

# Acuity Performance Management System - Quick Start Guide

Acuity is designed to inform, align, engage and develop agents, managers and other employees. It's easy to use and has a range of great features to help you succeed! This guide will help you become familiar with the 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 Acuity. A special url has been set up for you to access Acuity -

<https://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 Acuity, a dashboard will display your performance scores (actual data values as well as corresponding performance scores and levels).





The number on the top of the gauge in the upper left section of the filter panel indicates your current overall aka "balanced score" (refreshed at least daily). The gauge is divided into color-coded performance levels and scoring resets with the start of each pay period or other defined basis.

Each KPI for which you are responsible, and that make up the balanced 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 is included in the label underneath the bar and positioning the cursor over the bar will also display KPI details.

## Sub-KPI Drill-Down

Double-clicking a specific KPI will either render a tabular view of the underlying data or display the sub-KPIs (aka KPI split) that comprise the primary KPI (see screen shot below), enabling the specific area of weakness to be pinpointed with deep granularity.



## 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 Acuity.



1 Communication may also be facilitated via Acuity'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 Acuity Notifier is a small "floating" (meaning it can be moved or positioned anywhere on the desktop) tool bar that keeps you connected when your Acuity dashboard isn't open 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 Acuity.



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



Acuity Credentials

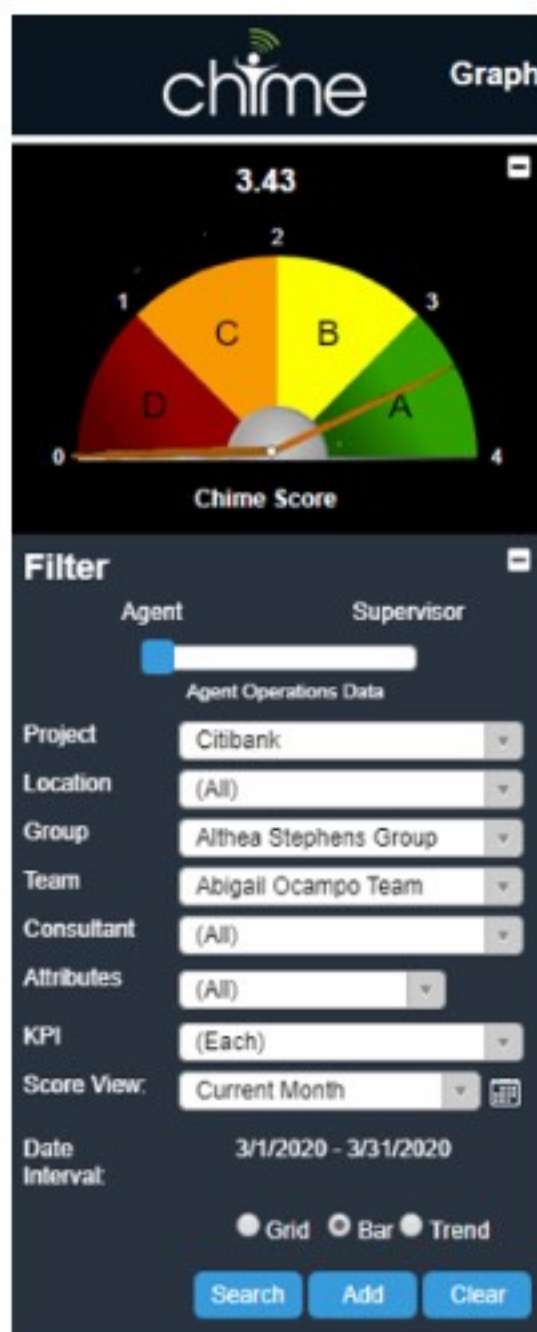
Customer Prefix: COX

Username: gsalvato

Password: [REDACTED]

Login

## Filters and Views



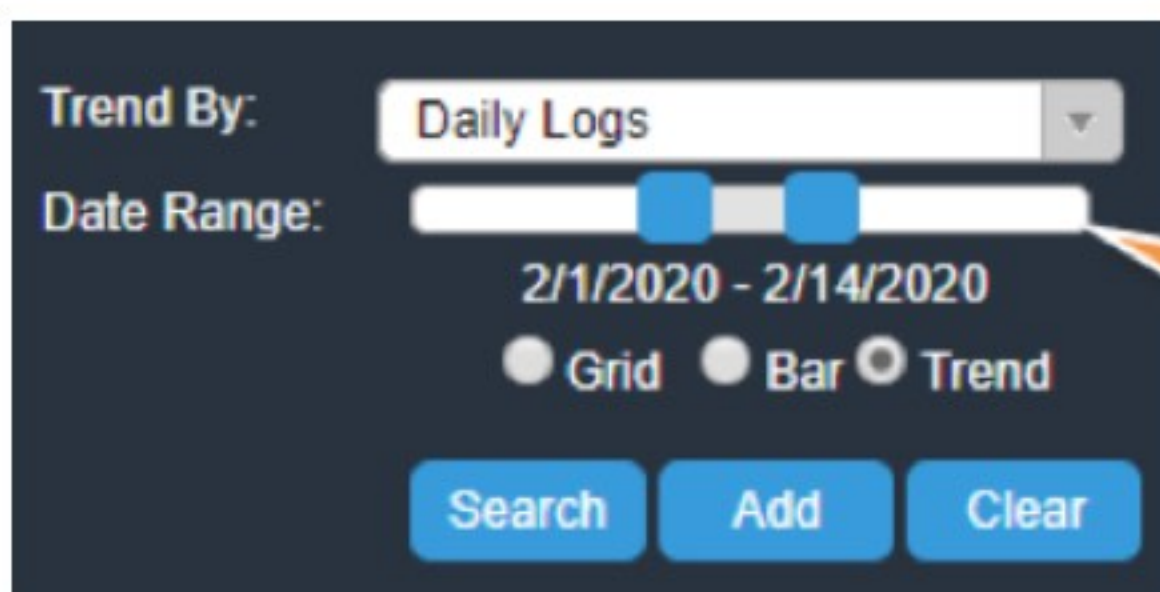
Filters located in Acuity's left panel - enabled or disabled based on role - determine what information is displayed in the main report window.

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.

## Performance Trend Report

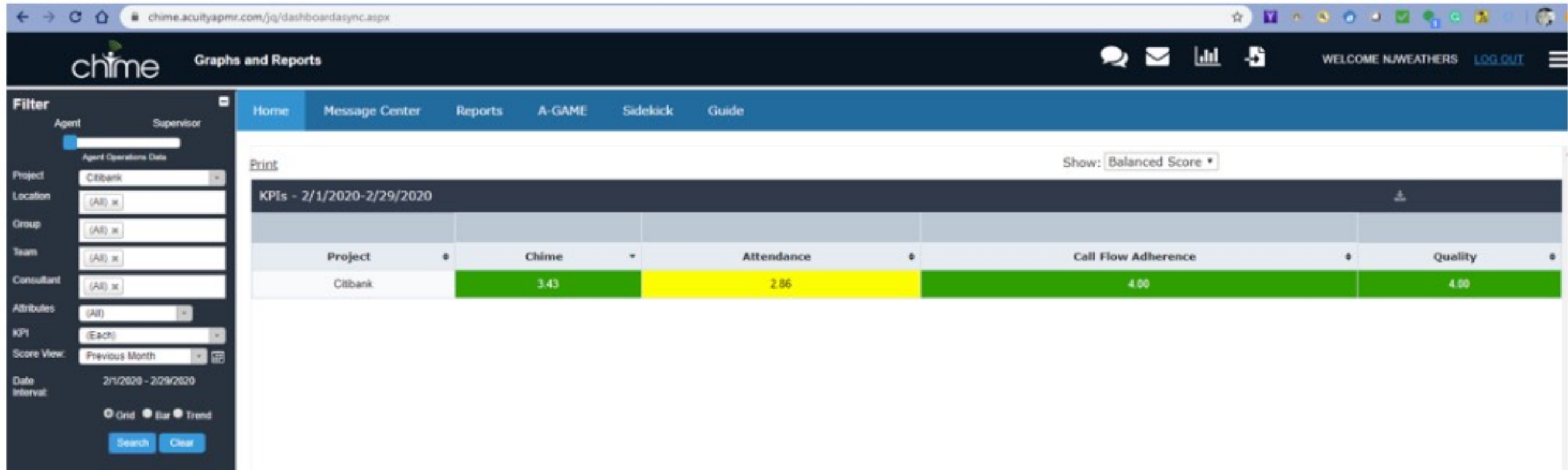
To view historical trends of overall or KPI-specific score, click **Trend** and set the desired beginning and end dates using the slider.



Adjust start and end dates with slider to set trend date range. Then click **Search**.

## 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.



## Report Settings

Acuity Settings allow you to change the report display appearance. **Performance Colors** reflect KPI performance as calibrated to defined 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 score or specific KPI values as either "calibrated" performance scores or Raw data values.

The Settings panel shows options for Graph Appearance and Score Basis. Under Graph Appearance, there are checkboxes for Performance Colors and Series Colors. Under Score Basis, there are radio buttons for Balanced and Raw. The Balanced option is selected.

**Settings**

**Graph Appearance**

Performance Colors ☐ Series Colors ☐

Display Red/Yellow/Green for all bars.

**Score Basis**

Balanced ☒ Raw ☐

Show Balanced Score

## Password Reset

1. To reset an employee's password, first select that employee from the "Consultant" filter on the left

The Filter panel shows various filters for the report. The Consultant dropdown is highlighted with a red box, indicating it should be used to select the employee for password reset.

**Filter**

Agent  Supervisor

Agent Operations Data

Project  AIM MCA Synchrony

Location  (All)

Group  (All)

Team  (All)

Consultant  (All)

Attributes  (All)

KPI  (Each)

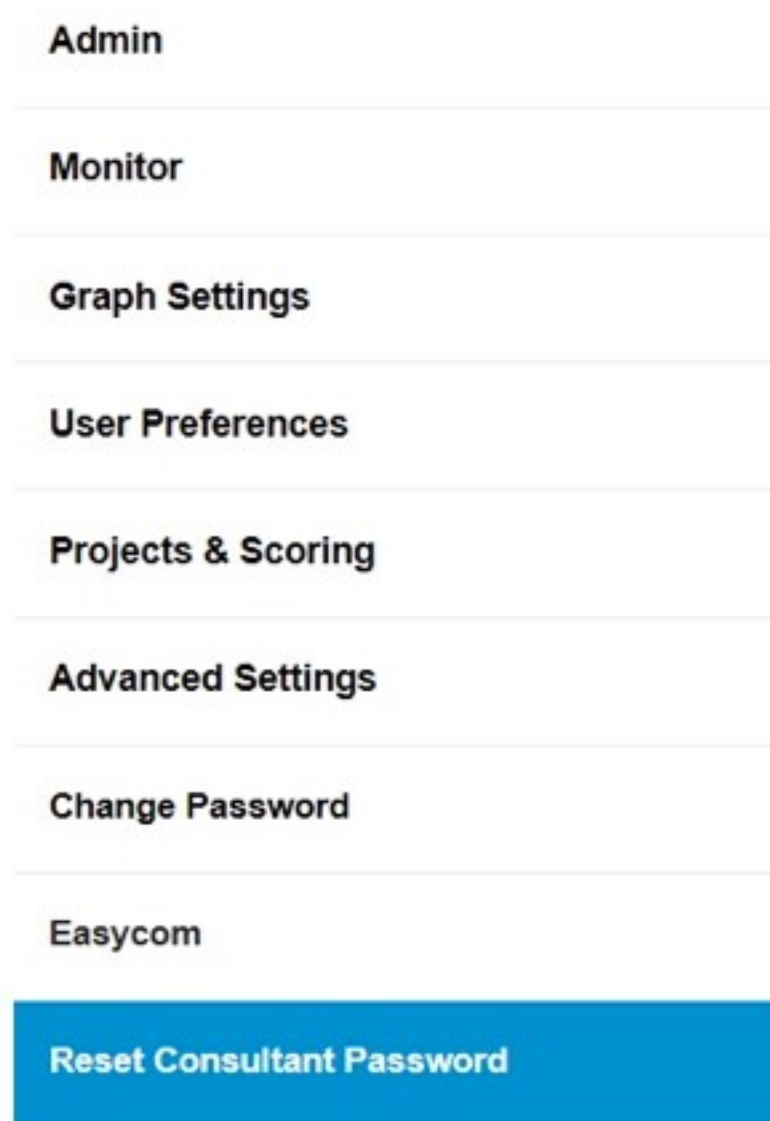
Score View:  Current Month

Date Interval:  2/1/2020 - 2/29/2020

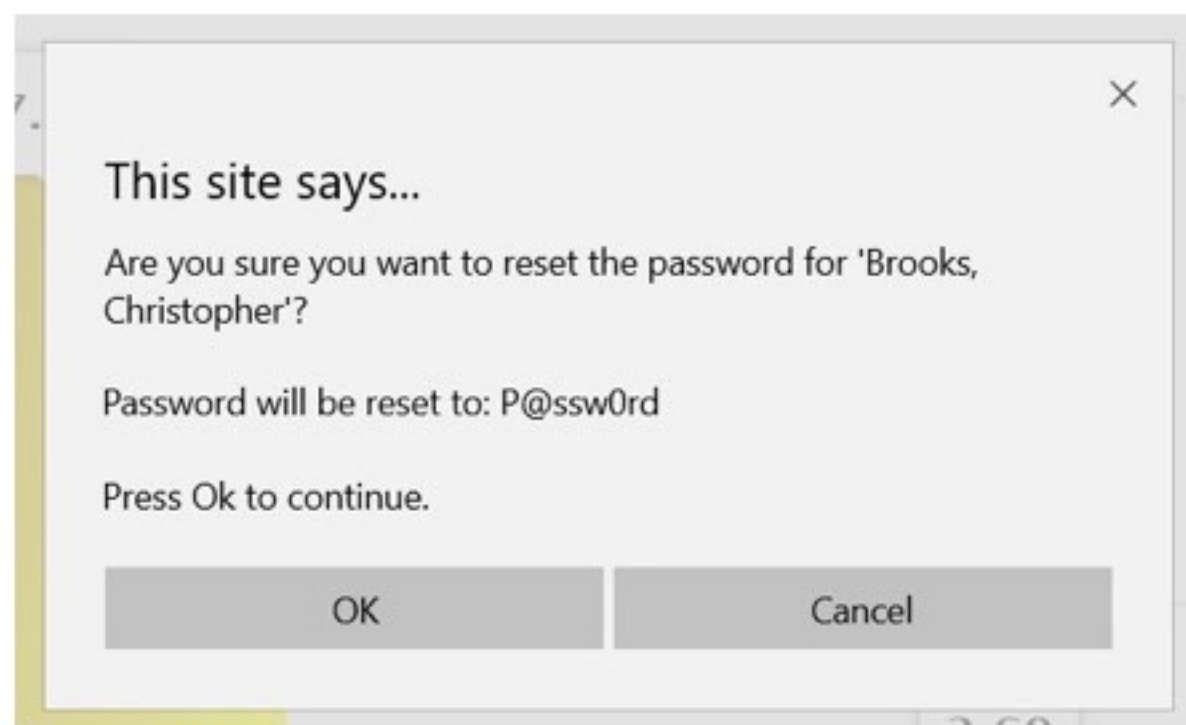
☐ Grid ☐ Bar ☐ Trend



2. Open the menu and select "Reset Consultant Password"



3. Once clicking "Reset Consultant Password", a prompt will appear asking you to confirm the password change, along with what the new password will be



4. To confirm the password change, simply click "OK"

## 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...

### Accessing Sidekick



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 <span>Add New Record</span>						
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

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)

Basis: Standard

Current Value: 60

% Increase: 5

Goal: 63.00

When: 05/30/2019

Follow-Up: Yes

Date Closed: 6/1/2019

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.



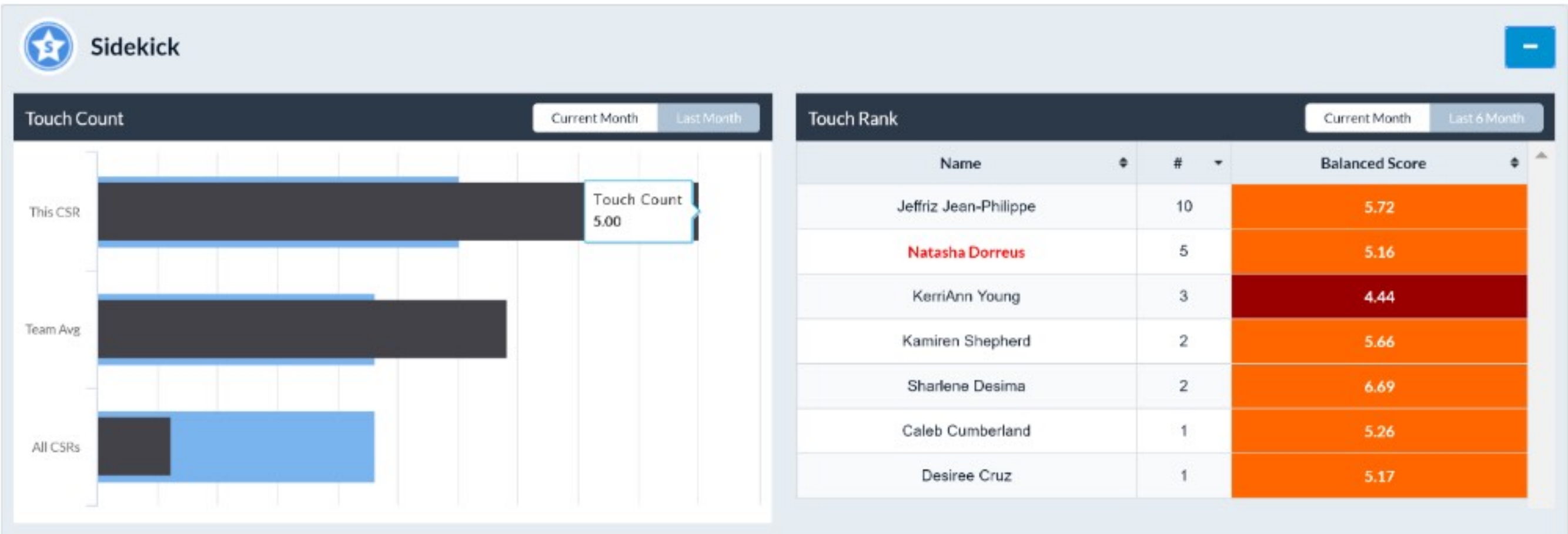


# Touch Count / Touch Rank

## 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.

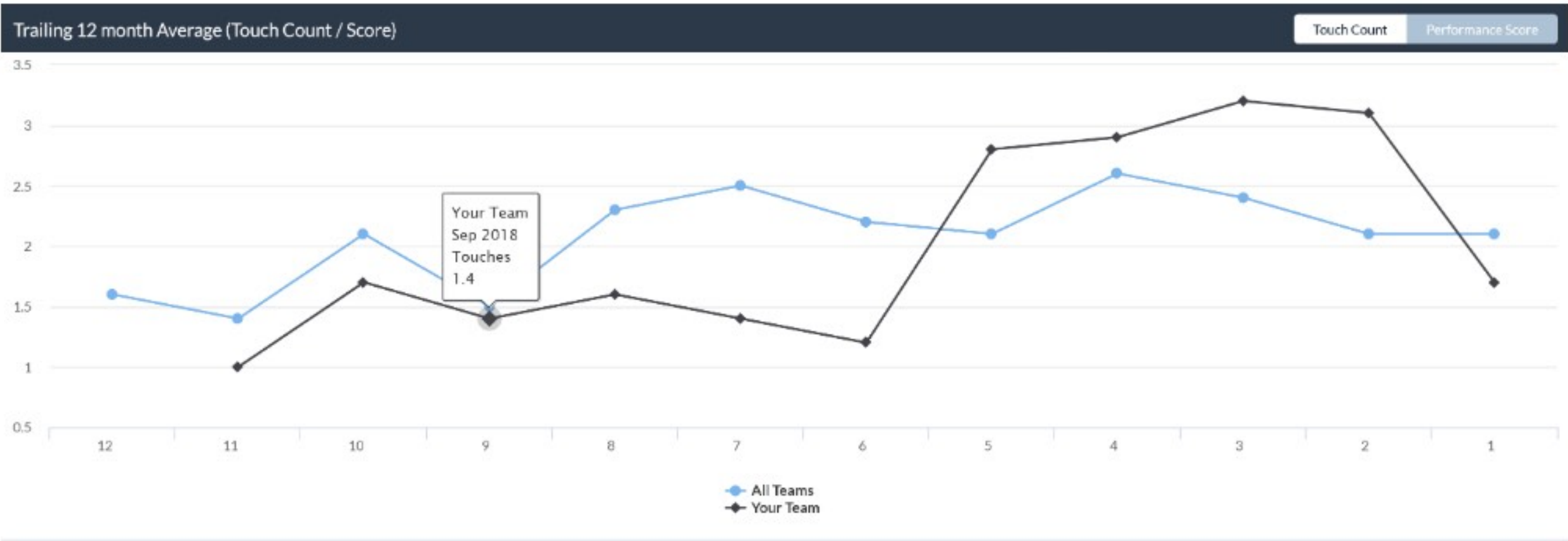


## Touch Rank

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.





# Sidekick Touch Quality

The new Sidekick Touch Quality feature provides supervisors with real-time insight into the support quality delivered to their agents. Touch Quality allows employees to anonymously rate each one of their interactions with their supervisor on a scale from 1 to 5. The addition of Touch Quality to the Sidekick support system produces a continuous measure of employee satisfaction and ensures the integrity of support delivery.

## Touch Quality Workflow

1. Touch Quality is a process that takes place after a Sidekick Journal entry has been completed by a supervisor for one of their agents

Journal Entry for BArnold

Entry Date01/23/2020

Delivered ByLast name, First name

CategorySelect

Details/Issues

Resolution/Follow-up

Set Goal

KPI

Basis

Current Value

% Increase

Goal

Select

Select

When

Follow-Up

Date Closed

01/23/2020

No

mm/dd/yyyy

mm/dd/yyyy

Submit

2. Once a journal entry has been submitted for an agent, an automatic notification is sent to the agent to acknowledge and anonymously rate that interaction with their supervisor
- a. The automatic notification will be received via the message center inside of Acuity, which can be accessed by clicking the Envelope Icon or clicking "Message Center" and opening the notification message



- b. The notification message will include the following information (also pictured below):
- i. Date the journal entry was submitted
  - ii. Reason for the entry (example: Coaching or Recognition)
  - iii. Details or Issues that were discussed (areas of opportunity)
  - iv. Resolution or Follow Up notes (action plan)
  - v. Any goals that were set (Note: if no goals were set, no data will appear)
  - vi. Link to rate the recent support experience

A journal entry for a coaching, recognition, or support has been submitted by your supervisor on 01/23/2020. Please acknowledge and rate the experience.

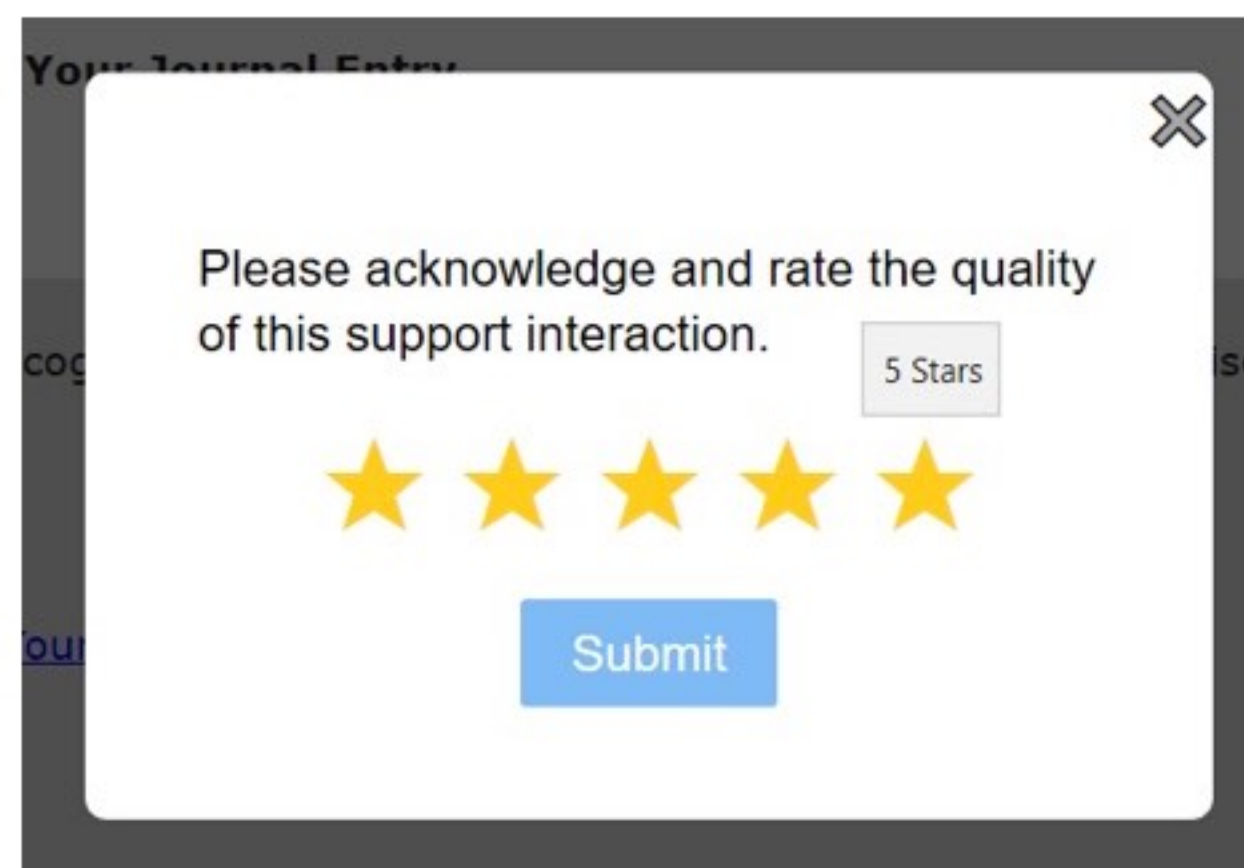
Reason: Recognition  
Details/Issues: TEST - Employee has shown great improvement over the past 90 days. AHT has improved by 15%, Quality has improved by 10%, and Attendance has improved by 20%.  
Resolution/Follow-up: TEST - Keep up the good work!

[Please Acknowledge and Rate Your Recent Support Experience](#)



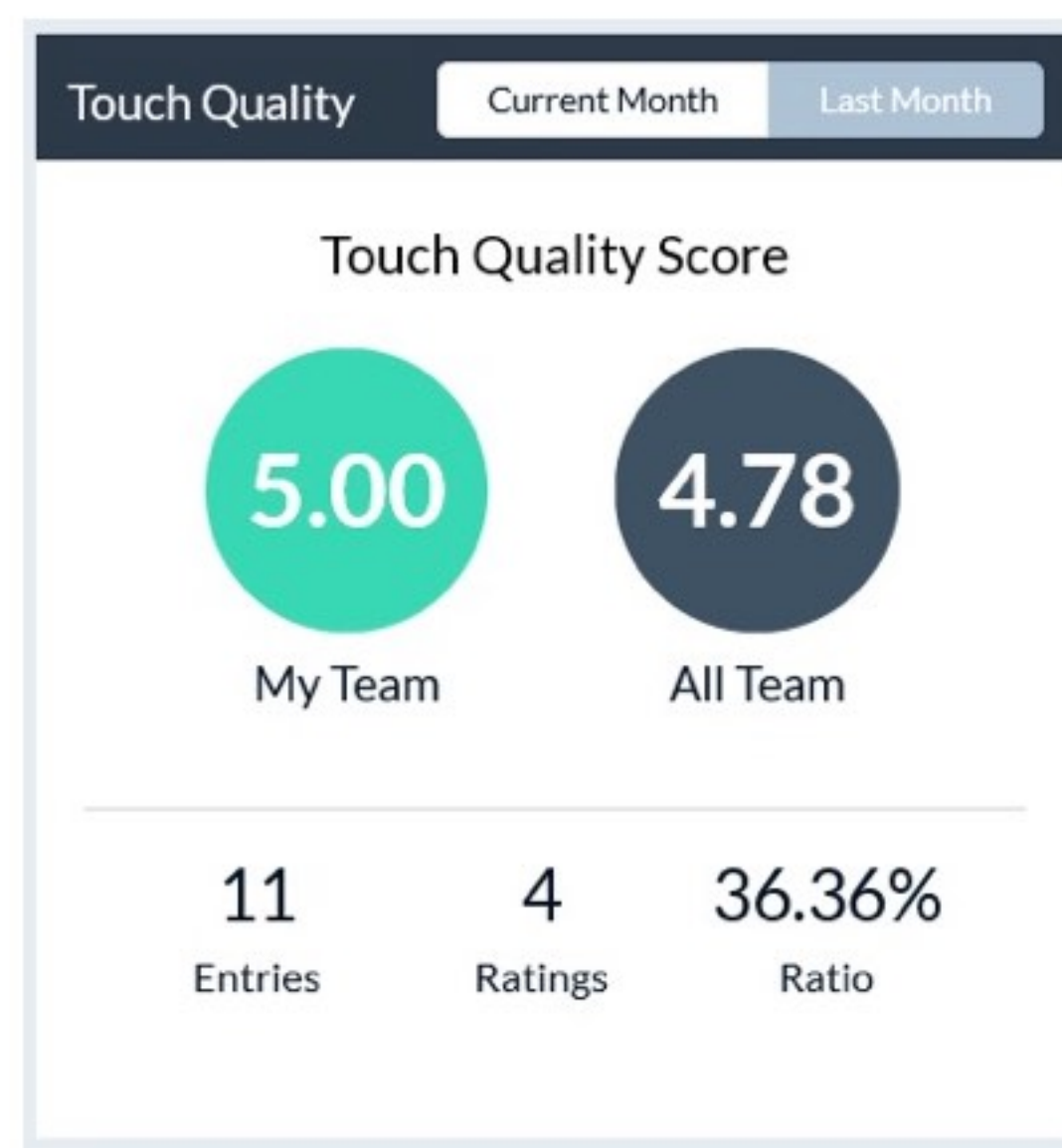
3. To rate the interaction, agents will simply click the blue link that reads, "Please Acknowledge and Rate Your Recent Support Experience" which will open a window that allows the employee to select between one and five stars to rate the interaction

a. NOTE: ALL RATINGS ARE ANONYMOUS TO SUPERVISORS



The screenshot shows a modal window titled "Your Journal Entry" with a close button (X) in the top right corner. The main text inside the modal reads: "Please acknowledge and rate the quality of this support interaction." Below this text is a "5 Stars" label and five yellow stars. At the bottom of the modal is a blue "Submit" button.

4. Once ratings are submitted, supervisors and managers will be able to track their Touch Quality scores through the Sidekick page, using the Touch Quality chart



a. The "My Team" score is the average score of all ratings received for the selected supervisor's team during the chosen date range

i. There are currently two date range options: Current Month and Previous Month

b. The "All Team" score is the average score of all ratings received for all teams assigned to the selected Project

i. This provides supervisors and managers with the ability to compare employee satisfaction against multiple teams, and the average for all teams

c. Additional information is provided along the bottom of the graph, which includes the number of entries (journal entries submitted), number of ratings (how many of the entries have been acknowledged and rated), and the ratio (Ratings / Number of Entries)



## Reporting

1. Management can easily track and view the Touch Quality data, along with additional Sidekick data, through the Reports menu on the Main Dashboard



2. The Sidekick Summary report provides a summary of Sidekick data for the selected team(s)

a. The filters on the left can be used to filter the data that populates in the report

- i. Selecting "Each" in the Team filter will populate data for each team associated with the selected Project
- ii. Selecting "Each" in the CSR filter will populate data for each CSR associated with the selected Team or Project

b. Data shown includes:

- i. Team Name or CSR Name
- ii. Balanced Score (Overall Balanced Score for the team or CSR)
- iii. Touch Count (Total number of journal entries submitted for the team or CSR)
- iv. Touch Quality (Touch Quality rating from the team or CSR)
- v. Ratings Count (Total number of ratings received from the team or CSR)
- vi. Rating Percentage (Ratings Count / Touch Count)

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A-GAME

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SEARCH:

Search Report

SELECT REPORT:

Sidekick Summary

IN-TRAINING:

Include

GROUPING:

Combined

Print

1/1/2020-1/31/2020

ID					
Team	Balanced Score	Touch Count	Touch Quality	Ratings Count	Rating Percentage
Chamonique Owens Team	7.59	33	4.50	10	30.30%
Training Team AZ	5.80	24	4.86	9	37.50%
Raquel Bowie Team	7.32	21	5.00	1	4.76%
Analisa Farias Team	8.05	12	5.00	4	33.33%
James Kimes Team	8.56	8	5.00	3	37.50%
Maria Sosa Team	6.89	4	3.00	1	25.00%
Timothy Hilbert Team	8.97	3	0.00	0	0.00%
Aron Felix Team	7.84	2	0.00	0	0.00%
Queline Gilbert Team	7.41	2	0.00	0	0.00%
Robert Altamirano Team	6.36	0	0.00	0	0.00%
Briana Zavala Team	8.62	0	0.00	0	0.00%