



SmartAgent Training Bootcamp – Quality Assurance



Version	Date	Author	Changes
2.8	19/08/2021	Paul Egan & Aliona Radetskaya	QA Question types



Introduction

The purpose of this guide is to provide you with an introduction to using the Quality Assurance Module of SmartAgent.

About SmartAgent Quality Assurance

SmartAgent Quality Assurance is a modular addition to the standard SmartAgent build that can help organisations monitor call quality and coach agent performance in an integrated and co-ordinated way.

Call Monitoring templates are easy to create and can ensure a consistent approach is taken when listening to calls for Coaching and Quality purposes.

You can use a range of different Question types to create a bespoke call monitoring or call coaching form to suit your organisation. Agents can see their own evaluated scores for personal development.

The Call Quality activity can also be further checked using the Calibration function to ensure consistency of approach or to provide an additional check on the call monitoring activity.



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Setting up Quality Assurance – Basic Navigation

The Quality Assurance module is accessed from the main side menu, if you have the necessary permissions in your Security Profile.



From this menu individuals can look at their own scores, conduct evaluations & calibrations, view QA reports or create and edit templates, depending on their permission level.



Evaluating a contact using an existing form

When a supervisor uses the "Contact search" function to search for a particular call recording or transcript and they have access to the QA module then they will see an additional Quality Assurance field below the contact details.

Overtext Details						
Contact Details			Initiation Method	Duration		
c6cb9a4e-062c-4f6b-852a-a3429ea	a81199	ð	INBOUND	02m 45s		
Start time	External ID		Customer Number	System Numbe	er	
08/11/21, 13:28	Unknown	Ø	07917 335550	0113 868 5253		
Queue	Reason for contact		Time in Queue	ACW Duration		
Customer Support (voice)	Customer Support		00m 06s	00m 49s		
Agent	Disconnect reason					
Paul Egan	AGENT_DISCONNECT					
Notes						
No notes						
		Show	More ~			
Call recording			00:00:00 / 00:02:45	Speed: 1x	Iload	^
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00:00						02:4
Quality Assurance					In Progress	^
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If you select the "Open Evaluation" button you will be able to evaluate the contact, once you have selected the evaluation form to be used.

ATE OF CONTACT	AGENT	QUEUE	DURATION
23/04/2021 13:49		Customer Support (voice)	01m 35s
16/04/2021 16:33		Administration (voice)	00m 18s
		<< 3 of 3 > >>	Go to page 1 Go
Choose Score Template* Test Template		\$	6

You will need to select the scoring template from the dropdown box.



You can then listen to the call and complete the QA form online. When you are finished select the green "calculate score" button. Once you have selected the "Calculate Score" button this locks in the score for the call.

Paul Offline: 1d 00h 01m 39	is V					
< Back						
Contact Details						Sample QA Form Example
Contact ID			Initiation Method	Duration		A
705f8b9d-ff6c-4fc1-bfb0-bcec3	3a9e0a24	ß	OUTBOUND	00m 06s		Call Opening
Start time	External ID		Customer Number	System Number		Did the agent answer the call using the correct greeting message? Did the agent sound ready to help the customer? Could you hear them smile
10/08/21, 13:27	Unknown	0	0333 090 5871	0113 868 5253		1Standard not met 2 Basics met 3 Excellent example
Queue	Reason for contact		Time in Queue	ACW Duration		
Outbound	Unknown		00m 00s	01m 00s		Comments
Agent	Disconnect reason					
Dave Mulqueeney	AGENT_DISCONNECT					
Notes						ID &V or Legal compliance - Pass or fail
CircleLoop Test Call						2 Was the Customer ID&V'd in correct manner. Was the legal Compliance statement readout clearly?
Call recording		Show	More -	00:00:00 / 00:00:07 F Speed: 1x	^ 0	3 correct items of IDAV or procedure followed Legal Compliance statement read out in full "This is the full and if the compliance statement that agents have to read out to customers so they are fully aware of any TRGS or equilatory compliance standards - Can you please confirm you gover Not completed correctly Completed but rushed Completed clearly
Q×					00:07	Comments
						General Call Quality - Multiple Questions within section 3 Bit the agent make the conversation Personal/Lailored to the reason for the call? Thesign every servers as they rish to be freeded as usual who building agood with conteness, that means approaching what the customer is asking of us and tailoring our approach in a way that is right for them. Stock / stilled answers Some personalisation Customer delighted Commenta

Previous call evaluations can be searched and viewed from the "evaluations" submenu which can show scores and progress of an evaluation. You can either use the basic search menu, or select the advanced search function to filter your search even further.

If an evaluation gets interrupted or is not completed it will show as "in progress" on this screen and the evaluator can go back in a complete the evaluation at a later date.

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Creating an Evaluation Form template

From the Quality Assurance Menu if you select the Templates option you will be presented with a list of current templates loaded into your setup.

You can select the three dots at the right hand edge of the template details to edit an existing template, duplicate it or delete it.

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Templates				
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New text template (email)	Email,	05/08/2022	05/08/2022	
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GA mentioning	EMAL	29/07/2022	29/97/2022	
Ruslan template	VOICE	15/07/2022	28/67/2022	
Sisco testing email	EMAL	11/11/2020	27/07/2022	

If you Select the Duplicate option, you can then rename this template and edit this new copy if you just want to make minor changes to a form.

To create a new template select the green button.



When you select the Create Template option you are presented with a skeleton form with just one question, upon which to build your form as per your requirements. Here you will specify the template title and passmark percentage required. You can also add in an overall summary field if required.



Nume*		
Test]		
Pass Percentage*		
100 I B		Show Summary
Channel*		
0		
Section name*		
		1
Question 1		^
What question type would you like to add?"		
Choose an option	0	

You can create particular forms for each channel or type and you should use a naming convention as each template will need it's own unique name.

By clicking on the three dots in the section title field, you can add further sections or copy over sections and questions from other templates. So you may want to consider creating a set of Modular sections that may apply across different channels or departments.

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harres"				
EMAIL	0			
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Question 2 (Inquirer) - Question 2				v
Question 3 (hum) - Question 3				~
Question 4 (Data picker) - Data				¥ (
Question 5 (nulti-line text input) - Que	than 5			

Alternatively you can create a form with many sections manually with multiple questions and question types within each section. So, for example, you may have an opening section with questions about the greeting, use of ID&V etc

You can create a new section, move it around and change it's order and delete a section from the three dot menu. We do recommend saving the form as you go as it will time-out if no activity occurs.



Karre*	
Test	
Pass Percentage* 60	Show Summa
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Section name*	1
Question 1	^
What question type would you like to add?"	
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Checkbox (select one or more options)	
Uroposwn (select one option from a list) Radio (select one option)	
Data pickar (salact a mita)	
Text input (entertext)	

There are a number of different question types you can use as shown above. When you create a question, it will default to offer 2 scoring options, but you can always add more by selecting the three dots menu and select the "add option". You can also specify if a particular answer is an "Immediate fail", no matter what the score. This might be used when dealing with compliance issues.

If you want to add another scoring option just select the three dots in the Options section and select the create new option and label it.

In each section you can select if the question is required or optional – If a question is not marked as Required you can specify whether to skip to the next question or to the end of the form.

The "allow comments" option will create a text field allowing people using the form to create notes or give specific coaching feedback with the form itself.

Question Types

Checkbox – Creates a checkbox response for the evaluator and any "Immediate Fail" responses are highlighted in red

Narie*				Section A
Test				1 0 J
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Channel*				option A 🚺
EMAL.	0			option B
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Dropdown – Creates a dropdown list of possible responses from the options listed in the form

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Radio Buttons – Creates selectable button responses from the options listed in the form



Date Picker – Creates a date picking option on the form





Text Box – Creates a free format text box on the form

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Question 5		
Description	0	
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8		

Scoring

In each question you can specify the number of points available (in the above example this is 10) You can then give a weighted score next to each option. So this could be 10 points for the correct answer 0 for an incorrect answer. Or if you have a more "judgement" score you could give 10 points for a great response, 5 for an average, 0 for a poor response etc.

The overall score will be calculated when all required questions have been responded to and the "calculate score" button has been clicked.

The system will give an overall score in % based on the weighting of questions that have not been skipped. However any responses marked "immediate fail" will result in an overall fail rating , no matter the score.



Calibration Process

Under normal circumstances once a contact has been scored by an evaluator that is the final score given for the contact and it is tagged against the Contact trace record or CTR.

However some organisations require there to be an additional check done on the call evaluation process itself. This might be done by a specialist QA team rather than the supervisors who may want to evaluate and check that the QA form has been used correctly or for some other reason.

Paul Office: 01h 38m 10s 🗸										
Evaluations									New Evaluatio	
Evaluation ID	Centact ID		Agent	٥	ueue	Char	mel			
				0		٥			0	
External ID	Evaluator		Status	A	Agent hierarchy		Choose Score Template			
			0	0		0			Search	
10	CREATED V	CONTACT DATE	AGENT	EVALUATOR	QUEUE	CHANNEL	STATUS	SCORE	CALIBRATION	
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SMARTS-21-07-30-KXK	30/07/2021 11:13	04/05/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Administration (voice)	Voice	Fall	0%		
SMARTS-21-07-27-NEQ	27/07/2021 16:43	04/05/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Customer Support (voice)	Voice	Pass	100%	Marca and a Marca	
SMARTS-21-07-27-FTQ	27/07/2021 16:07	11/05/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Outbound	Voice	Pass	100%	Start calibration	
SMARTS-21-07-27-OMR	27/07/2021 15:51	04/05/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Administration (voice)	Voice	Pass	50%	Delete evaluation	
SMARTS-21-07-27-KUR	27/07/2021 14:55	04/05/2021	Sa-demo-manager SmartAgent	Robin Edwards	Customer Support (voice)	Voice	Pass	100%		
SMARTS-21-07-27-EQU	27/07/2021 14:46	11/05/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Administration (voice)	Voice	Pass	100%		
SMARTS-21-07-27-JBR	27/07/2021 14:23	22/07/2021	Sa-demo-manager SmartAgent	Sayeed Mohammed	Outbound	Voice	Pass	100%		
SMARTS-21-07-27-QAB	27/07/2021 14:21	13/07/2021	Sa-demo-admin SmartAgent	Sayeed Mohammed	Outbound	Voice	Pass	100%		
SMARTS-21-07-27-QJA	27/07/2021 14:17	13/07/2021	Sa-demo-admin SmartAgent	Sayeed Mohammed	Customer Support (volce)	Voice	Pass	100%		

Once evaluated a contact evaluation score is locked in. However if you wanted to get others to calibrate a particular contact, someone with "Calibration" access permission would come to the overall Evaluation screen and select the contact and use the "start calibration" option using the three dots at the right hand side of the screen.

This would "unlock" the existing evaluation score and allow others to submit an additional evaluation of the contact which can be compared on the Calibration screen.

θ	Paul • Offline: 01h 44m 57s 🗸								
	Calibrations								
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	SMARTS-21-07-30-SHG	Sa-demo-manager SmartAgent	11/05/2021 13:04	0%	1	0	Closed	100%	+1009 Stop calibrations
									View evaluation

While the calibration is active it will show on the calibration screen as "in progress".



Comparative scores can be viewed from the calibration screen, while the contact calibration is active. Once the contact has been evaluated by enough additional evaluators the calibration process can be stopped to restore it back to it's locked down status.

The scores from the different evaluators can be compared by selecting the "view calibration" option, which will provide a line by line comparison of the evaluator's scoring of each section / question.

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		< Back											
${}^{\circ}$		ID	AGENT	DATE & TIME	SCORE	STATUS	RESPONSES	IN PROGRESS	CALIBRATION	RESPONSE AVG	DIFFERENCE		
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Ċ	QUESTION			SAYEED MOHAMMED			DAVE MULQU	EENEY	Pass 100%				
7	Did agent greet the customer and establish a name to call the customer?			No Greeting (0)			Greeting done (1)						
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QA Reports

The Quality Assurance reports offers a range of agreed, pre-configured reports that can be used to produce CSV format reports on the QA activities specified.

This can be filtered by particular channel, eg voice or chat, use of a particular score template or by a particular team or department selected from the Agent Hierarchy from within your setup.





Notes



mission labs. Bring the future.