Genesys Engage On-Premises Use Cases

Genesys Quality Management (EE09) for Genesys Engage on premises

5/16/2026

Improve employee performance with quality management

What's the challenge?

Businesses need to evaluate the quality of their interactions to identify opportunities for improvement, but it's not efficient to evaluate every single interaction. You need a way to distinguish important from routine interactions, and then generate the results in a consistent and automated manner.

What's the solution?

Genesys Quality Management includes strategic metadata with each recorded interaction to pinpoint which are most valuable to evaluate, and then uses predefined reports to analyze and present those results for a clear and consistent view of where you're strong and where you could improve.

Other offerings:

PureConnect

Contents

- 6.2 Document Version

Use Case Overview

Story and Business Context

Quality Management (QM) helps organizations move beyond random sampling to gain a deeper understanding of its agent/customer interactions by monitoring, evaluating, and studying customer interactions. Quality Management not only helps organizations identify agents who underperform, but it also helps them identify the root cause of an agent's behavior.

By understanding agent performance and productivity at a granular level, Quality Management offers insight into customer interactions and ways in which agents can improve them. That is, Quality Management offers insight that can increase employee productivity, resolve future customer disputes and subsequently enhance customer service. It enables you to ensure consistent and professional service.

The QM module is a tool that helps organizations improve agent productivity as well as customer satisfaction. The key features such as Forms Manager and Evaluations Manager can be utilized for evaluating agent productivity, as well as targeted agent training. These features allow easy detection and training of agents who do not adhere to compliance or specified procedures.

Quality Management key features include:

Forms Manager: Enables you to create feedback forms to use when evaluating your contact center agents.

Evaluations manager: Enables you to create evaluations to monitor your agent's productivity and efficiency.

Evaluation Sessions: Provides a list of existing evaluation sessions.

Reports: Enables you to monitor agent or evaluator progress using predefined reports, identify areas for training, and calibrate evaluator responses to limit evaluation variations.

Use Case Benefits*

The following benefits are based on benchmark information captured from Genesys customers and may vary based on industry, lines of business or Genesys product line:

Use Case Benefits	Explanation
Improved Customer Experience	Deliver a better customer experience with tools that make the process of finding the root causes of low NPSs more efficient and effective as the entire conversation, including self-service and transfers, may be recorded and archived for later review (the agent manually transcribes only critical fields). The result is less time spent handling the call (AHT) and after-call-work (ACW), improved accuracy and customer care, and more effective training and compliance management

Use Case Benefits	Explanation
Improved Employee Satisfaction	Develop agent expertise and knowledge through coaching resulting in performance improvement and increased job satisfaction
Improved First Contact Resolution	Find the root causes of low FCRs efficiently and effectively through targeted evaluations
Increased Revenue	Improve Sales or Collections by identifying the critical agents skills within interactions that lead to successful outcomes and subsequently train and coach lower performers through targeted or ad-hoc evaluations with Genesys Quality Management.
Reduced Handle Time	Conduct more targeted evaluations, making the process of finding the root causes of high handle time more efficient and effective through native integration into the Genesys Customer Experience Platform

Summary

After a call is recorded, it's time to perform a quality evaluation by choosing one of the following two methods:

- Ad-Hoc Evaluations - allow users to pick and choose which calls they want to evaluate, along with any relevant evaluation forms.
- Targeted Evaluations - leveraging any Genesys metadata, users can predefine which calls needs to be evaluated and by whom within a configurable timeframe.
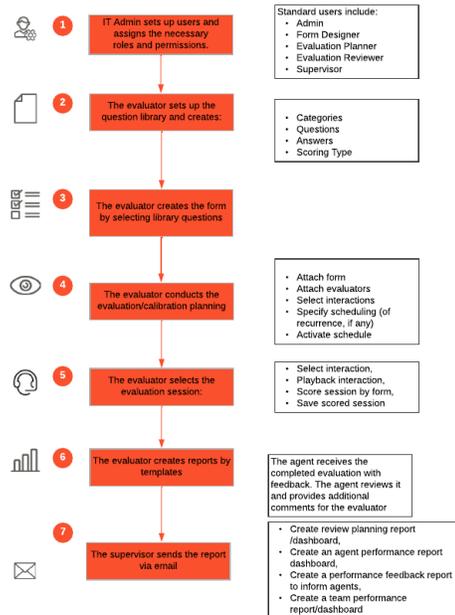
Use Case Definition

Business Flow

Business flow

Business and Distribution Logic

Business Logic

Details of the business flow described in the previous chapter depend on how the system is set up for your environment and how your team defines the details. This section describes the tools used to define the business logic.

Form Manager

With the Quality Management - Forms Manager you can create and manage forms that enable

Business Flow Description Business flow steps to follow are attached to defining how measurement will be targeted to come to an efficient scoring and planning of review sessions and have a proper display setup of performance results and review progress made.

1. Set up Users.
    The IT Administrator sets up user roles and a related set of permissions. Standard users include:

    *   Admin

    *   Form Designer

    *   Evaluation Planner

    *   Evaluation Reviewer

    *   Supervisor

2. Set up Question Library:
    The form designer sets up a question library to be used in evaluation forms and creates the following:

    *   categories

    *   questions

    *   answers

    *   scoring type

3. Create Form by selecting Library questions.

    *   The form designer creates a form by selecting the appropriate library questions, together with the model of scoring where low performers and high performers can be identified within a certain threshold.

4. Plan Evaluation and Calibration.
    The evaluation planner plans review sessions for CC sites, groups, or individual agents. He decides how many interactions need to be scored per month/week/day, setting a quota where it is recommended to start small to test reviews, such as two calls per agent/week based on metadata criteria (such as longer than 3 minutes) and concerning a specific call reason. Keep in mind that random is not possible and needs an interaction

evaluators to provide feedback about a specific agent.

That is, when a form is included in an evaluation, it becomes part of a process that helps you identify how an agent is functioning, and subsequently what the agent needs to do in order to maximize your business goals and customer satisfaction.

Evaluation Manager

Quality Management evaluations are the best way to evaluate and improve agent behaviors that support your business goals. They drive the behaviors that promote a specific agenda by enabling you to assess how well your agents are performing during customer interactions.

Evaluation Sessions

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, SpeechMiner Quality Management evaluators receive a list of evaluation sessions that they must fill out according to a configurable schedule. A completed evaluation session provides a view into how an agent communicates with consumers. Such evaluation sessions provide consistent and regular feedback that helps surface insightful reports, comments, and suggestions that can lead to formal skills training and action plans to improve an agent's performance. In addition, ad-hoc evaluations can be performed by selecting individual interactions.

Action Items creates an environment where evaluators and agents can communicate, leveraging alerts informing when evaluations are completed or acknowledged.

Reports

Reports are summaries and analyses of interaction, speech, and external metadata. You can generate reports for analysis, view report details and status, and share the data with users throughout the enterprise. You can view reports in your browser, print them, or send them via email. To help you monitor your business, SpeechMiner offers a wide range of standard reports that can be customized to better suit your needs. Depending on the type of report, the results may be presented as lists or data and/or in graphic form. In some reports, you can drill down to see additional details.

Parameters and Business Rules common flow

The following needs to be set up to support the Quality Management process:

criteria set up for each planned review. Detailed tasks include:

- Attach Forms.
- Attach Evaluators.
- Select interactions.
- Specify scheduling (of recurrence, if any).
- Activate schedule.

5. Select an evaluation session.

The evaluation planner or supervisor proceeds with the actual reviews for the teams he is allowed to review and give feedback for, insight in how many reviews need to take place and what has been done, and what is in progress or still pending. Detailed actions include:

- Select interaction.
- Play back interaction.
- Score session.
- Save scored session.

6. Create an action item.

- The evaluator sends out an action item containing the completed evaluation, along with any relevant feedback to the agent.
- Agent reviews action item.
- Agent reviews evaluation received, providing any additional comments back to the evaluator.

7. Using the available report templates/ widgets, the evaluator sets up a performance view to monitor the progress of team performance and individual agent performance views.

1. IT Admin to set up Users, Role-based access rights, and additional metadata configuration.

2. Set up a Question Library:

   • Define the measurement based on categories.

   • Define question types (such as multiple choice, yes/no) and number of questions.

   • Define actual answers, and the number of answers.

   • Define Weighting of the scoring type.

3. Create Form: Define name, description, create categories, and insert questions from Library.

4. Plan Evaluation and Calibration:

   • Choose New Evaluation Type: Distribution, Calibration, Shared

   • Interactions - date range, metadata, agents, ixn type, ixn duration, number of ixns for evaluation

   • Scheduling - one time, or recurrence (by minute, hour, days, weeks, months,) schedule series expiry (after minute, hour, days, weeks, months.) Date range of start and finish of scheduling.

   • Activate schedule.

5. Select an evaluation session:

   • Select review session, playback interaction, and score by assigned forms.

   • Save to be included in performance results.

6. Create reports by templates:

   • Select template and user type and assign relevant data.

   • Save to report library or dashboard.

   • Create subscriptions for feedback reports.

Distribution Logic

Creation by Supervisor, Team leaders, Quality Managers to publish reports by subscriptions of feedback by email.

User Interface & Reporting

Agent UI

In case there is need of screen recording (Premise only), the use case is a prerequisite and a desktop client needs to be deployed on each workstation.

Reporting

Real-time Reporting

NA

Historical Reporting

Speechminer report templates enable you to create a dashboard display to address:

- What the actual state of planned review sessions and the remaining target?
- What are the actual scoring results per site/team/agent?
- Is scoring done similarly by reviewers to assure scoring standards?

QM Report templates include:

- Planning/Quota progress report
- Quality Performance report
- Feedback results report to inform agents
- Supervisor Calibration report
- Team comparison

Customer-facing Considerations

Interdependencies

All required, alternate, and optional use cases are listed here, as well as any exceptions.

All of the following required:	At least one of the following required:	Optional	Exceptions
None	**Workforce Engagement** - Genesys Voice Recording (EE07) - Genesys Voice and Screen Recording (EE08)	None	None

General Assumptions

- Recording is set up in full detail and metadata relevancy is sorted out.
- Understanding of the business QA process:
  - Scoring quotas/targets and planning criteria are known.

- Scoring thresholds are known, such as 60% minimum 90% excellent.

- Scoring categories are defined, such as greeting, knowledge, behavior.

- Scoring question types are defined, such as multiple choice and pass/fail.

- Scoring answers follows a business standard like 2,3,4, answers plus free text.

- Preferred output is defined, such as how to display what has been measured.

- Regulatory issues: with every project it is highly recommended to discuss local restrictions related to compliance, data protection, and any special regulations, to make sure that access to interactions and permission to review is understood in full detail.

Customer Responsibilities

Quality management is mainly driven by the Speechminer GUI as business usage related to the QM process of QA Staff and team leads.

- IT Admins use GAX and Cloud administrative UIs.

- Supervisors and Quality Managers use Speechminer.

- Agents use Speechminer and the email client.

Document Version

- Version **v 1.1.2** last updated **May 16, 2026**