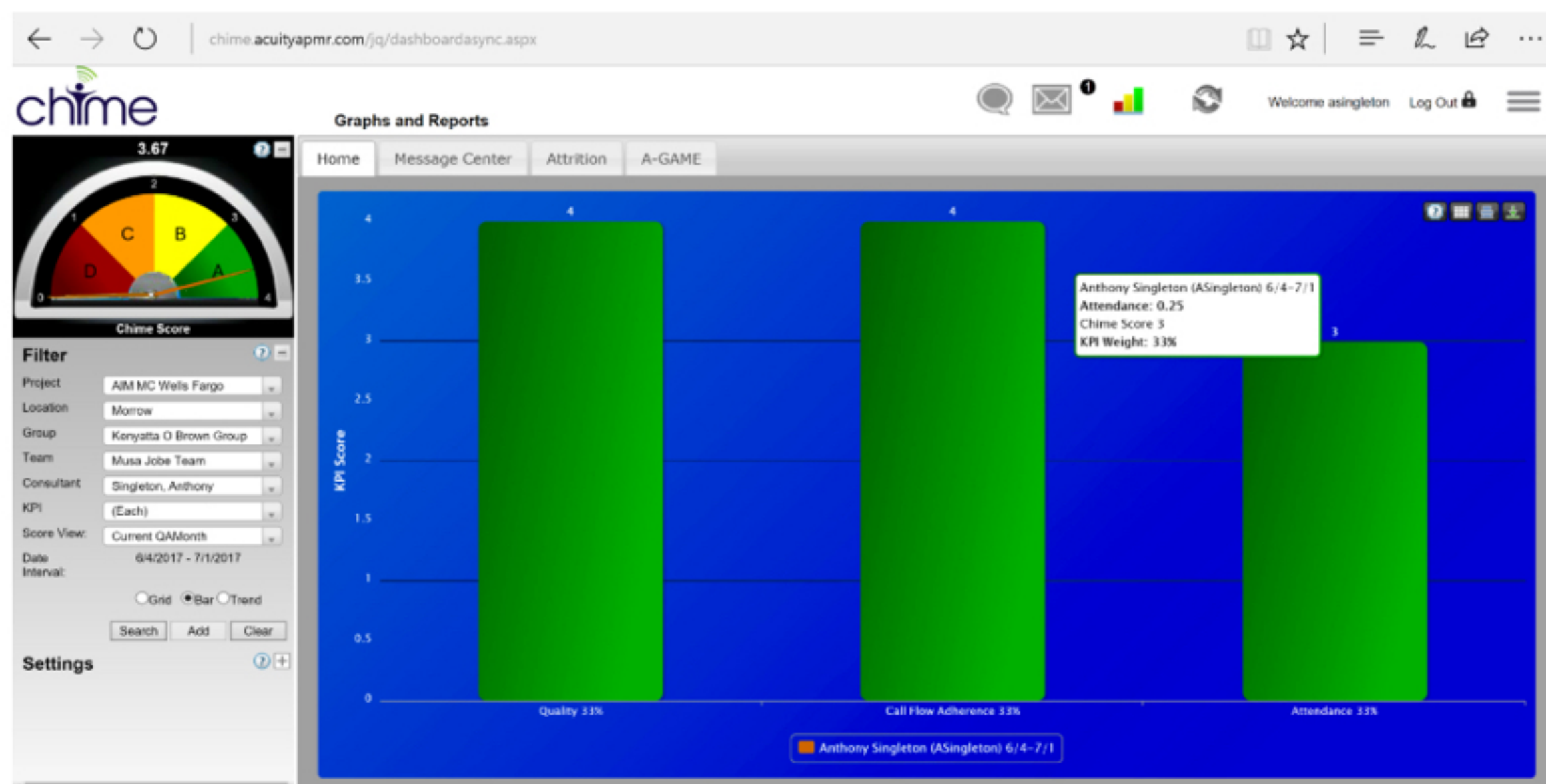
New Password:

Confirm New Password:

Submit Change

Dashboard Basics

Once logged in to Chime Score, a dashboard will display your performance scores (Chime-based and/or values of the underlying, aka "Raw" data).



The number on the top of the gauge in the upper left section of the filter panel indicates your current Chime Score (refreshed at least daily). The gauge is divided into color-coded performance levels and scoring resets with the start of each QA Month or other logical basis.

Each KPI for which you are responsible, and that make up the overall Chime Score, is displayed so that you can quickly and easily monitor progress and pinpoint your strengths and areas that require improvement.

The weight (or relative importance) for each KPI comprising the overall Chime Score is included in the label underneath the bar and positioning the cursor over the bar will also display KPI details.

Communications and Support



If your supervisor has not reached out to you to assist with a weak Key Performance Indicator, reach out to them by using the **Chat** feature accessible at the top of Chime Score.



- 1 Communication may also be facilitated via Chime Score's conventional **Messaging** feature accessible via the envelope icon. A round marker next to the envelope icon will indicate when a new message has been received.



The Chime Score Notifier is a small "floating" (meaning it can be moved or positioned anywhere on the desktop) tool bar that keeps you connected when your Chime Score dashboard isn't displayed on your desktop. Notification of New Messages and other information will be displayed here and clicking the available buttons will launch the relevant module within Chime Score.

Chime Score Notifier is a "tray application" and requires that you provide login credentials (same as for Chime Score) to enable.

Credentials

Customer Prefix:

Username:

Password:

Login

Filters and Views

3.67

Chime Score

Filter

Project

AIM MC Wells Fargo

Location

Motrow

Group

Kenyatta O Brown Group

Team

Musa Jobe Team

Consultant

Singleton, Anthony

KPI

(Each)

Score View:

Current QAMonth

Date

6/4/2017 - 7/1/2017

Interval:

☐ Grid

☒ Bar

☐ Trend

Search

Add

Clear

Filters located in Chime Score's left panel - enabled or disabled based on role - determine what information is displayed in the main report window.

To isolate a specific KPI, use the **KPI** filter. To view historical performance, select a previous date range from the **Score View** filter.

TIP: after selecting filters, click the **Search** button to run the new or modify the existing report.

To view historical trends of overall Chime or KPI-specific score, click **Trend** and set the desired beginning and end dates using the slider.

KPI

(All)

Trend By:

QAMonth

Date Range:

1/1/2017 - 7/1/2017

☐ Grid

☒ Bar

☐ Trend

Search

Add

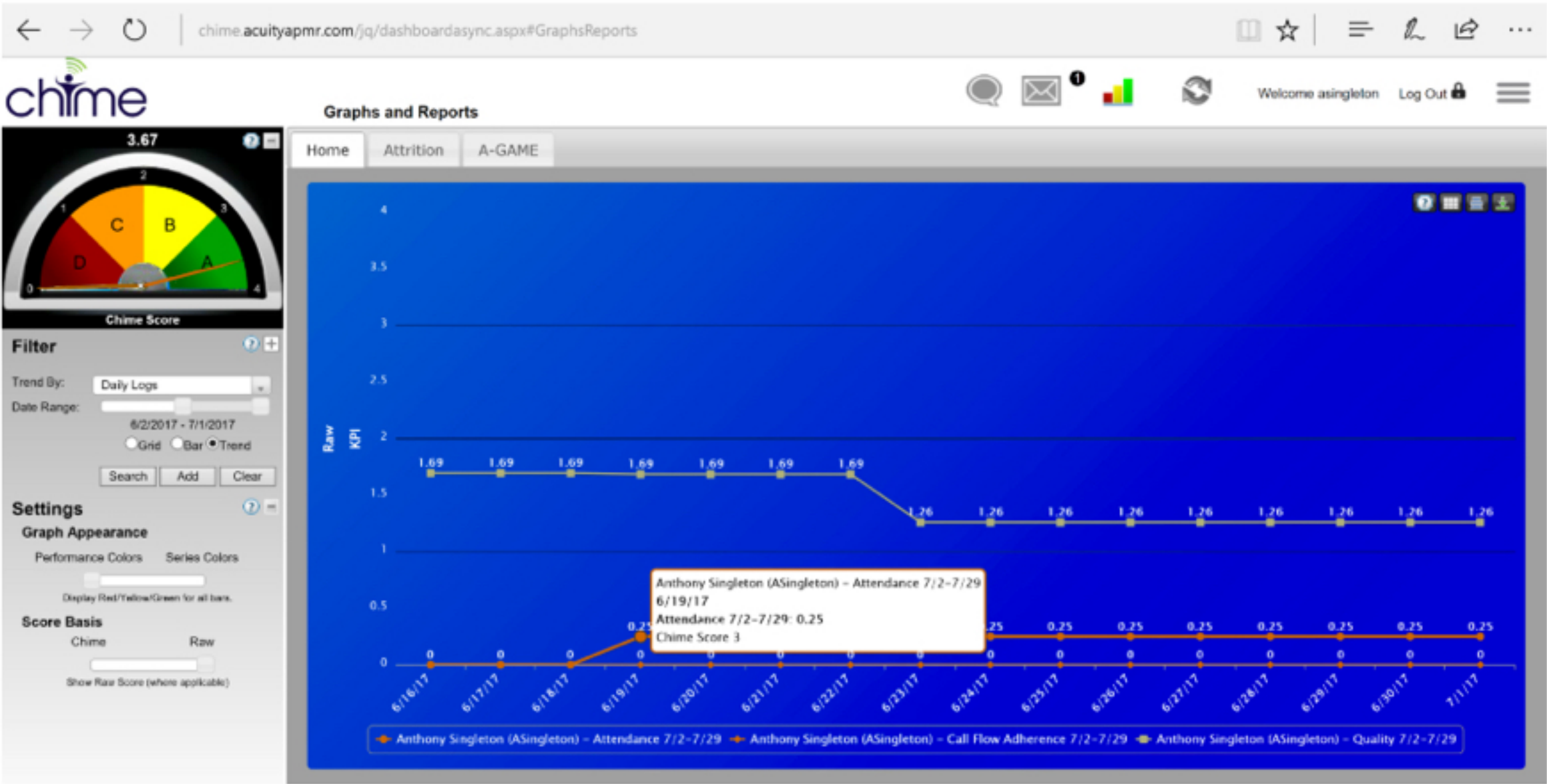
Clear

Slide left/right

to select a range of dates for the

trend report.

Performance Trend Report



Tabular or "Spreadsheet" Views

Prefer a tabular view of the data? Select the **Grid** button and click Search. Or click on a specific KPI bar in the Bar view to invoke a spreadsheet style report.

Graphs and Reports

Home Table - Anthony Singleton (ASingleton) 6/4-7/1 - Quality Message Center Attrition A-GAME

History

Date	Project	Location	Group	Team	Name	KPI	Score	Raw
06/04/2017	A/M MC Wells Fargo	Morrow	Kenyatta O Brown Group	Musa Jobe Team	Singleton, Anthony	Quality 33%	4.00	1.26%

CSV TXT Page 1 of 1 View 1 - 1 of 1

Record Data Sources

QAPivot.WellsFargo

Agent	Opps	M	C	U	Y	N	NA	Defects	Defect %
ASingleton	238	119		1	116	10	26	3	0.012605042017

Page 1 of 1 View 1 -

Report Settings

Chime Score Settings allow you to change the report display appearance. **Performance Colors** reflect KPI performance as calibrated to Chime Score target levels (A/B/C...). The **Series Colors** options apply a distinct color to each KPI bar.

The **Score Basis** setting allows you to view overall Chime Score or specific KPI values as either Chime "calibrated" scores or Raw data values.

Settings

Graph Appearance

Performance Colors Series Colors

Display Red/Yellow/Green for all bars.

Score Basis

Chime Raw

Show Raw Score (where applicable)

Sidekick - Digital Ally for the Frontline Superhero

Sidekick is an intelligent system for coaching, recognition, review, and performance management integrated with the Acuity contact center performance management platform.

Using Sidekick is Easy...

1. Log into Acuity.
2. **Select** an **agent** from the CSR (or similar label) drop down.
3. Click **Sidekick** from the menu and it will load in the context of the selected agent.



The Sidekick Journal

The Sidekick Journal provides a place to document all of the interactions, such as coaching, recognition, monitors, goal-setting, etc., between team leaders (aka supervisors, etc.) and their agents. Adding journaling to your regular frontline management routine will ensure that you never have to guess with whom or in what ways you've lead and developed your team. The Journal is your reliable digital system of record.

Using the Journal is easy. By default, journal entries are listed in table format by Entry Date (most recent on top). Columns are sortable so that this view can be adjusted as desired.

Journal Add New Record						
User	Date	Delivered By	Reason	Date Closed	Follow Up Date	
KAmador	03/04/2019	GL	Coaching	3/4/2019	3/29/2019	
KAmador	03/11/2019	GL	Call Monitor			
KAmador	04/10/2019	GL	Coaching	4/17/2019	4/17/2019	
KAmador	04/18/2019	GL	Recognition			
KAmador	05/24/2019	GL	Recognition	5/24/2019	5/31/2019	

Adding a Journal Entry

As you prepare to initiate a coaching session or other form of support interaction with an agent, click the blue **Add New Record** button located in the top right corner of the Journal.

Journal Entry for **frdavis**

Entry Date: 05/30/2019

Delivered By: Smith, Jason

Reason: Recognition 2

Details/Issues

Franklin Davis did great this quarter, and met all Q2 goals that he needed to improve on.

Resolution/Follow-up

Q3 goals have been discussed, and will follow up mid way.

Set Goal

KPI: Quality (Chat)

Units

Standard 5

Current Value

60

% Increase

5

Goal

65.00

When: 05/30/2019

Follow-Up: Yes 5

6/19/2019

Date Closed

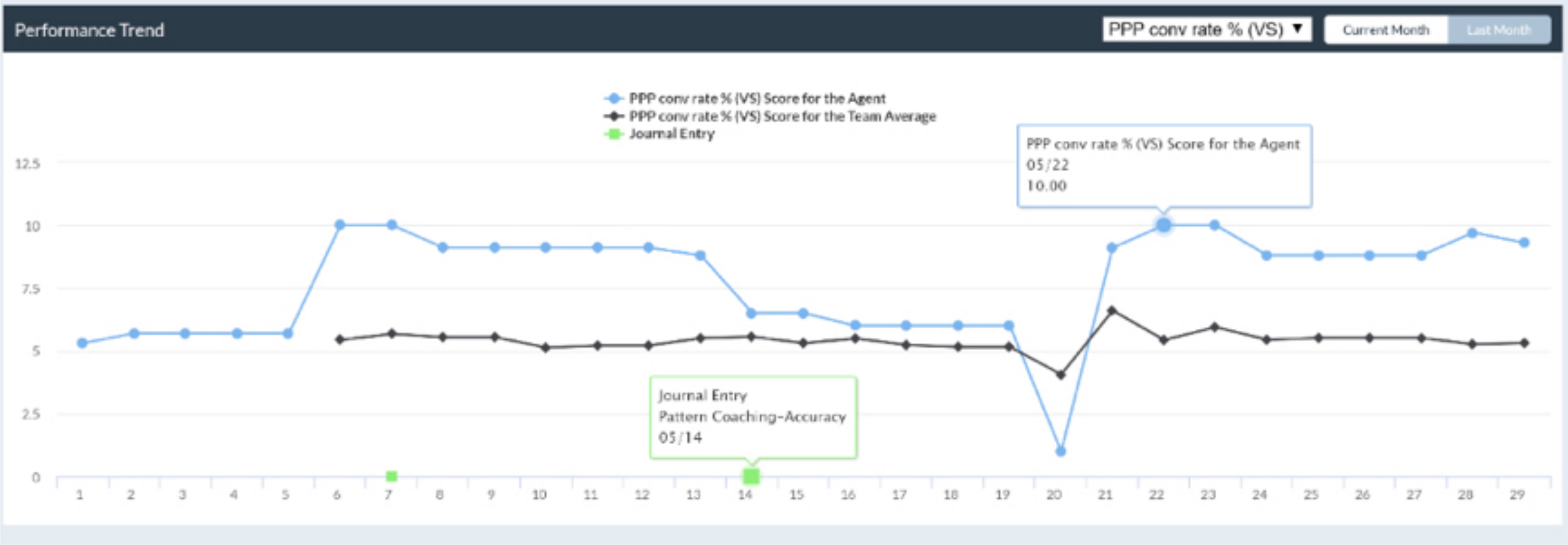
8/1/2019

Submit

1. Fill in the **Entry Date** (current or past) and Delivered By fields.
2. Select a **Reason** or Category of support type: **Coaching**, **Recognition**, **Goal-setting**, and **Call Monitor** are defaults, but other options may be presented.
3. Enter notes/comments in the **Details/Issues** and **Resolution/Follow-up** fields to adequately document the support activity.
4. If applicable, specify details for performance Goals in the **Set Goal** section per the relevant KPI and a date for **Follow-up**.
5. Once the form is complete, click the **Submit** button and the new entry will appear in the Journal table.

Performance Trend

The Performance Trend displays the day-by-day performance scores by Balanced Score or specific KPI for either the Current or Last Month. The Performance Trend view also includes all of the journal entries recorded that same month. In this way, it's easy to visualize the impact of your agent support activities. Trend lines display performance for the focus agent as well as the team average. Mouse-over the dots on the black or blue trend lines will display details about the KPI or Balanced Score. Mouse-over the green dots on the x axis will display the summary for the Journal entry. Clicking the green dot will open the full Journal entry.

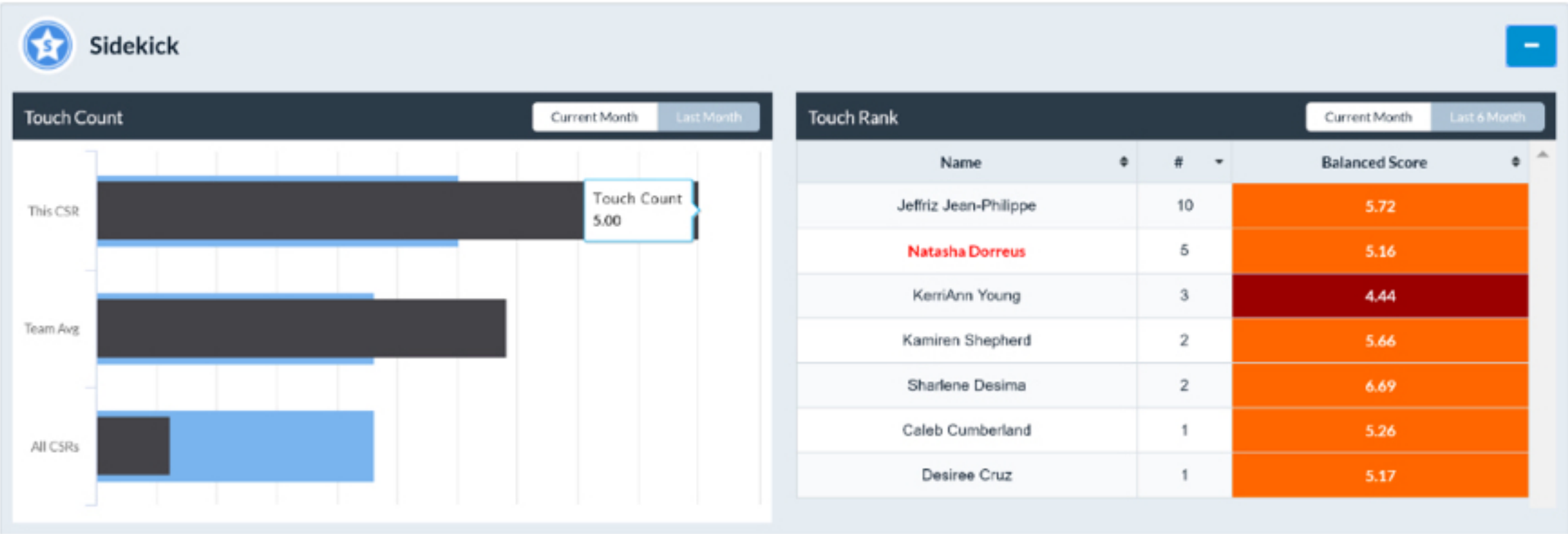


Touch Count / Touch Rank

Touch Count

Touch Count and Touch Rank reports provide context about the frequency of your interactions with agents and how this routine correlates with performance. Touch Rank looks at three data points:

- 1. **This CSR:** Mouse-over the black bar shows the number of interactions ("touches") with the focus agent in the current month. Mouse-over the blue bar shows the average number of touches for the focus agent up to the past six months.
- 2. **Team Average:** Mouse-over the black bar shows the average number of interactions ("touches") across all agents on the team. Mouse-over the blue bar shows the average number of touches across all agents on the focus team for up to the past six months.
- 3. **All CSRs:** Functions just like Team and This CSR, but across all CSRs within the same department, program, or other comparable group.

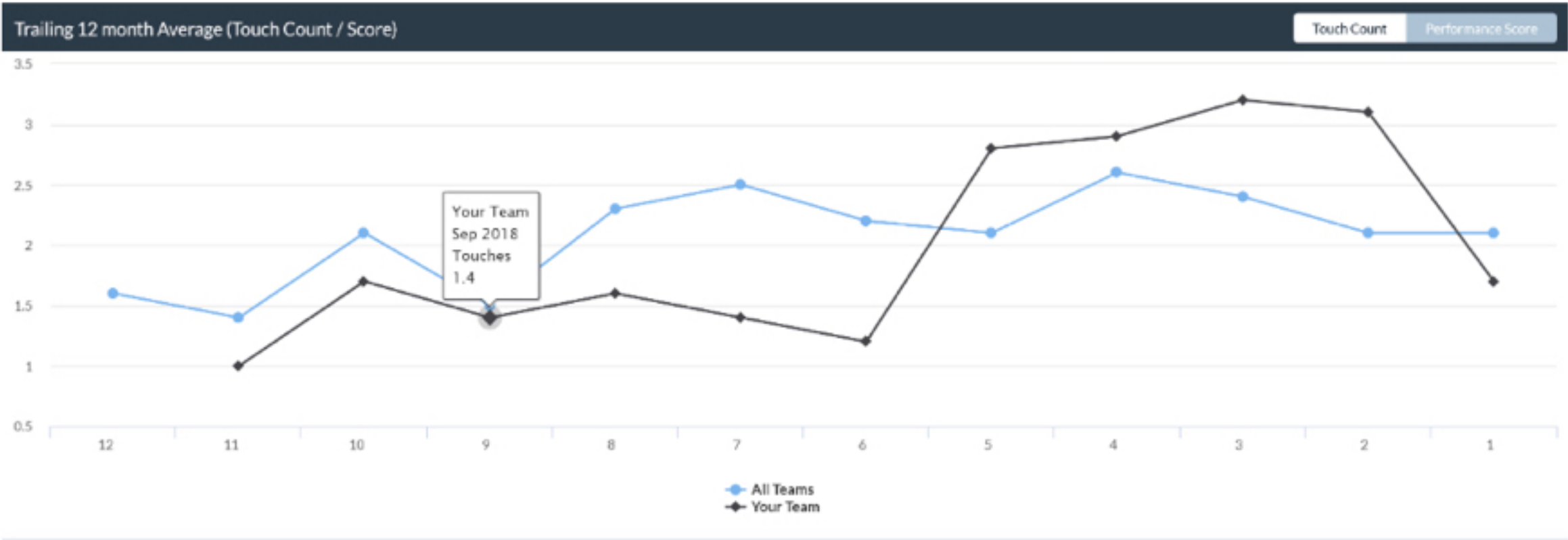


Touch Rank

Touch Rank displays the number of "touches" and Balanced Score for each of the agents on the specified team. The focus agent is highlighted in red. The second column shows the number of touches (supervisor/team lead support interactions). The third column displays the Balanced Score (total performance score reflective of all weighted KPIs). Each column can be sorted to customize the view or be adjusted by Current and Last Month.

Trailing Twelve Month (TTM) Average - Touch Count/Performance Trend

The Trailing Twelve Month trend chart displays the average Touch Count per agent over the most recent 12 month period. The black line reflects the focus team and the blue line reflects the average across all teams performing the same or similar function. The view can be adjusted to display the Trailing Twelve Month Performance Score (Balanced Score) for the focus (Your) or All Teams using the toggle switch at the top right corner of the chart.



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