**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 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 work flow 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, however, additional modules have been added. These modules allow for similar tracking of Supervisors, Quality Specialists, LSAs, and Trainers. HR warnings can also be tracked through the eCL dashboard.

**User Information**

eCL imports employee information from WFM/Aspect reports. A second data feed from PeopleSoft (the HR 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 HR personnel who need access to the Historical Dashboard.

**Coaching Log Information**

Most everyone on CCO has access to eCL and non-CSRs can submit logs to CSRs. However, submission of logs in other modules is limited to those with specific 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.

*Sources*

The majority of coaching logs are generated from the Quality Call Monitoring (QCM) and Providing Peace of Mind (PPOM) scorecards. These are imported into eCL from 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 systems other than call monitoring. Inappropriately transferring a call and escalating a call are two examples. A third source of data feed reports is from Electronic Timekeeping System (ETS) by way of time card administration team. These reports contain information about time keeping infractions such as charging time to the wrong charge code or not submitting the time card by the deadline. Supervisors can also receive ETS logs for approving an incorrect time card. 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.

*Reasons*

Coaching reasons and sub-reasons help to define and clarify the log and the coaching needed. They give an indication 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 is associated with using the holiday charge code for a day which isn’t a recognized company holiday. The code in turn is associated with a corresponding reason/sub-reason combination.

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.

Most all OMR logs require research by the manager to determine if coaching is needed. If the manager determines 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.

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

Reasons and sub-reasons for the other modules are similar, but different than 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 specialist, LSA, trainer), the email notification goes to the appropriate person in the hierarchy based on the defined work flow. 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 off hours.

Under certain circumstances, reminder emails are sent to managers or supervisors if coaching has not occurred within a specified time frame. This is to ensure coaching occurs within the agreed service level agreement (SLA). Also, when a CSR completes a log, an email is sent to the supervisor and manager.

*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. It is then routed to the employee who can review the supervisor notes and acknowledge the receipt of the coaching. The employee can then can enter their own comments and when submitted, the log becomes complete. Other logs go directly to the employee who can submit their comments. Still other logs require a simple acknowledgement by the employee and their supervisor.

**Dashboard**

The Dashboard displays the coaching logs associated with the user. Which dashboards are available and what is displayed is determined by the user’s job code and/or position in the hierarchy. CSRs only see My Dashboard which shows their pending (requiring action by the CSR) and completed logs. Supervisors and Managers have sections on their dashboard for their own pending and completed logs and their teams’ logs including warnings. They also have a My Submissions dashboard and access to the Historical dashboard. My Submissions displays the logs they have manually submitted. The Historical dashboard allows for reporting and filtering of logs including those for employees outside of the normal hierarchy. People with other roles, such as program managers, trainers, HR also have access to the Historical Dashboard. Access to view notes and comments is granted though a separate Access Control List application.

The review page from 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 or 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 Senior Manager Dashboard allows for senior leaders to view the logs for employees in their reporting hierarchy even if not direct reports. This dashboard is more graphically based but details can be displayed and selected for review. 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 and 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.

Within the administrative application is a process for the Program team to physically delete a log (usually requested by HR due to containing inappropriate information). 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.

**Reporting**

Reporting functions are incorporated with 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.

*eCL 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.

*eCL 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).

*eCL 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.

*eCL 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.