cc: Discover QA Coaching Guide, v5.0 R3

December 2012

Contact Information:
888.922.5526 Option 2 – Support
support@callcopy.com
www.callcopy.com/support

Reference Guide

Security Classification: CallCopy Confidential.

Distribution: Approved internal CallCopy staff only and licensed CallCopy customers.

Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History			
Revision	**Change Description**	**Author**	**Effective Date**
0	Initial Release.	JThomas	2012-04-01
1	Updated conditions for attaching/removing groups from QA forms.	MBuckingham	2012-07-19
2	Added character limits to QA form fields.	MBuckingham	2012-11-26
3	Added example screenshot for Dropdown Question Type.	MBuckingham	2012-12-13

Table of Contents

Introduction

This guide provides information and procedures for using quality assurance (QA) functions on cc: Discover's Coaching and Web Player tabs. Those functions include creating evaluation forms, performing evaluations, setting up content libraries, and running various reports.

The guide assumes that the user is familiar with

- Basic Quality Management (QM) concepts and processes.
- Basic Windows PC usage such as right and left clicking the mouse.
- Usage of the cc: Discover Web Portal.

Please contact your system administrator for the cc: Discover Web Portal URL and for access permissions to the necessary functions.

Create a QA Evaluation Form

This section explains how to create Quality Assurance (QA) evaluation forms for reviewing the work of agents including how they handle calls. Authorized users/evaluators use the forms in the cc: Discover Web Player and Coaching tabs to record scores and comments. Score data collected from the forms is used for reporting.

Before creating a form, CallCopy recommends

- Reviewing this document to understand what types of questions and responses can be used.
- Writing the evaluation questions, responses, and possible points in a document. This approach allows users to share the evaluation questions with other managers, and it separates the process of writing the evaluation content from the process of creating the evaluation form.
- Promoting consistent scoring across forms by creating a question points/value schema that is easy to track and used by all form creators.

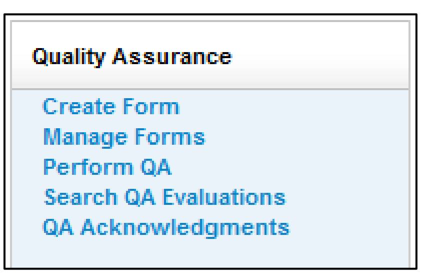
Remember these points when creating a form:

- Save a QA form before switching to another tab. Changing tabs without saving will cause all changes to be lost.
- Do not use the form until you are certain you have added all the sections and questions necessary. Forms cannot be changed after they are used for an evaluation. A new form can be created from a used form.
- Groups can be added to and removed from a used form.

To create a QA evaluation, complete these steps:

1. Name and assign groups to the form.
2. Add a section.
3. Add a question to the form.
4. Add responses to the question. Steps 2, 3 and 4 are repeated as necessary.
5. Move questions and responses as needed.
6. Save the form.

Step 1: Name and Assign Groups



In the cc: Discover Web Portal, click the Coaching tab. The Quality Assurance menu appears on the left side of the page.

In the Quality Assurance menu, click Create Form.

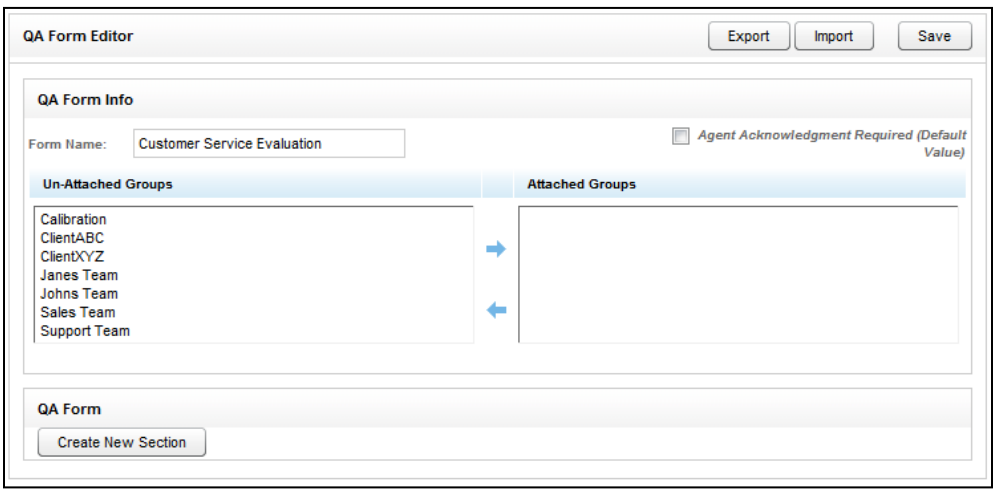
Form Name

In the QA Form Editor, type a unique and descriptive name in the “Form Name” field (50 characters max). In the example below the name is “Customer Service Evaluation.”

Acknowledgement

Select the Agent Acknowledgement Required option if agents must acknowledge that they have reviewed their evaluations. If agents can login to cc: Discover, they will receive evaluation notices on the Home tab. If agents have email addresses recorded in cc: Discover, they will receive notices at that address. If this option is not selected, evaluators still have the option when performing reviews whether to notify agents.

> **Note** This is the evaluation email-notification text: "A Quality Assurance Evaluation has been completed and Assignment Request has been sent to you. Please review your Assignments Inbox." Server administrators can edit this text and the email subject line in the Web.config file’s QAMailSubject and QAMailBody keys. (Go to Program Files > CallCopy > WebPortal.) Changing other settings in this file can negatively affect cc: Discover.



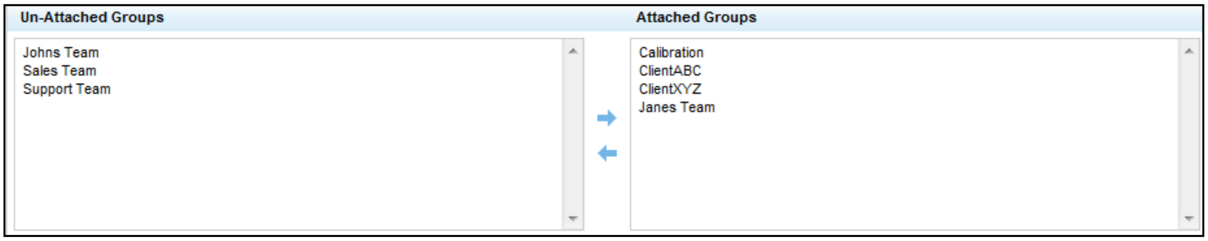
Groups

Groups are the CallCopy groups that administrators create and to which agents can be assigned. They usually represent business organizational units or projects. (CallCopy Groups are covered in the *cc: Discover Web Player Guide* and *cc: Discover Administration Guide*.)

Agents have to be in groups to be evaluated, and forms have to be attached to groups to be used.

In the Un-Attached Groups list, click one or more groups that may use the form, and then click the right arrow. Reversing the procedure un-attaches groups.

Group attachments do not have to be permanent. If a form is no longer needed for a group, the group can be un-attached after evaluations are completed.



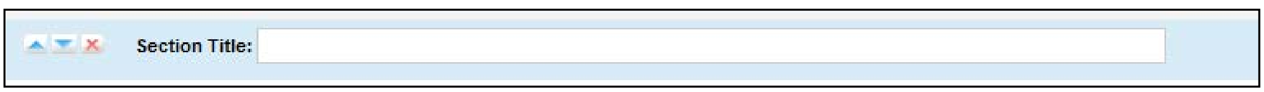
Step 2: Add a Section

Sections organize a form. They usually follow the type of call flow that occurs. For example, for a technical support QA form, logical sections might be “Greeting,” “Soft Skills,” “Use of Desktop Tools,” or “Call Closing.” A form must have at least one section. All questions can be placed in one section.

To create a section, click 

.

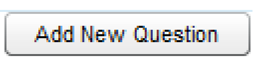
Add a unique name in the Section Title field (50 characters max).



Step 3: Add a Question Type

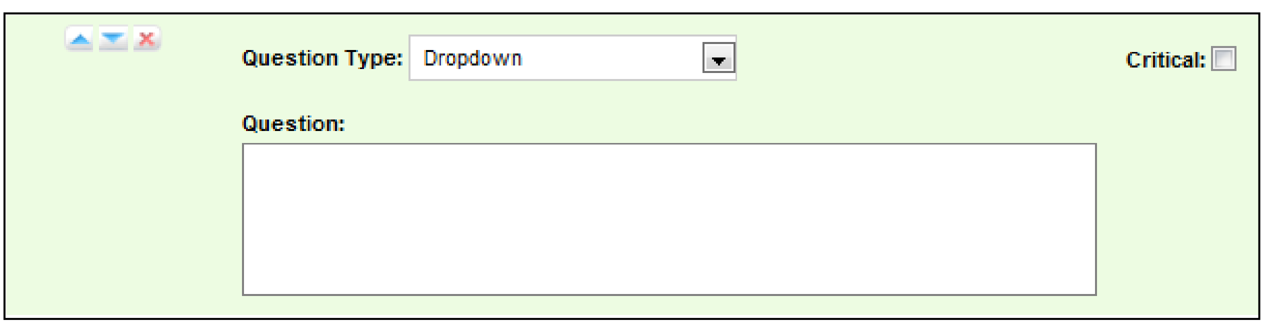
The form will probably need multiple questions. Repeat steps 2 and 3 for each question.

Evaluators use questions to score the call. Questions have responses assigned to them.

To create a question, click 

.

A question text and type object will appear. Type the question text (255 characters max). For example, the question can be “Did the agent use the standard greeting?”



One question on a form can be designated as **Critical**. Responses to and scores on this question are tracked by the Critical Question Detail and Critical Question Summary reports. For example, critical question could track if the agent asked for the customer’s email address to support future marketing efforts.

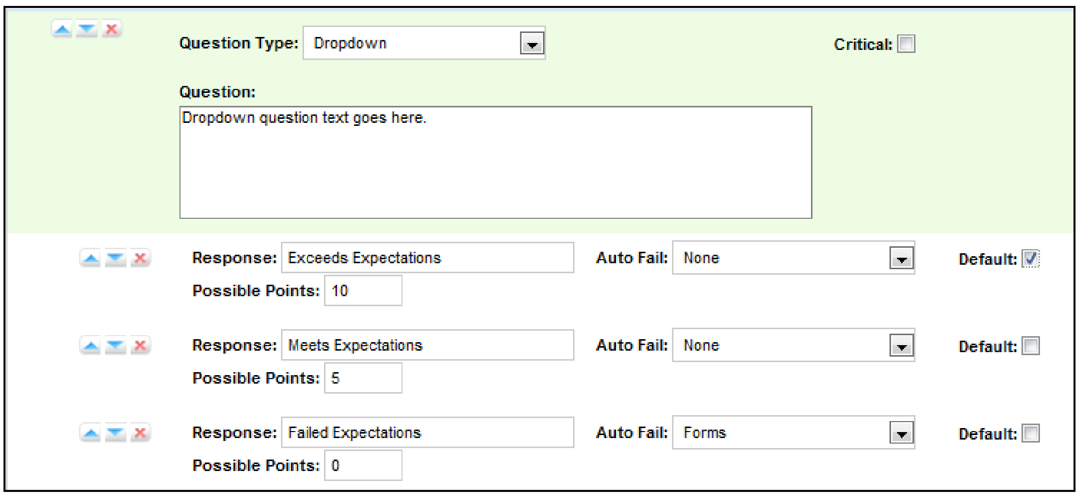
Select the question type. There are five types:

- Dropdown (Scoring)
- Horizontal Radio (Scoring)
- Vertical Radio (Scoring)
- Free Text (Non-Scoring)
- Comment (Non-Scoring)

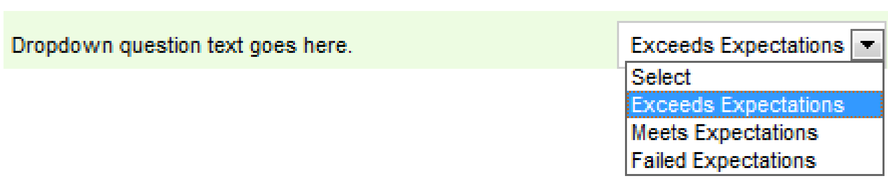
Dropdown

Responses appear in a drop down menu, and the evaluator can select one.

For example, a question with responses ranging from “Exceeds Expectations” to ”Fails Expectations” with point values ranging from ten (10) for “Exceeds Expectations” to zero (0) for “Fails Expectations” would appear in the Form Creator like this:



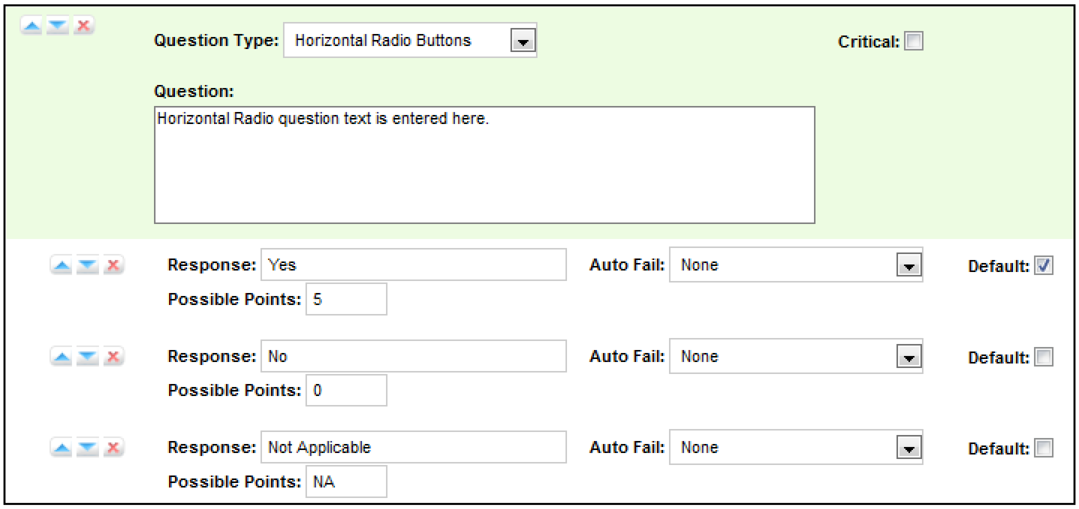
This example will appear like this in the completed form:



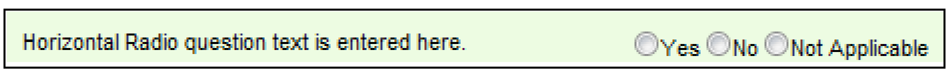
Horizontal Radio

Responses appear on the form as circular Radio buttons displayed in a horizontal line.

For example, a question with responses of “Yes,” “No,” and “Not Applicable” would appear in the Form Creator like this:



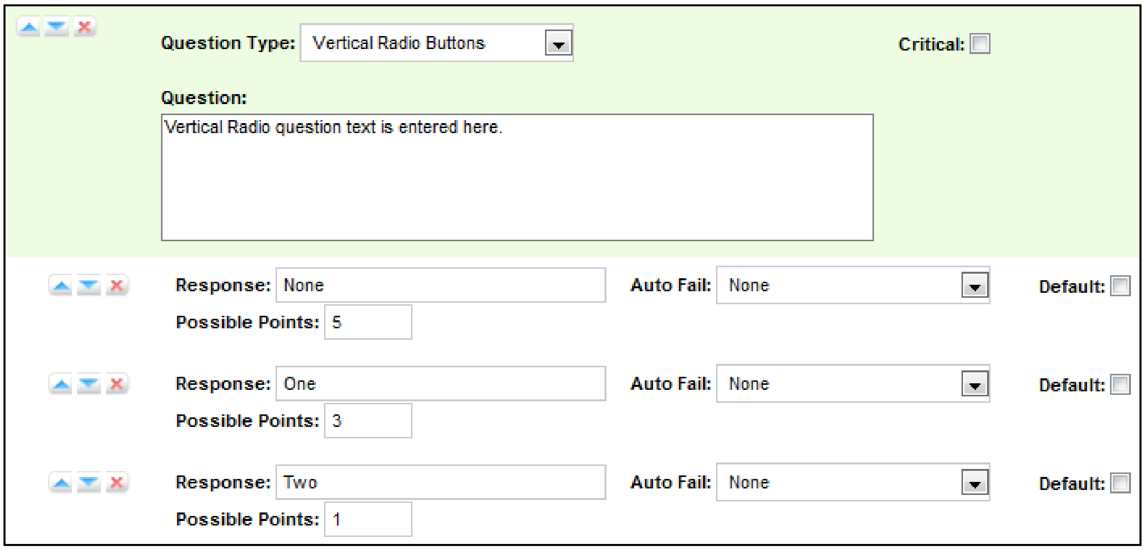
This example will appear like this in the completed form:



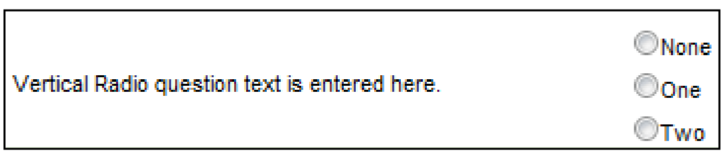
Vertical Radio

Responses appear on the form as circular Radio buttons displayed in a vertical column.

For example, a question with responses of “None,” “One,” and “Two” would appear in the Form Creator like this:



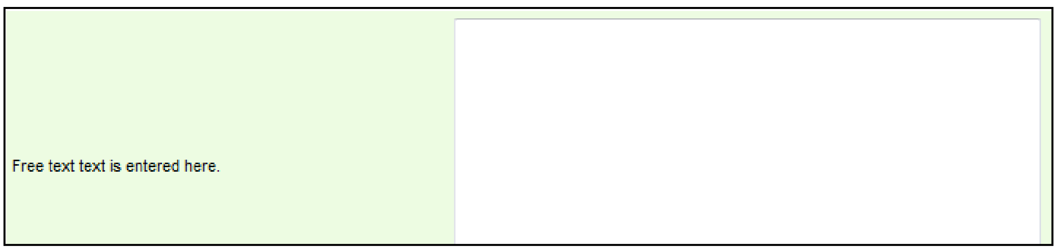
This example will appear like this in the completed form:



Free Text

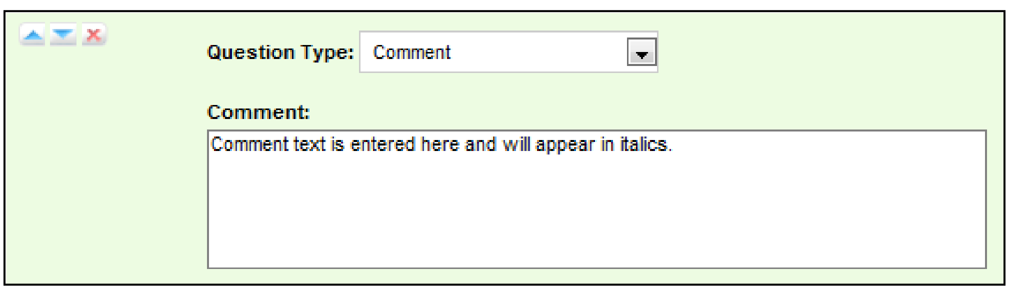
This is general free text field that the evaluator can use to give a descriptive analysis. Point values cannot be associated with a Free Text response, so responses to questions of this type do not apply to the overall percentage score of the form. You will have the option to require a response with Free Text, which requires that at least one character (and up to 1024 characters, including spaces) be placed in the field.

This example will appear like this in the completed form:

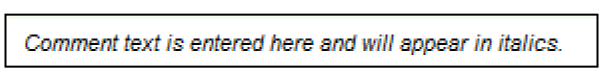


Comment

This is a note that can be left on the form to describe the question or provide extra instructions or details. This is not a question, but rather informative text that appears on the QA form for the evaluator's benefit. Max 220 characters, including spaces.



This example will appear like this in the completed form:



Step 4: Add Responses

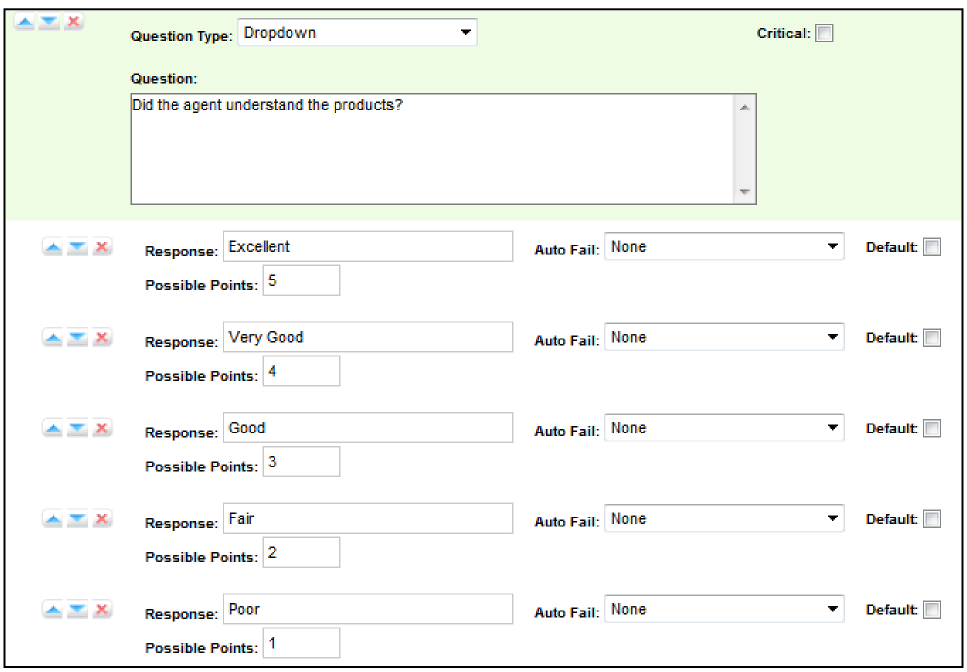
> **Note** Questions can have an unlimited number of responses. You have to repeat this task for each response.

To specify the responses an evaluator can provide, click Add New Response.

Enter an option in the Response text field.

These settings can be used or left blank:

- **Auto-fail:** If the evaluator selects a response designated as Auto Fail, then the agent fails the Section or the entire Form. This setting is typically used to enforce service-affecting protocol, such as security verifications or adherence to scripts with legal disclaimers.
- **Default:** Selecting the Default option causes the response text to appear in the question's response field on the form.
- **Possible points:** This value provides a score for the response. During evaluation and scoring, cc: Discover adds the points scored on each question and divides that value by the total of the highest possible points for all applicable questions. This calculation generates a percentage score for a form. Responses that are specified as Auto Fail MUST have a Possible Points value of 0.

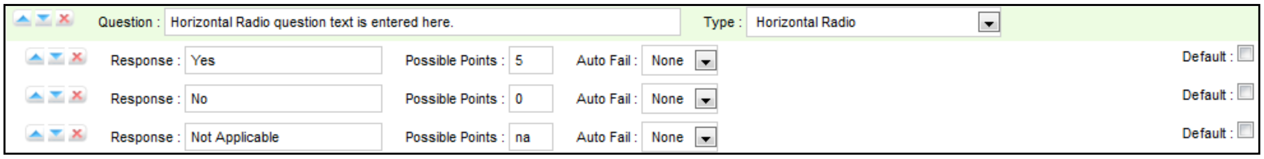


In the example above, the question is set to "Dropdown," so on the form the possible responses will be seen as options in a dropdown menu.

If the response is "Excellent," the evaluation will have five points added to the total score. A response of "Very Good" will earn four points, "Good" will earn three points, "Fair" will earn two points, and "Poor" will earn one point.

If a question may not be applicable to all calls, include a ‘Not Applicable’ response option. If the evaluator selects this option, and enters NA or na in the Possible Points field, the question’s available points will not be counted toward the section or form totals.

> **Note** Not Applicable questions can be assigned a point value. That value can affect the final score because it is counted towards the section and form totals. However, assigning Not Applicable questions the highest possible value will have no affect on the agent’s final score.

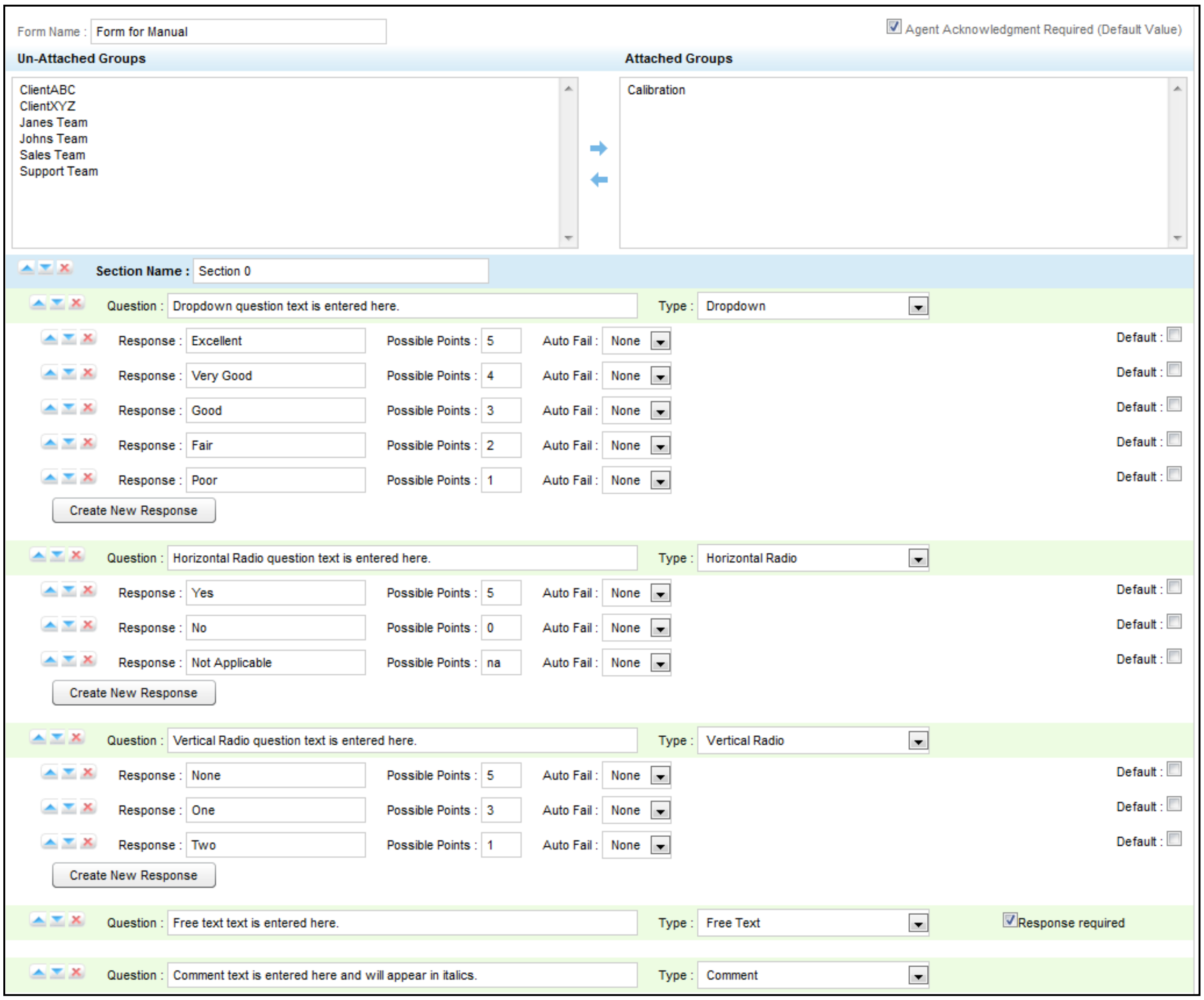


Step 5: Move Form Items

Use the sequence buttons to set the order of QA Form items:

- Moves the selected item up.
- Moves the selected item down.
- Removes the item entirely.

Example Form:

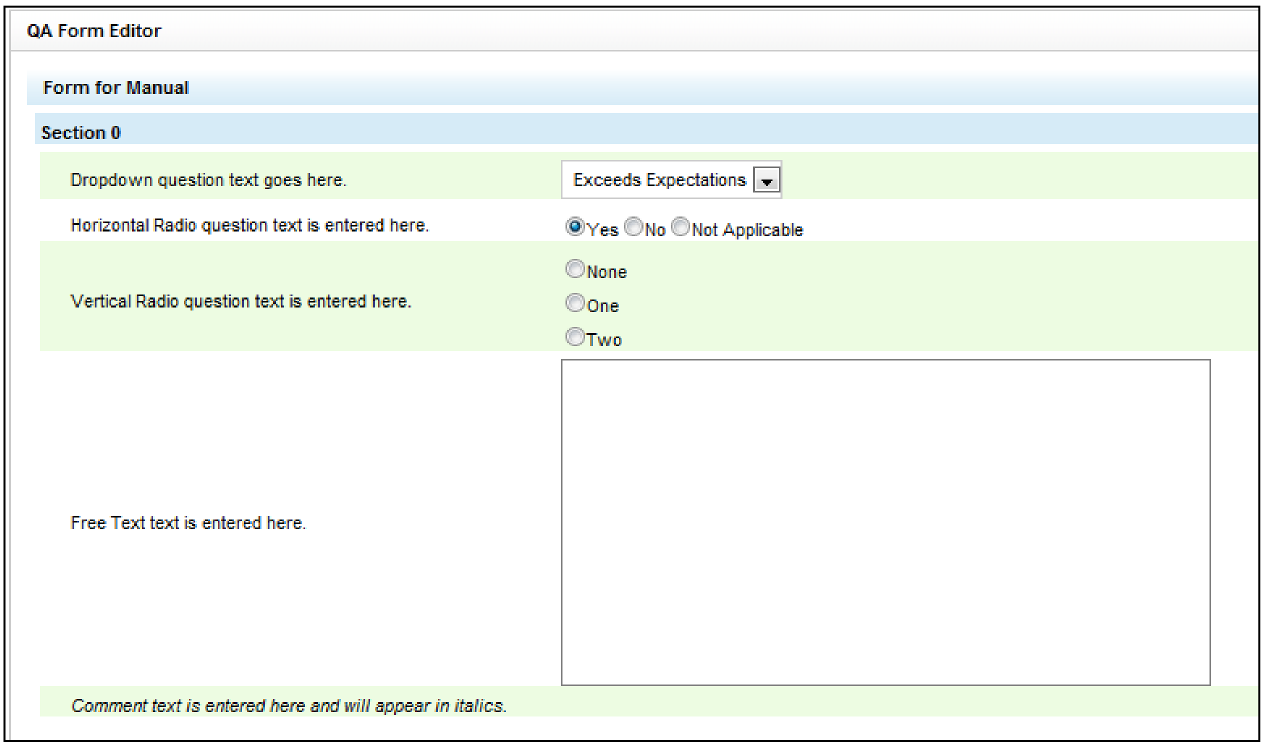


Step 6: Save a Form

To finish building a form, click Save. A preview of the form will appear.

If the form needs changes, click Manage Forms under the Quality Assurance menu. The QA Forms Listing page opens. The form must be retrieved using the Filter. (See the *Manage Forms* section of this document.)

> **Note** You can alter a form once it is saved and before it has been used in evaluating a call, but once the form has been used, it will be locked from editing. Do not use the form until you are certain you have added all the sections and questions necessary.



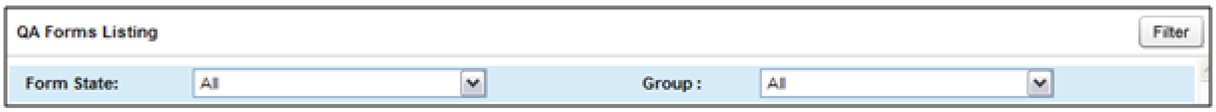
Manage QA Forms

Search for Existing QA Forms

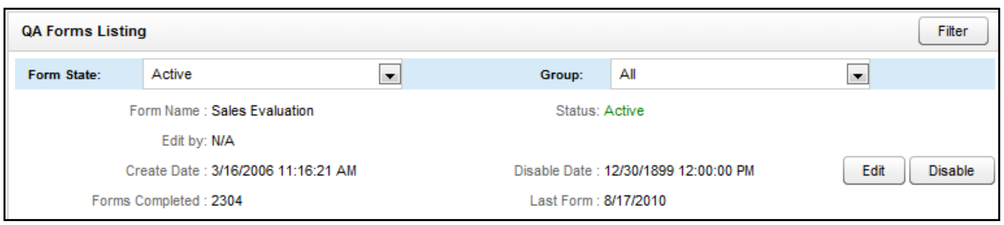
The Manage Forms menu allows you to view Quality Assurance forms already added to the system.

1. On the Coaching tab's Quality Assurance menu, click Manage Forms.
2. On the QA Forms Listing page, select the search criteria.

    - Form State – The options for Form State are All, Active, and Disabled. Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations.
    - Groups – (Optional) Groups are the CallCopy groups that administrators can create and to which agents can be assigned. They usually represent business organizational units or projects.



3. Click Filter. A list of forms appears. Forms are listed by their creation date.



For each form listed, the following summary information is provided:

- Form Name: Name of the form assigned in the QA Form editor.
- Edit by: User name of the last person to change the form.
- Create Date: Date the form was created.
- Forms Completed: Number of times an evaluation has been submitted with this particular form.
- Status: Active or Disable.
- Disable Date: Date the form was last disabled. (If it has never been disabled, the field says '12/31/9999'.
- Last Form: The last time the form was used to evaluate an agent.

Edit Existing Forms

An existing form

- CANNOT be changed if it has ever been used to evaluate an agent. Changing a form would alter any reporting based off of it.
- Can be saved as a new version if it has been used to evaluate agents.

- Can be attached to CallCopy groups regardless of whether it has been used. Once it has been used, it cannot be un-attached from its existing groups. If it has not been used yet, un-attaching a group prevents users from evaluating that group with the form.

Change Group Attachments

To edit an existing form in the QA Form Editor, locate the form and click 

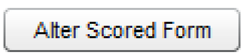
.

If the form has never been used for scoring or only Group attachments need change, make the necessary changes and click Save.

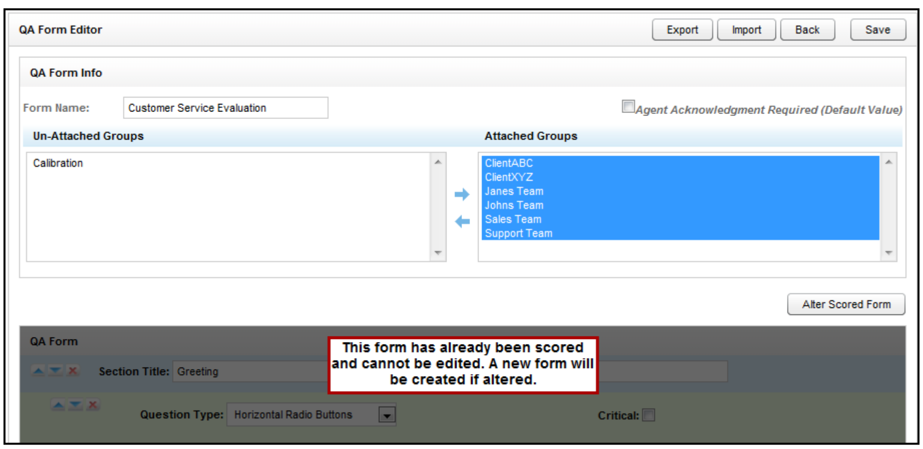
Create a New Form from an Existing Form

You can create a new form from a form that has previously been used to score agents or calls. A new form cannot be created from a form that has not yet been used.

Follow these steps:

1. Locate the form using the QA Form Editor and click Edit.
2. Change the name of the form.
3. Click 

.



4. Make the necessary changes to the form. Click Save.

The new form will not save if a different name has not been entered in the Form Name field.

Disable/Enable Forms

Active forms are available to users who have permissions to perform QA evaluations. Disabled forms are not currently used to perform evaluations. A form can be disabled and enabled an unlimited number of times. Forms cannot be deleted. Disabling a form assures that it is not accidentally used and makes the forms list shorter.

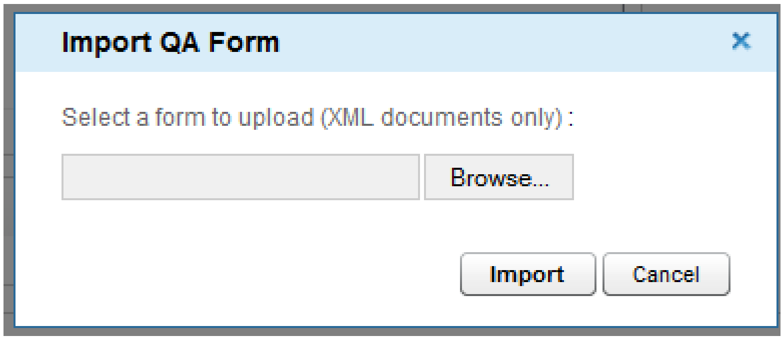
To disable a form, find the form on the QA Forms listing and click Disable. The form's Status field changes from Active (green) to Disabled (red). To enable a form, reverse these steps.

Import/Export Forms

The CallCopy user community provides XML documents that can be imported to create QA forms. These customizable documents serve as templates with standard questions, responses, and point values. Some documents include Healthcare QA Evaluation, Performance Review, Sales Evaluation, and Technical Support Evaluation. (Clients can access the user community through the CallCopy Web site.)

Follow these steps to import an XML document:

1. Download the CallCopy XML form template to your PC.
2. On the Coaching tab, click Create Form in the Quality Assurance menu.
3. In the QA Form Editor, name the form and attach any groups that will be evaluated using the form.
4. Click Import. Click Browse and navigate to the XML file.



5. Select it and click Open. Click Import.
6. The form will be created. Edit it as needed and click Save.

To export an existing form as an XML document, click Manage Forms. Find the form and click Edit. When the form opens, click Export. Save the form, making sure that it is saved as File Type XML.

Perform Evaluations

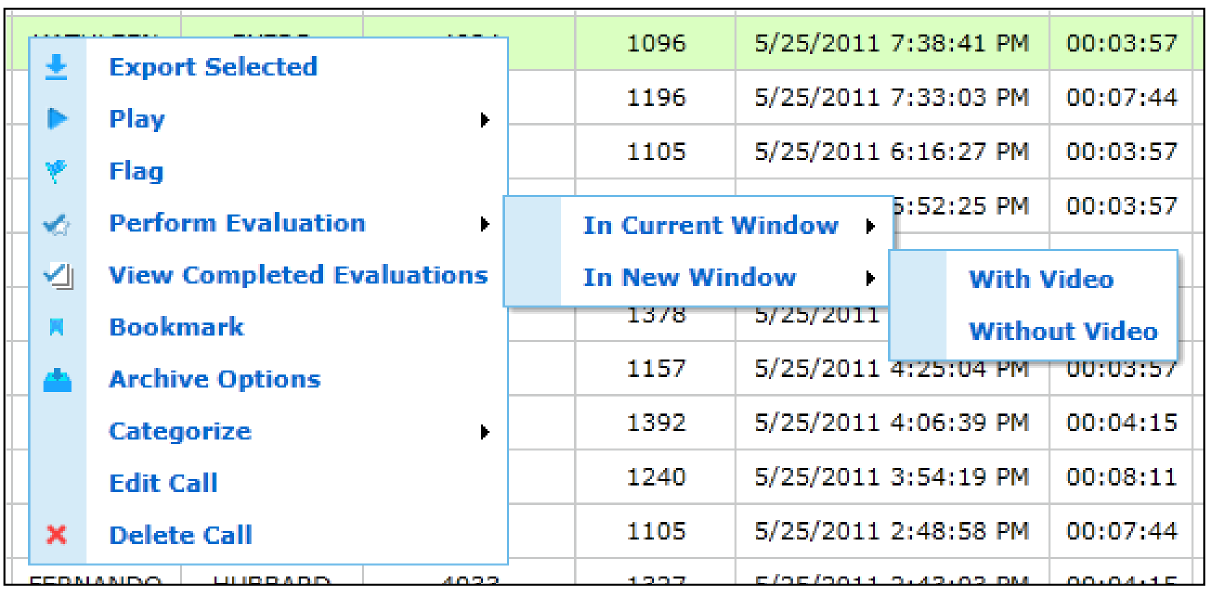
To perform QA evaluations, a user must have Coaching Permissions, access to the CallCopy group attached to the QA form used for the evaluation, and permissions for the cc: Discover Web Player.

These permissions are set by the cc: Discover administrator and explained in the *cc: Discover Administration Guide*.

Evaluate a Call Record

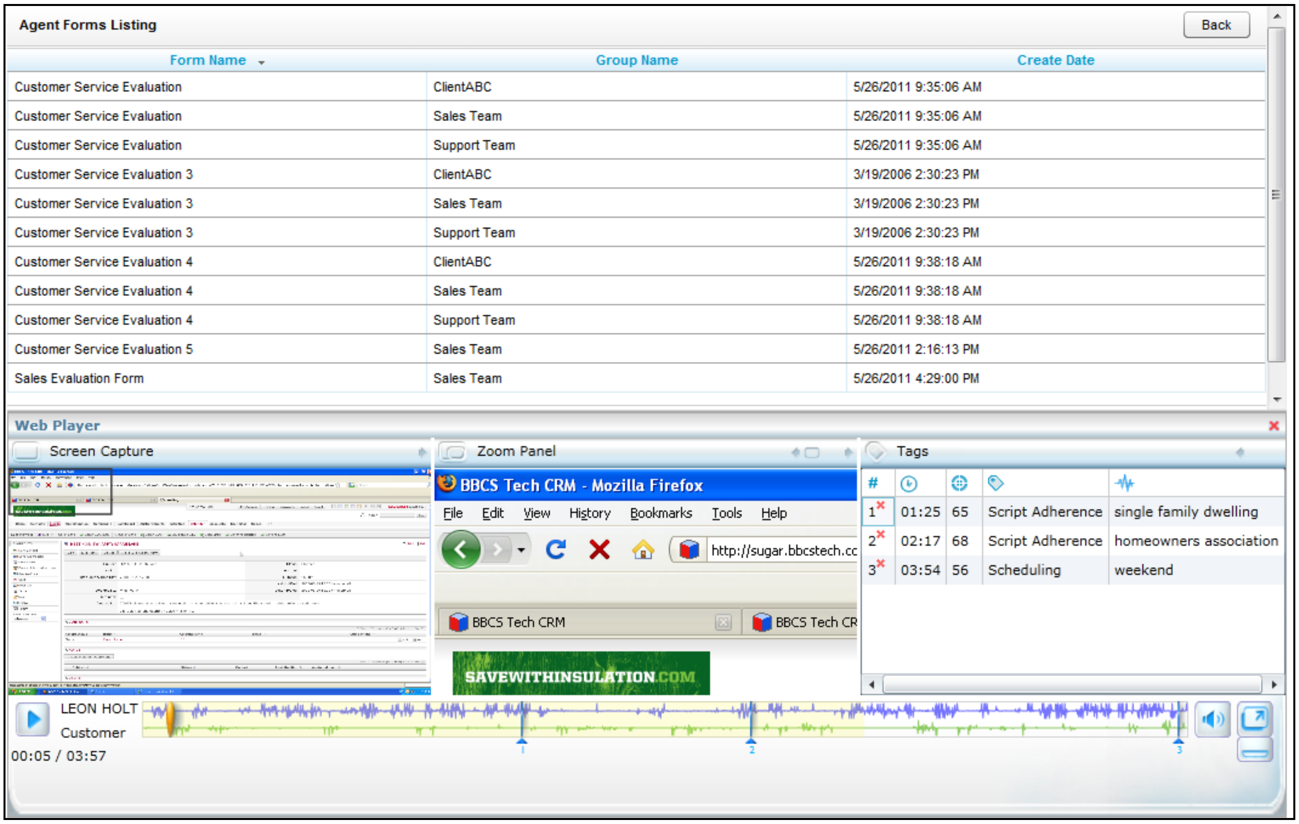
Call record evaluations are done on the cc: Discover Web Player tab.

1. Select the calls to be evaluated using the filtering tools.
2. Click a record. Then right-click it and select the Perform Evaluation option from the Context Menu.
3. Select whether you want the web player to open up in a standalone window or at the bottom of the pane. Also select whether you want the web player to display video (i.e., screen capture information) if it is available.



4. A listing of the QA forms attached to the CallCopy Group(s) associated with the record will appear. Double-click the form you want to use to score the recording. The form will appear in the window.

   Note The agent who conducted a call may be in multiple groups, and one form may be attached to several groups. Therefore, the same form may be available under several different Groups. Make sure you select the form with the appropriate Group. Form and Group selections will affect reporting.

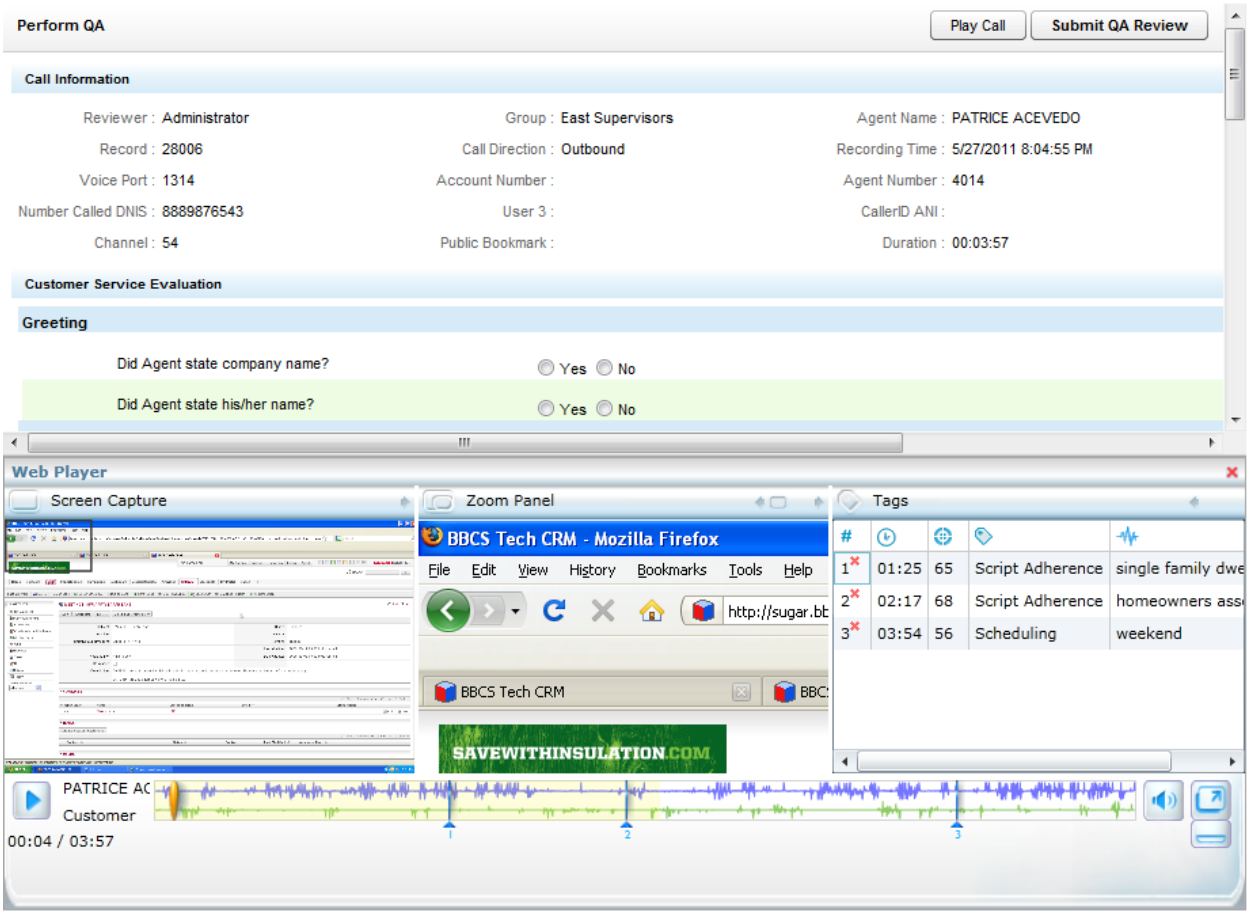


5. Review the form to see what items are being evaluated.
6. Use the playback controls to review the audio and/or video content. You can use the playback controls as needed to pause, fast forward, or rewind the recording to help in your evaluation.

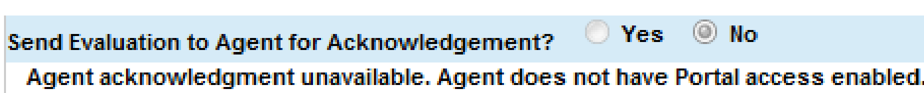
7. Enter information into the QA form while reviewing the call record.

   Note A  appears besides responses that were specified Auto-fail by the form creator.

   Note An evaluation's score appears in the lower-right page corner: Total : 67.00/ 140.00 (47.86 %).



8. The evaluation can be sent to the agent for review and acknowledgement. If the Agent does not have access to the cc: Discover Web Portal, this option is not available.



9. When you have completed the QA form, click Submit QA Review.

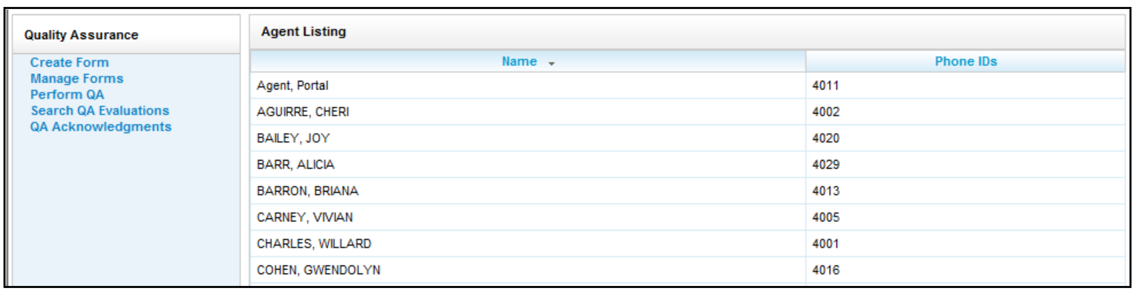
Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the *Review QA Evaluations* section of this guide.

Evaluate an Agent

QA forms for evaluating agents' non-call work are scored on the Coaching tab.

1. In the Quality Assurance menu, click Perform QA.

2. The Agent Listing shows all the agents you can evaluate. Double-click the agent to be evaluated.

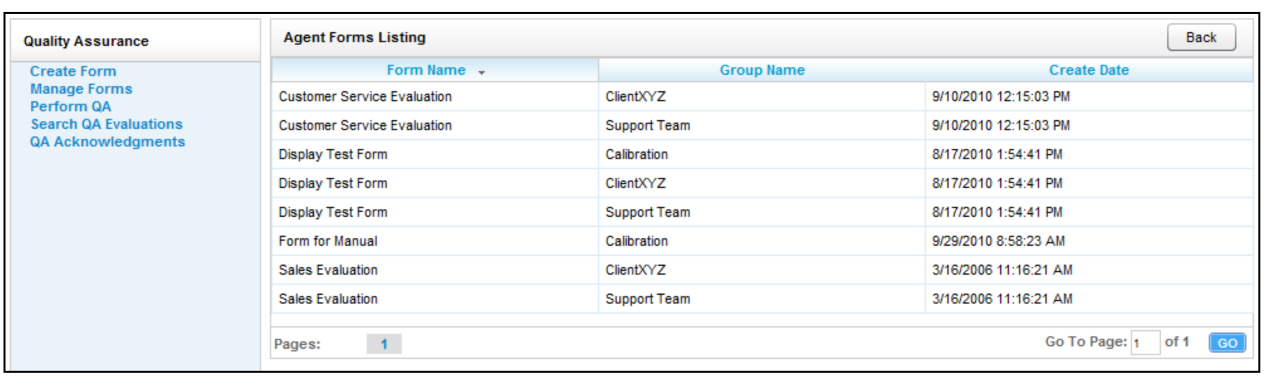

Quality Assurance
Create Form
Manage Forms
Perform QA
Search QA Evaluations
QA Acknowledgments

Agent Listing

Name	Phone IDs
Agent, Portal	4011
AGUIRRE, CHERI	4002
BAILEY, JOY	4020
BARR, ALICIA	4029
BARRON, BRIANA	4013
CARNEY, VIVIAN	4005
CHARLES, WILLARD	4001
COHEN, GWENDOLYN	4016

3. The Agents Forms Listing shows all the active QA forms attached to groups of which the selected agent is a member. Click the appropriate form.

   Note Make sure you select the form with the appropriate Group. Form and Group selections will affect reporting.


Quality Assurance
Create Form
Manage Forms
Perform QA
Search QA Evaluations
QA Acknowledgments

Agent Forms Listing — Back

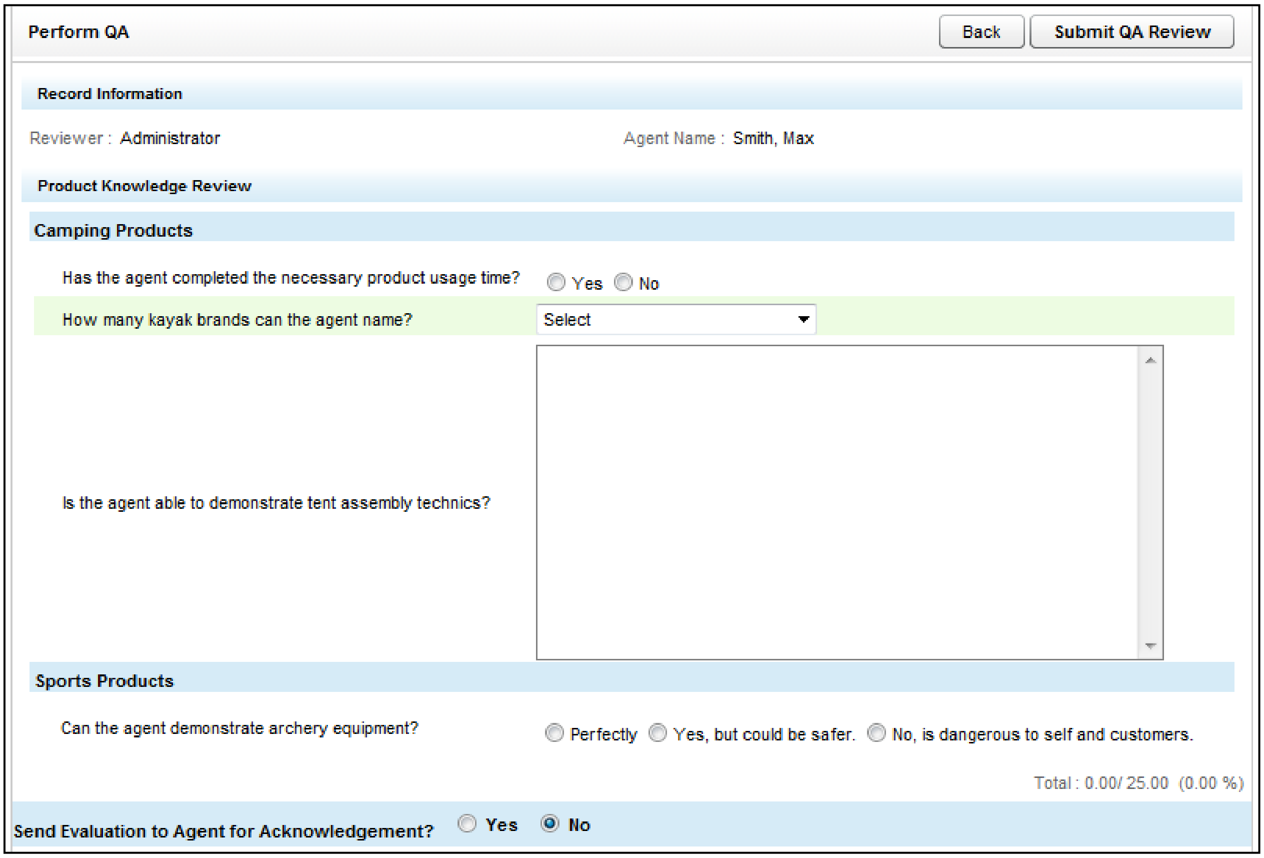
Form Name	Group Name	Create Date
Customer Service Evaluation	ClientXYZ	9/10/2010 12:15:03 PM
Customer Service Evaluation	Support Team	9/10/2010 12:15:03 PM
Display Test Form	Calibration	8/17/2010 1:54:41 PM
Display Test Form	ClientXYZ	8/17/2010 1:54:41 PM
Display Test Form	Support Team	8/17/2010 1:54:41 PM
Form for Manual	Calibration	9/29/2010 8:58:23 AM
Sales Evaluation	ClientXYZ	3/16/2006 11:16:21 AM
Sales Evaluation	Support Team	3/16/2006 11:16:21 AM

Pages: 1 Go To Page: 1 of 1 GO

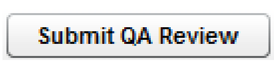
4. Enter responses for each question on the form.

   Note A  appears besides responses that were specified Auto-fail by the form creator.

   Note An evaluation's score appears in the lower right corner of the page.



5. The evaluation can be sent to the agent for review and acknowledgement. If you select 'Yes', an Evaluator's Notes box for comments and directions opens. If the Agent does not have access to the cc: Discover Web Portal, this option is not available.

6. When you have completed the QA form, click 

.

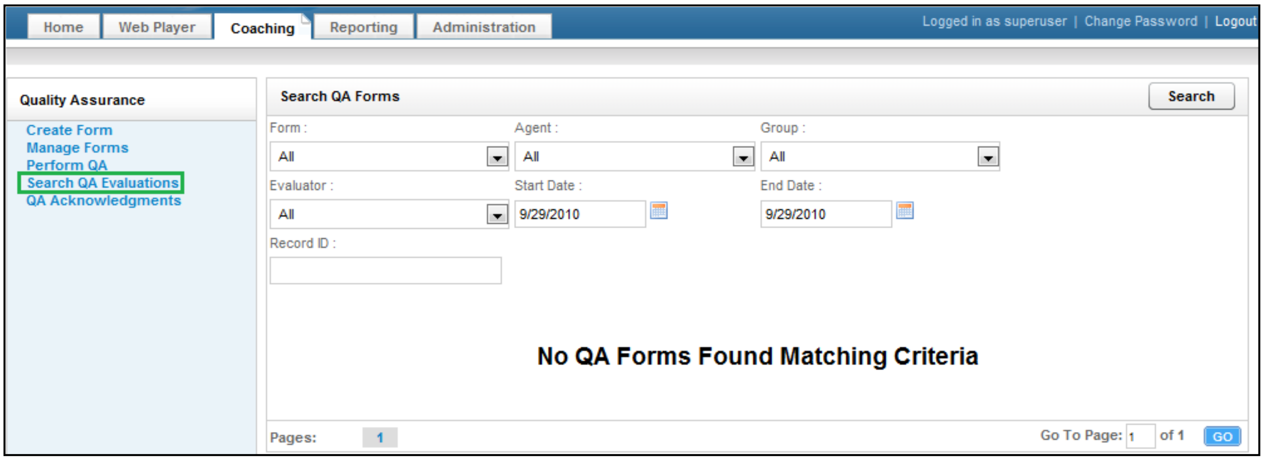
Messages will appear indicating if the evaluation was saved successfully or requires additional information. Follow the instructions in the message as necessary. When the evaluation is saved, review options will appear at the top of the page. These options are explained in the *Review QA Evaluations* section of this guide.

Review QA Evaluations

This section is for users who are members of a group and have permissions to view, edit, and delete completed evaluations.

Locate Completed Evaluations

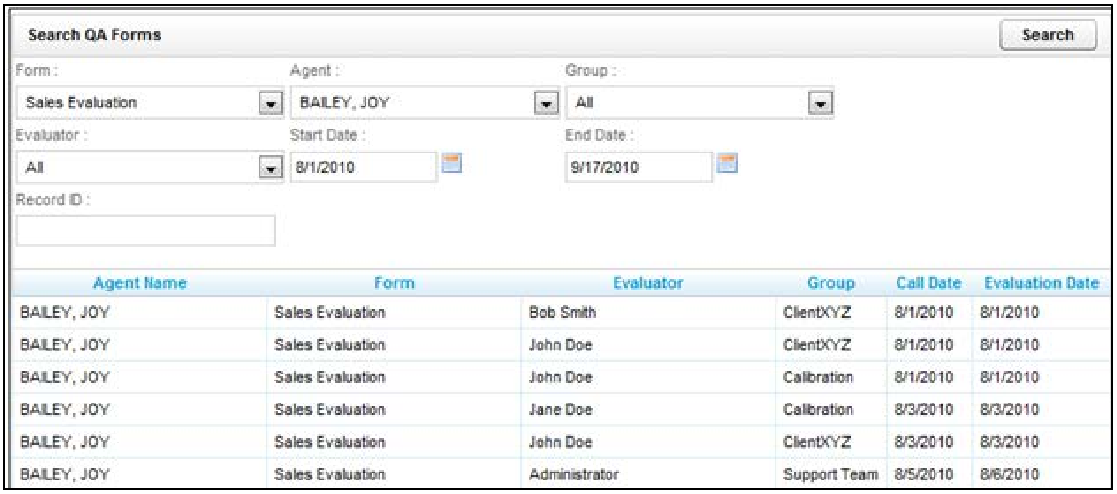
1. On the Coaching Tab, in the Quality Assurance menu click Search QA Evaluations.



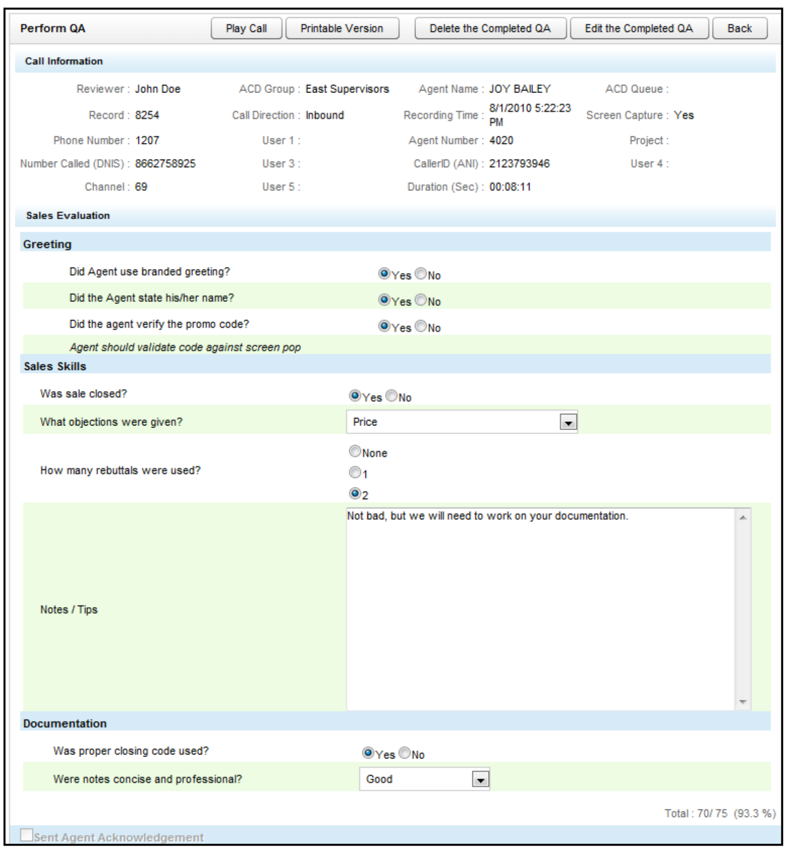
2. Enter a combination of search criteria:

- **Form:** Select a particular form or all forms.
- **Agent:** Select a particular agent or all agents.
- **Group:** Select a particular group or all groups.
- **Evaluator:** Select a particular evaluator or all evaluators.
- **Start Date:** Pick a starting date as part of a date range.
- **End Date:** Pick an ending date as part of a date range.
- **Record ID:** Number identifying the completed QA evaluation.
- **Recording ID:** Find a completed evaluation for a call based on the call's record ID number in the system.

3. Once you have made your appropriate selections, click Search. A list of evaluations matching the criteria appears in the window.



4. To access a particular evaluation, double-click it. The completed evaluation opens in the window.



Additional Functions

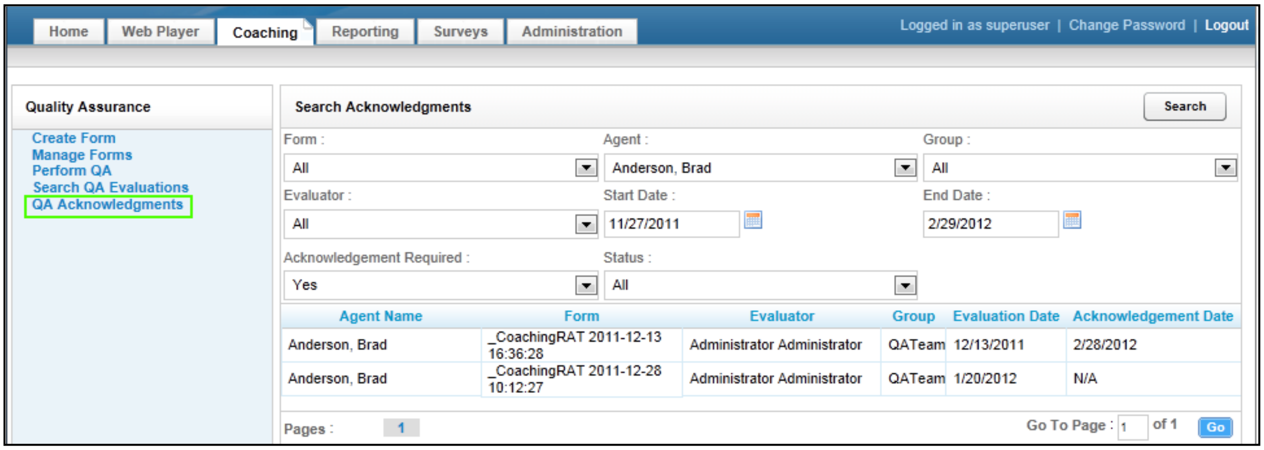
Based on your individual permission settings, you can perform several actions on a scored evaluation.

- **Play Call:** Plays the call for which this particular evaluation was completed.
- **Link for Completed QA:** Displays the URL of an evaluation in a popup window. This option is useful if referencing a completed QA in an email.
- **Printable Version:** Opens the completed evaluation in PDF format that you can then save or print.
- **Delete the Completed QA:** Deletes the completed evaluation from the system. Very few users should be given this permission. Deleting or editing completed QA forms affects reporting.
- **Edit the Completed QA:** Allows you access to update the form with any necessary changes. After your edits are complete, click the Submit QA Button to update the evaluation. The original version of the evaluation is not retained in the system. Deleting or editing completed QA forms affects reporting.

QA Acknowledgements

If, during your evaluation of agents, you require them to acknowledge their completed forms, they will review and acknowledge the evaluation on the Discover Home tab. (See the *cc: Discover Web Player Guide* for additional information.)

You can report on who has or has not acknowledged the evaluation on the Coaching tab. In the Quality Assurance menu, click QA Acknowledgements.



This will allow you to search for a completed evaluation using a combination of search criteria:

- **Form:** Allows you to select a particular form or all forms.
- **Agent:** Allows you to select a particular agent or all agents.
- **Group:** Allows you to select a particular group or all groups.
- **Evaluator:** Allows you to select a particular evaluator or all evaluators.
- **Start Date:** Allows you to pick a starting Evaluation Date range. The start date will automatically default to a week prior to today's date.
- **End Date:** Allows you to pick an ending Evaluation Date range. The end date will automatically default to today's date.
- **Acknowledgement Required**: Allows you to search for evaluations based on whether the QA form creator required agent acknowledgement. If set to 'No', then evaluations whose form did not require an acknowledgement but whose evaluator selected to require an acknowledgement are found.
- **Status:** Allows you to search for Unacknowledged or Acknowledge Evaluations.

Click the Search button to generate your list of acknowledged or unacknowledged evaluations, based on your selection criteria.

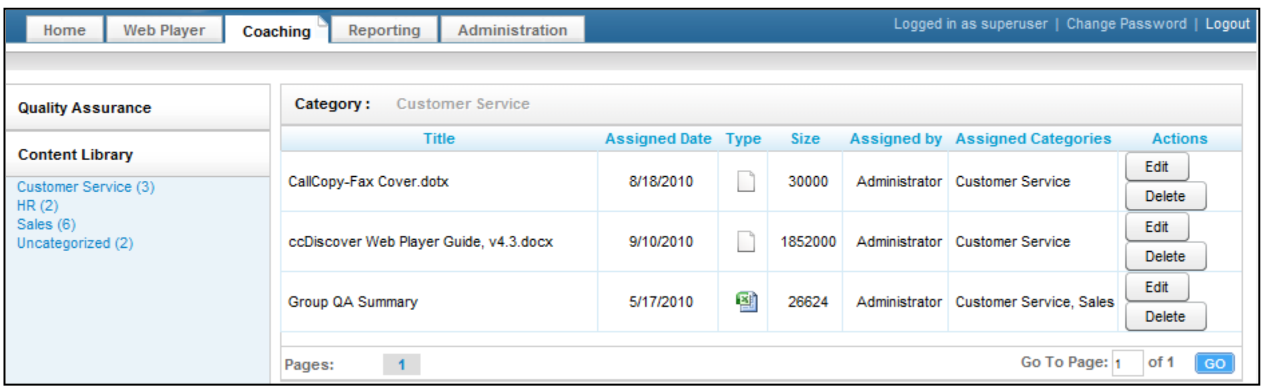
Content Library

The Content Library enables users to upload files that can be shared with agents who have access to the cc: Discover Home tab. Files that can be uploaded include Word files, PDFs, Web pages, QA evaluations, and calls exported from cc: Discover.

See the *cc: Discover Web Player Guide* for how to use the Home tab.

Tip: *Distribute the cc: Discover manuals to the appropriate users via the Content Library. Doing this ensures that users always have access to the manuals when they are in the application, and it can reduce the number of questions to system administrators. Separate categories can be created for different types of users, such as Help for agents or supervisors and Admin Help for system administrators.*

The Content Library appears on the Coaching tab. Documents are organized into Content Categories. The number of items in each category appears inside the parenthesis to the right of the name.



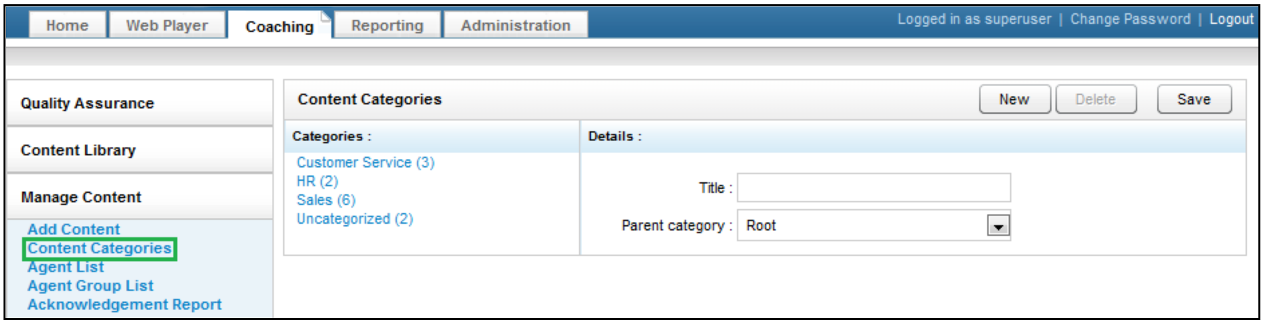
You will see:

- **Title:** The name of the file.
- **Assigned Date:** The date the content was uploaded and assigned
- **Type:** Displays graphically the file type (Word, Excel, Power Point, etc.)
- **Size:** The size of the document/content
- **Assigned By:** The user who uploaded and assigned the content
- **Assigned Categories:** All of the categories that this document/content is assigned to
- **Actions:** Edit allows you to change content assignments. Delete removes the content from the library.

Content can be accessed by double-clicking the title of the content/document. You will be prompted to Open or Save the file.

Manage Categories

Content Categories allow the user to organize and assign library content.



To create a new Category, on the Coaching tab, in the Manage Content menu, click Content Categories. In the Details section, enter a name for the category in the Title field. In the Parent Category list, select an existing category if you would like the new Category to become a child of it. Otherwise, select the Root option from this list.

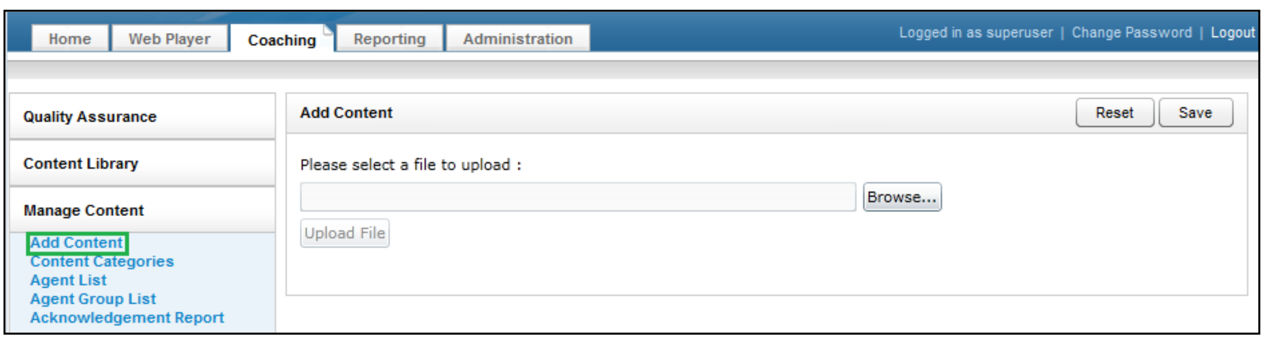
To delete a category, select it from the Categories list, and click **Delete**.

To edit a category, select it from the Categories list. Edit the title or parent category and click **Save**.

Add and Assign Content

Follow these steps to add or assign content in the library:

1. Click the Add Content link under the Coaching tab on the Manage Content menu.



2. Click the 

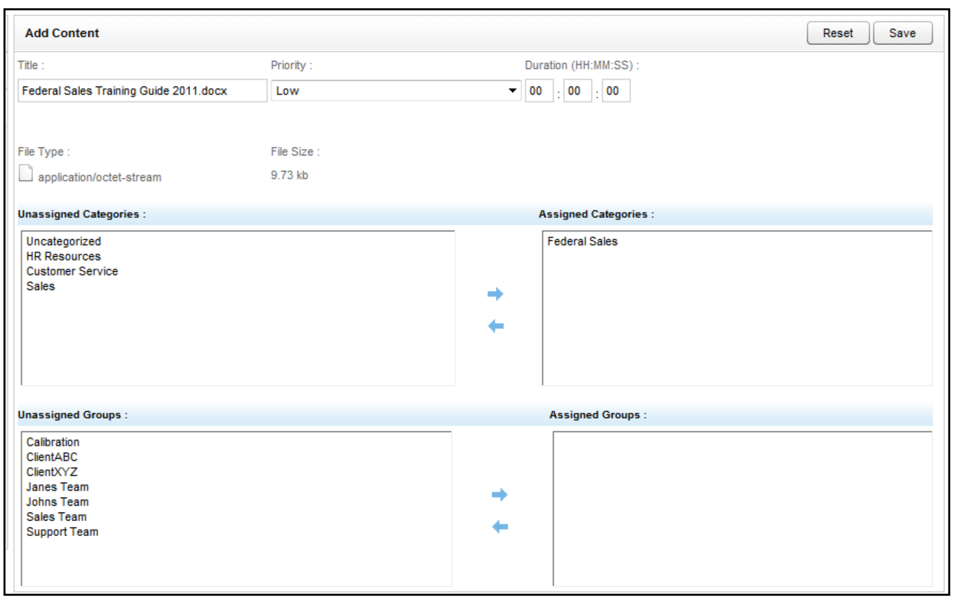
button and navigate to the item you want to upload into the library.

3. Once your file is populated in the upload field, click the 

button. You will be taken to the property and assignment page. From this page you can:

   - **Title:** This value is the name of the uploaded file. The title in the library can be different.
   - **Priority:** Agents see this value when they see the content on the Home tab. If agents have multiple items to review, this value communicates the importance of this item.
   - **Duration:** An estimate of how long it takes to review a document.
   - **Unassigned/Assigned Categories:** In order to be accessed by agents, library content must be assigned to content Categories or CallCopy groups. Any agent in the assigned category will inherit the content.
   - **Unassigned/Assigned Groups:** These are CallCopy groups created by system administrators.

   File type and File size are identified by the system and cannot be changed.



4. Click Save. A confirmation message appears if the save was successful.

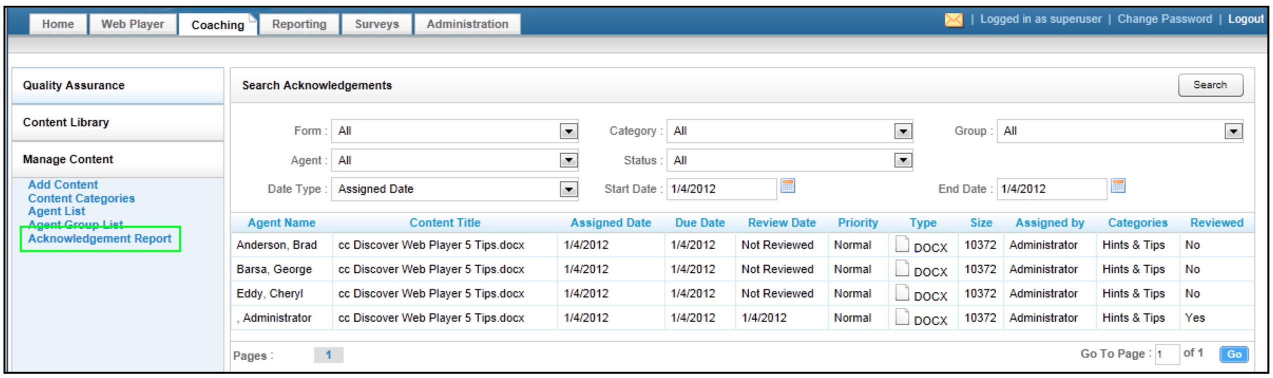
Agent List/Agent Group List

The Agent List shows each agent, the number of groups to which he belongs, and the number of documents assigned to the agent. This information can be used The Agent Group List shows each CallCopy group to which agents can be assigned and the number of agents in that group.

This information may be useful for tracking that total docs assigned to an agent who is part of multiple groups or if loading multiple documents for a group.

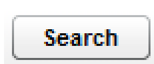
Content Acknowledgement Report

If you have assigned content to an agent, you can report on who has or has not reviewed/acknowledged that assigned content. Go to the Acknowledgement Report link under the Coaching tab, in the Manage Content area.



This will allow you to search for a completed evaluation using a combination of search criteria:

- **Form:** Allows you to select a particular piece of content or all content.
- **Category:** Allows you to select a particular category or all categories.
- **Group:** Allows you to select a particular CallCopy group or all groups.
- **Agent:** Allows you to select a particular agent or all agents.
- **Reviewed Status:** Allows you to select all statues, pending status, or reviewed status.
- **Date Type:** Allows you to select from the Assigned Date, which is the date the content was uploaded.
- **Start Date:** Allows you to pick a starting date range. The start date will automatically default to today's date.
- **End Date:** Allows you to pick an ending date range. The end date will automatically default to today's date.

Once you have selected criteria, click 

to generate your report.

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit www.callcopy.com.