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## PureConnect Use Cases

Genesys Quality Management (EE09) for PureConnect

2/7/2025

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## 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:**

Genesys Engage on-premises

## Contents

- [1 What's the challenge?](#)
- [2 What's the solution?](#)
- [3 Use Case Overview](#)
  - [3.1 Story and Business Context](#)
  - [3.2 Use Case Benefits\\*](#)
  - [3.3 Summary](#)
- [4 Use Case Definition](#)
  - [4.1 Business Flow](#)
  - [4.2 Business and Distribution Logic](#)
- [5 User Interface & Reporting](#)
  - [5.1 Agent UI](#)
  - [5.2 Reporting](#)
- [6 Customer-facing Considerations](#)
  - [6.1 Interdependencies](#)

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- 6.2 Document Version

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## 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 the organization to ensure consistent and professional service.

### 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 Agent Competency	Improve agent performance to spend less time handling the call (AHT) and after call work (ACW), improve accuracy and customer care, and more effective training and compliance management using comprehensive Quality Management tracking
Improved Customer Experience	Address the root cause(s) of low indicators for NPS, FCR and high handle time using Quality Evaluation criteria
Increased Revenue	Identify lower performers and then coach them on critical agent skills to improve sales and collections using Quality Evaluation criteria

### Summary

Organizations need to evaluate and improve the quality of the interactions that their employees have with their customers and prospects. The QM module is a tool that helps organizations improve the quality and efficiency of agent performance and contribute to customer satisfaction.

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## Use Case Definition

### Business Flow

Flowchart of business usage:

### Business and Distribution Logic

#### Business Logic

#### **Quality Manager**

Create and manage forms (questionnaires) that enable 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. 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.

#### **Interaction Recorder**

To help ensure that an agent's participation in an interaction coincides with a specific business agenda, evaluators receive a list of evaluation sessions that they must fill out using scorecards according to a configurable schedule. A completed scorecard 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.

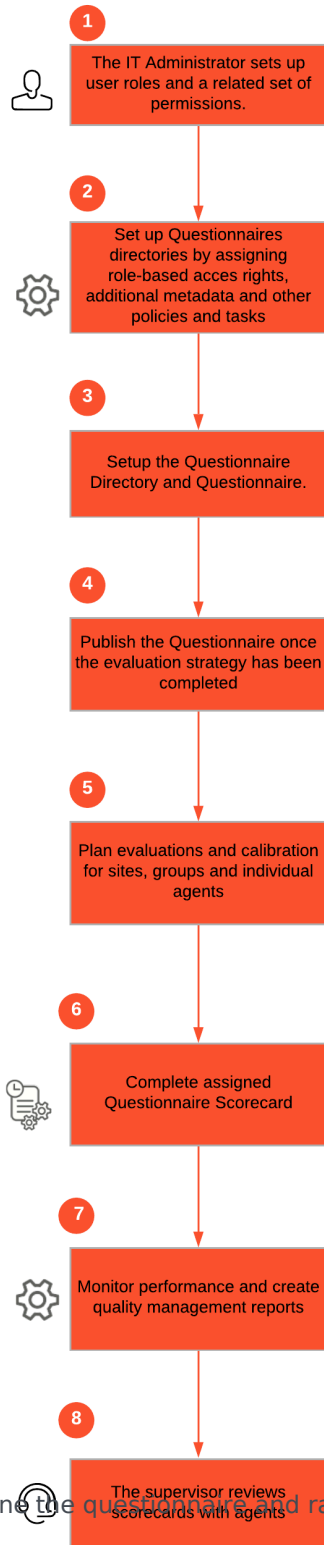
#### **Interaction Reporter**

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, IC Business Manager provides 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.

#### **Parameters and Business Rules common flow**

The following needs to be set up to support the quality management process:

1. IT Admin to set up users and:
  - Role based access rights for questionnaire directory access
  - Additional metadata configuration (relevant to QM)
  - Initiation and retention policies criteria and actions to auto-assign questionnaire scorecards to recordings and scoring users
2. Set up and publish questionnaires for quality management and historical reporting:



- Define the questionnaire and ranking settings.

**Business Flow Description** The Business flow shows steps to create QM questionnaires, evaluate recordings, and review results with agents.

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. Setup up questionnaire directories by assigning
  - Role-based access rights for questionnaire directory access.
  - Additional metadata configuration (relevant to QM).
  - Initiation and retention policies criteria and actions to auto-assign questionnaire scorecards to recordings and scoring users.
3. Setup the questionnaire directory and questionnaire: From within IC Business Manager, use the Quality Manager views to create and save a Questionnaire with the following:
  - Questionnaire ranking
  - Questionnaire group
  - Questionnaire questions
  - Scoring requirements
4. Publish the questionnaire once the evaluation strategy has been completed to allow the questionnaire scorecards to be assigned to recordings and used for reporting purposes.
5. Evaluation/calibration planning: The evaluation planner plans review sessions for CC sites, groups or individual agents. The planner decides how to configure Interaction Recorder initiation and retention policies to auto-assign questionnaire scorecards based on incoming recorded

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- Define the question groups that will be required within a questionnaire.
  - Define and configure the questions contained within each question group; specify the proper question type (multiple choice, yes / no, etc) .
  - Define the importance of each question along with the actual answers.
  - Define which questions will allow comments to be specified and whether or not an answer can be marked Not Applicable (N/A).
  - Define weighting of each question.
3. Save and preview changes for each questionnaire.
  4. Publish questionnaire once each questionnaire has been finalized. Questionnaires must be published in order to be assigned for quality evaluations and included within historical reporting.
  5. Evaluation/Calibration planning
    - Within IC Business Manager, identify recordings that require either evaluation or calibration.
      - Assign calibration scorecards for role or user based calibration.
      - Manually assign questionnaire scorecards to recordings for evaluations.
    - Define process for scoring users to review recordings and complete questionnaire scorecards.
      - Recording searches returns recordings for playback and ability to manage scorecards.
      - Scorecard searches and the Recordings To Score View provides results based on scorecards in progress, auto-assigned, completing, etc.
  6. Manage questionnaire scorecards for evaluation
    - Select scorecard or recordings to be evaluated; playback the recordings and complete the assigned questionnaire scorecard form(s).
    - Save scoring progress as needed. Finish the scorecard and indicate if the agent evaluated must acknowledge (signoff) on the questionnaire scorecard.
  7. Select and run reports
    - Define filters and run Interaction Quality Management reports to review scorecard and quality results.
    - Define filters and run Interaction Reporting Calibration reports to review calibration summary results.
- interactions. Questionnaire scorecards may also be manually assigned to recorded interactions from within IC Business Manager, based on other interaction criteria or recording attributes. Details tasks:
- Attach questionnaire scorecard forms to recorded interaction
  - Assign evaluators (scoring users)
6. Complete assigned questionnaire scorecard: The evaluation planner/supervisor conducts reviews of the appropriate teams and gives feedback and insight into how many reviews need to take place, what has been done, and what is in progress or still pending. Detailed actions:
    - Select a recording.
    - Play back the selected recording.
    - Score a recording with the auto-assigned questionnaire scorecard.
    - Score a recording with a manually assigned questionnaire scorecard.
    - Finish the scorecard.
  7. Create Quality Management Reports: The evaluation reviewer monitors performance on progress results displays and uses report templates that are relevant for the actors' role to display. This can be part of a dashboard, background report, or email subscription. Detailed actions:
    - Run an instance of a selected Quality Management report.
    - Run a calibration report for completed scorecards that were marked for calibration.
  8. Supervisor reviews scorecards with agents: The supervisor pushes a report to the agent to provide feedback. The agent is informed about their performance.
    - Agents review their recently completed scorecards.
    - Agents acknowledge and provide comments (sign-off) for completed scorecards that require action.
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- Save to filters to the reporting library for reuse.

## Distribution Logic

N/A

## User Interface & Reporting

### Agent UI

For screen recording, a desktop client needs to be deployed per workstation.

### Reporting

#### Real-time Reporting

N/A

#### Historical Reporting

In any quality management process, the customer needs to have a proper display of progress and performance results to identify the improvement needs. The customer can define the minimum displays they need to follow a QA process. QM report templates available:

- Calibration Question Group Details
- Deleted Recording Audit by Date
- Deleted Recording Audit by User
- Recorder Questionnaire Detail
- Recorder Scoring Summary
- Recorder User Scoring Summary
- Quality Scoring Details
- Calibration Details
- Calibration Recording Summary

## Customer-facing Considerations

### Interdependencies

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



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All of the following required:	At least one of the following required:	Optional	Exceptions
None	<b>Workforce Engagement</b> <ul style="list-style-type: none"> <li>Genesys Voice Recording (EE07)</li> <li>Genesys Voice and Screen Recording (EE08)</li> </ul>	None	None

## General Assumptions

- Recording is setup in full detail and attribute relevancy is sorted out
- Understanding of the business QA process:
- Scoring quotas/targets and planning criteria are known
- Scoring thresholds are known (for example, 60% minimum 90% excellent)
- Scoring categories are defined (for example, greeting, knowledge, behavior)
- Scoring question types are defined (for example, multi selection, choice pass/fail)
- Scoring answers follows a business standard, such as 2,3,4, answers plus free text
- Result preferred output is defined (for example, how to display what has been measured)
- Regulatory specials:
- With every project it is highly recommended to discuss the local restriction related to compliance, data protection and any special council need to make sure the access to interaction and allowance to review is understood in full detail.
- IWP does not support geo-redundancy, so it is not offered as a geo-redundant solution in PureConnect Cloud.

## Document Version

- Version **v 1.0.1** last updated **February 7, 2025**