**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 of CSRs. This system allows for logs to be submitted with information about coaching presented to 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; Supervisor, Quality Specialists, LSA, and Training modules have been added to the system. HR warnings can also be tracked through the eCL dashboard.

**User Information**

eCL imports user information originating 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 job code, a 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 for only for those HR personnel who need access to the Historical Dashboard.

**Coaching Log Information**

Most everyone on CCO has access to eCL and no-CSRs can submit logs to CSRs. However, submission of logs in other modules is limited to those with specific job codes. Access 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 monitoring and PPoM (Providing Peace of Mind) scorecards. These are imported into eCL from a data feed from IQS. Another source of data feed files is referred to Outliers or OMR (Outlier Management Reporting). These reports/feed files are generated by the Analytics team after analyzing systems other than call monitoring such as NGD. Inappropriately transferring a call and escalating a call are two examples. A third source of data feed reports is from ETS (Electronic Timekeeping System) 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 logs for approving an incorrect time card. There are also reports from Training and Quality teams with data feeds which will generate coaching logs. A generic 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.

Logs can also be submitted manually through the eCL system. On-line submission includes sources such as Quality monitoring, OMR, and ETS, as well as other such as 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 or clarify the log and 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.

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. Most reasons/sub-reasons can be either Opportunity or Reinforcement, 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. These require a manager to review and determine if it really is a CSE or not. CSEs are only Opportunities and include such things as arguing with or threatening a caller, and use of 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 working with HR and delivering 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 again 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 the 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 go to the supervisor for review.

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.

*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.

**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 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. Historical dashboard allows for reporting and filtering of logs including those for employees outside of a manger’s hierarchy. People with other roles, such as program managers, trainers, ARC CSRs, HR also have access to the Historical Dashboard. Access is granted though a separate Access Control List application.

The review page 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 if more graphically based but details can be displayed and selected for review. All fields 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.

**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.

A separate administrative application is available 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.

A third 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, ARC CSRs have a CSR job code, but must be able to submit coaching logs to CSRs. The Access Control List is used to define those permissions.