**eCL Overview**

**What is it?**

eCL (short for eCoaching Log) is a system that call center operations uses to help track and improve the quality and performance primarily of CSRs. This system allows for logs to be submitted with information about coaching presented to or needed for a CSR. Coaching Logs can be positive (Reinforcement – “you did a great job!”) or negative (Opportunity – “you need to improve in this area”). There are many sources of the information used to create the logs and many reasons associated with them. The eCL system contains a dashboard feature which allows CSRs to see their logs and also for supervisors and managers to track their team members. Most logs have a workflow associated with them whereby supervisors (and sometimes managers) review logs to determine what coaching or action plans should be developed and delivered. Then the CSR can acknowledge receipt of the coaching to complete the log.

**History**

The eCL system was developed to replace what operations tracked in SharePoint/InfoPath. Initially designed and implemented for CSRs, additional modules have been added for other employee levels. These modules allow for similar tracking of Supervisors, Quality Specialists, LSAs, and Trainers. Disciplinary warnings can also be tracked through the eCL dashboard.

**User Information**

eCL imports employee information from Aspect WFM (Workforce Management). A second data feed from Workday (the Human Capital system) is also used. Together, these input files create employee information which includes employee id, job code, hierarchy (employee, immediate supervisor, manager), hierarchy service dates (start and end date when they reported to a particular supervisor), and status (active/inactive/leave of absence). A third file is used to load information for Human Capital personnel who need access to the Historical Dashboard.

**Coaching Log Information**

Most employees in the CCO have access to eCL and can submit logs to CSRs. However, submission of logs in specific modules is limited to those with certain job codes. For example, only those job codes associated with the Training department can submit logs to Trainers in the Training module. Access to eCL is based on the user’s LAN ID when logged on and their job code from the employee hierarchy table. Job codes help determine a user’s role in the system which in turn controls what the user can see and do.

*Sources*

The majority of coaching logs are generated from the Quality Monitoring scorecards. These are imported into eCL with a data feed from Interface to Quality Systems (IQS). Another source of data feed files is referred to Outliers or Outlier Management Reporting (OMR). These reports/feed files are generated usually by the Analytics team after analyzing other systems. Inappropriately transferring a call and escalating a call are two examples. There are also reports or feed files from Training and Quality teams which will generate coaching logs. A generic or common feed is available where logs can be generated in any module for any source, coaching reason, sub-reason and value that can be submitted through the user interface. Another source of log information is from eCL itself. Certain existing logs are queried which will then generate a new coaching log.

Logs can be submitted manually through the eCL system user interface as well. On-line submission includes sources such as quality monitoring, reported by CMS or another CSR, internal reporting, training, etc.… Sources in the other modules are similar, but associated with their particular job or role. Sources can be Direct (meaning the submitter will conduct the coaching) or Indirect (meaning someone other than the submitter – generally the supervisor or manager – will conduct the coaching).

Logs submitted through the user interface can also be flagged for future follow-up.

*Reasons*

Coaching reasons and sub-reasons help to define and clarify the log and the need for coaching. They give an indication of why the log was submitted. Generally the reasons/sub-reasons for logs from the data feeds are defaulted to specific values based on information within the data record. For example, a report code associated with Overdue Training (ODT) is then associated with a reason/sub-reason combination of Current Coaching Initiatives/Overdue Training Report.

For manually submitted logs, the submitter can select one or more reasons and one or more sub-reasons. Most all reasons contain an Other sub-reason as a catch-all for anything which isn’t specified. Reasons/sub-reasons can have either an Opportunity or Reinforcement value, but some are only Opportunities and others only Reinforcements.

If the issue resulting in a log submission is particularly egregious, the log can be designated as a Customer Service Escalation (CSE). These generally require a manager to review and determine if it really is a CSE or not. If it is determined to not be a CSE, the behavior identified in the log will still be coached. CSEs are only Opportunities and include such things as arguing with or threatening a caller and using profanity.

Some logs require research by the manager or supervisor to determine if coaching is needed. If it is determined that coaching is not required then the log is inactivated and no further action is needed. If it does require coaching, then the manager enters appropriate notes and the log is routed to the supervisor or employee.

Behavior of a CSR can also lead to a progressive disciplinary warning, categorized as Formal Coaching, Verbal, Written, or Final Written Warnings. After the manager and supervisor work with Human Capital and deliver the warning, a log is entered in eCL to track on the dashboard. The log is then acknowledged by the CSR. The log remains active for 90 days before rolling off the dashboard.

Reasons and sub-reasons for the other modules are similar as they are for CSRs.

*eMail Notifications*

When a log is submitted through the user interface an email notification is sent. Who it is sent to depends on the type of log. While the ultimate recipient of a coaching log is the CSR (or supervisor, quality monitor, LSA, trainer), the email notification goes to the appropriate person in the hierarchy based on the defined workflow. For example, if it is CSE, then the email goes to manager for review. Non-CSE opportunities usually go to the supervisor for review, but some can go directly to the employee to review, acknowledge and complete.

Notifications of coaching logs submitted through data feeds are batched and sent by a scheduled task in non-peak hours.

When a CSR acknowledges and completes a log, an email notification is sent to their supervisor and manager which contains comments entered by the CSR.

Under certain circumstances, reminder emails are sent to managers or supervisors if coaching or follow-up has not occurred within a specified time frame. This is to ensure coaching occurs within the agreed service level agreement (SLA).

*Workflow*

Workflow refers to the routing of the log for coaching, review, notes and comments. For example, a log with a CSE is initially routed to the manager to review and determine if it truly is a customer service escalation. The manager decides and selects the appropriate fields on the screen, enters notes about their decision and submits the reviewed log. The log is then routed to the supervisor who will review the manager’s notes and act accordingly. The supervisor will deliver the appropriate coaching based on the manager’s notes, enter their own notes and submit the reviewed log. The log is then routed to the employee who can review the supervisor notes and acknowledge the receipt of the coaching. The employee can then enter their own comments and when submitted, the log becomes complete. Other logs go directly to the employee to submit their comments and complete. Still other logs require a simple acknowledgement by the employee and their supervisor.

Logs flagged for follow-up start with the normal workflow. When the employee acknowledges the log, instead of becoming complete, the log is routed back to the supervisor to conduct further coaching on the follow-up date. The log then goes back to the employee who can review, acknowledge and complete the log.

**Dashboard**

The Dashboard displays the coaching logs associated with the user. Which dashboard sections are displayed is determined by the user’s job code and/or position in the hierarchy. CSRs see My Pending, My Follow-up, My Completed sections. My Pending are those logs which require action by the CSR. My Follow-up are those logs where the supervisor is to conduct a follow-up coaching session on the follow-up date. My Completed are the CSRs acknowledged and completed logs. Supervisors and Managers have additional sections their teams’ Pending, Completed and Warnings logs. They also have a My Submissions section, but do not have a My Follow-up section. Supervisors and Managers have access to the Historical dashboard. The Historical Dashboard allows for reporting and filtering of logs including those for employees outside of the normal hierarchy. However, supervisors and managers can only see the notes of those in their hierarchy. People with other roles, such as program managers, trainers, Human Capital also have access to the Historical Dashboard. For these others, access to view notes and comments is granted though a separate Access Control List application.

The review page from one of the sections on My Dashboard displays the information from the log. This includes a description, current hierarchy, status, and notes if available. Those in a ‘pending’ status allow for some data entry (for example a supervisors coaching session notes) or CSR comments.

Various rules define who can see what on the Dashboards. Supervisors and managers can only see and review logs for themselves and for those in their hierarchy. For example, a manager who has one or more supervisors as a direct report can see all the logs for the CSRs which report to the supervisors which report to him or her. Supervisors and Managers may be able to see other logs on the Historical Dashboard, but can only review those belonging to their teams.

The Director Dashboard allows for senior leaders to view the logs for employees in their reporting hierarchy even if not direct reports. This dashboard is organized by site or location. All fields of individual logs are available and displayed to the senior managers.

**Survey**

eCL provides a way to survey CSRs regarding their coaching experience. Based on certain criteria, CSRs will receive an email notification to follow a link and complete a series of survey questions and submit their answers.

**Administration**

Frequently, there is a need to inactivate coaching or warning logs (for example, if a CSR is on extended leave). An Administration Tool was developed so Managers in each modules can inactivate, reactivate, and reassign coaching logs and inactivate and reactivate warning logs. When reassigning logs, it must to go someone at that same level as the person it’s being reassigned from.

When requested, the Program team has the ability in the administrative application to physically delete a log. In production, only the Program has access to a screen to search for and confirm deletion of a log.

Another process in the administrative application is the Access Control List. This allows the Program team to grant access to those whose access may otherwise be limited by their job code or role. For example, it is used to designate ARC CSRs who have a CSR job code, but must be able to submit coaching logs to CSRs. The Access Control List is also used to grant permissions to the Historical Dashboard and to designate Directors.

**Reporting**

Some reporting functions are incorporated within the administration application. The reports allow the program team to report different aspects of the eCoaching data. The reports can be saved to a file in multiple formats. The reports include the following.

*Coaching Log Summary and Quality Now Coaching Log Summary* – will report all desired fields of coaching logs based on selected criteria. The selection criteria include module, employee, site, coaching reason, sub-coaching reason, status and date range based on submitted date. Quality Now summary only reports Quality Now coaching logs.

*Warning Log Summary* – will report all desired fields of warning logs based on selected criteria. The selection criteria include module, employee, site, warning reason, sub-warning reason, date range based on submitted date, status (completed/inactive) and state (active/expired).

*Hierarchy Summary* – will report all desired fields of an employee’s hierarchy (supervisor/manager) based on selected criteria. The selection criteria include site and employee.

*Administration Activity Summary* – will report all desired fields of activity within the administration tool such as inactivating logs, reactivating logs, and reassigning logs based on selected criteria. The selection criteria include type of log (coaching/warning), form name, activity (inactivation/reactivation/reassignment), and date range based on activity date.

*eCoaching Log Site Usage* – will report eCL usage either in Hourly, Daily, Weekly, or Monthly graphical and tabular displays. This report can give an indication of the busiest day of the week or time of the day.

