CALL RECORDING

Evaluate

Admin Quick Reference

MOMENTUM

Powered By: MiaRec

UC24Q3

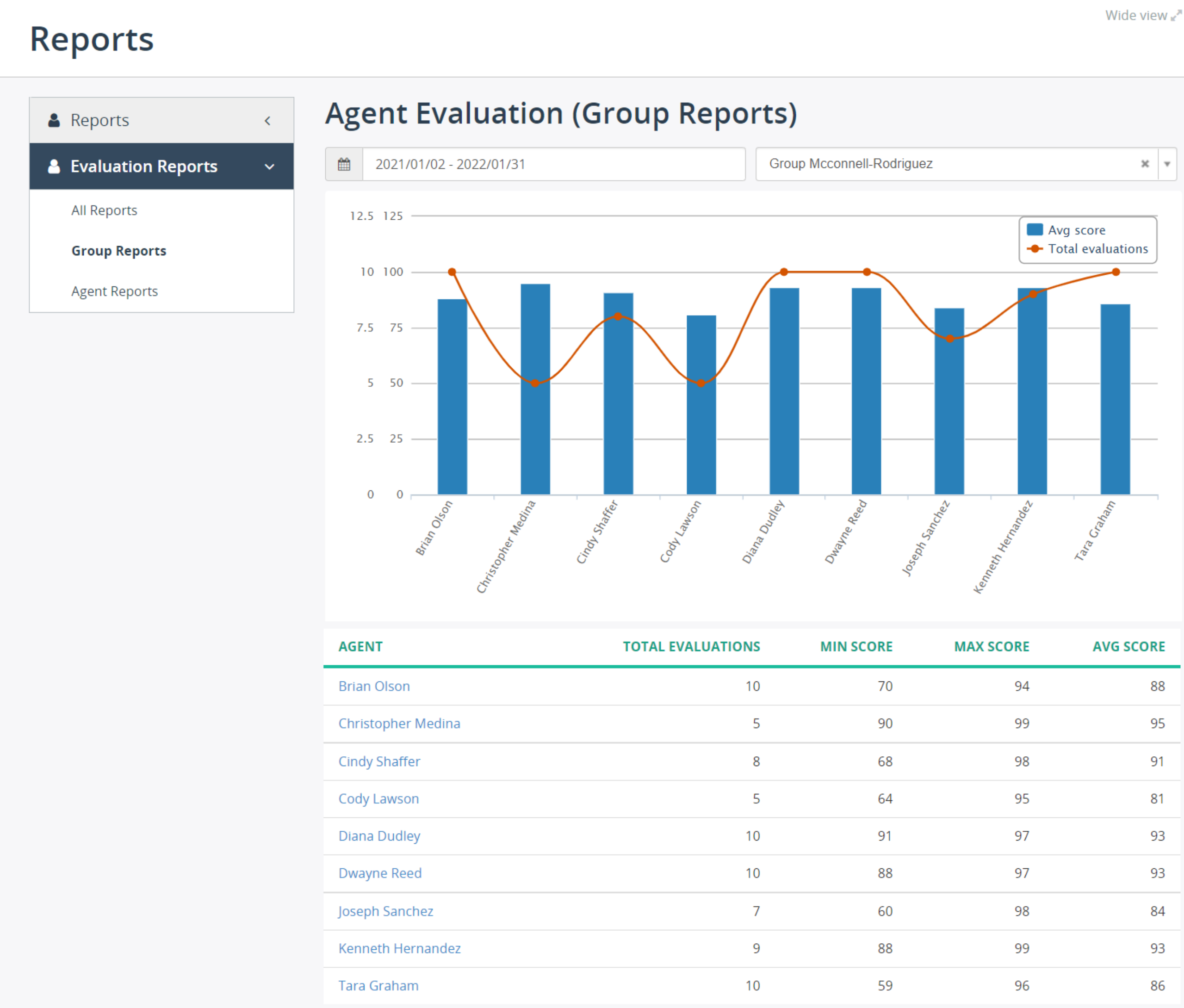
About Call Recording with Evaluate

The Evaluate add-on license ($) offers organizations many tools for determining how their calls are going and for Quality Assurance monitoring. Both Manual and Automated evaluation scoring are supported if all required add-on licenses have been purchased. If the optional add-on ($) Speech Analytics license was also purchased, Agent Evaluations are enhanced by visibility into the call transcriptions and Admin access to use tools to build more advanced AI-assisted automated QA.

An Evaluate license is applied to the person/line being recorded that must undergo evaluation. If the line/person is not going to be evaluated, the Evaluate add-on license is not needed and QA will not be available for that line/person's calls.

Once purchased and enabled for the line/person who will undergo evaluation of their calls, Admins can create Evaluations and Supervisors (or Admins) who have been authorized to manage that licensed line/person’s call recordings can then perform evaluations of their calls using forms the organization's Admins have complete control to design and manage for this purpose.

The Evaluation reports provide access to useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for specific agent, evaluations for groups, etc.



AGENT	TOTAL EVALUATIONS	MIN SCORE	MAX SCORE	AVG SCORE
Brian Olson	10	70	94	88
Christopher Medina	5	90	99	95
Cindy Shaffer	8	68	98	91
Cody Lawson	5	64	95	81
Diana Dudley	10	91	97	93
Dwayne Reed	10	88	97	93
Joseph Sanchez	7	60	98	84
Kenneth Hernandez	9	88	99	93
Tara Graham	10	59	96	86

Authorized Admins can easily create an Evaluation form within the ***Evaluation Form Designer*** found in the **QA** section of Call Recording.

1. Overview

Agent Evaluation in Call Recording (powered by MiaRec) allows contact center managers to monitor and measure the performance of individual agents calls within a contact center for useful metrics.

Call Recording supports both manual and automated Quality Assurance (QA).

1.1 Manual QA

With manual QA, supervisors listen to a random sample of calls and evaluate them according to a predefined scorecard.

The goal here would be to look for coachable moments and find areas where agents can improve.

A typical scorecard consists of several sections, like "Greeting", "Verification", "Problem resolution", etc. Each section includes questions or metrics that are evaluated by the supervisor.

A sample scorecard is shown in the table below.

Section	Questions
Greeting	Did the agent say "Thank you for calling"?
	Did the agent mention his/her name?
	Did the agent mention the company name?
	If the call was transferred, did the agent adapt the greeting accordingly?
Verification	Did the agent ask for the caller's name?
	Did the agent ask for the caller's account number?
Understanding the problem/ issues	Did the agent identify the customer's needs by active listening?
	Did the agent fully understand the request?
	Did the agent repeat back to the customer what their query or problem was?
	Did the agent show empathy to the customer's problem and reassure the customer?
	How well did the agent determine the problem/complaint and select the appropriate response?
Hold/mute/transfer	Did the agent inform the caller of the reason for the hold/transfer?
	Did the agent thank the caller for holding on return?
	Did the agent provide the name of the person or the department in case of transfer?
Problem resolution	Was the problem resolved in the first call?
	Did the agent describe clearly the resolution?
Closing	Did the agent offer to transfer to a customer satisfaction survey?
	Did the agent thank the customer for calling?

Manual QA is essential in monitoring and measuring the quality of customer service in contact centers. But it has its limitations.

A manual QA process is time-consuming. Supervisors are able to listen to only a fraction of calls when evaluating an agent – leasing to a less than accurate picture of the agent's performance.

Even worse, it can skew the evaluation of an employee if a supervisor only listens to a few bad calls.

1.2 Automated QA

Automated QA process uses speech analytics and artificial intelligence (AI) to automatically score every agent interaction, providing a fuller and unbiased evaluation of agent performance.

By capturing, transcribing, and analyzing 100% of interactions, the MiaRec platform vastly increases insight into agent performance and offers a wealth of actionable information for call center improvement - while dramatically reducing the effort required of call center supervisors.

Despite the obvious benefits of automated QA, it should not be viewed as a complete replacement of the manual QA process. The best approach is to integrate both manual and automated scoring into QA process.

Evaluation forms are completely customizable and configurable. An administrator or manager can create different forms for each department, like Sales, Customer Service or Technical Support. Use Evaluation Form Designer to develop the questions and their answers.

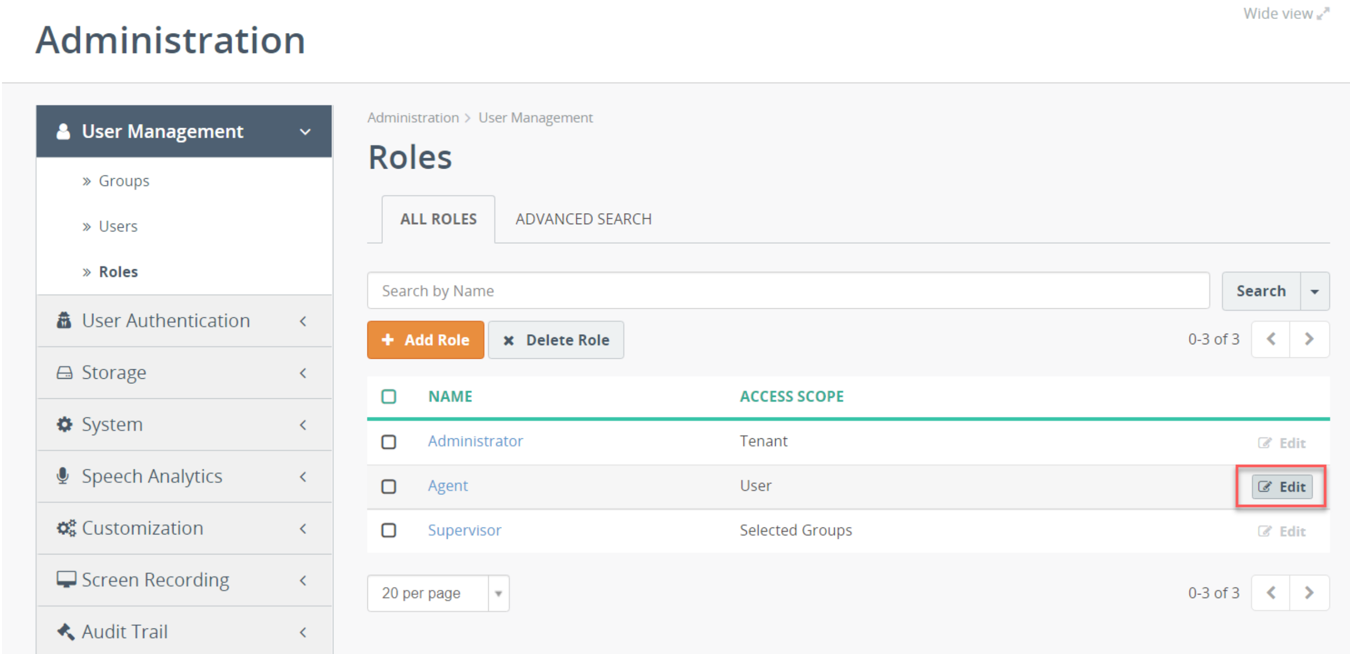
For details, see Evaluation Form Designer.

2. Prerequisites

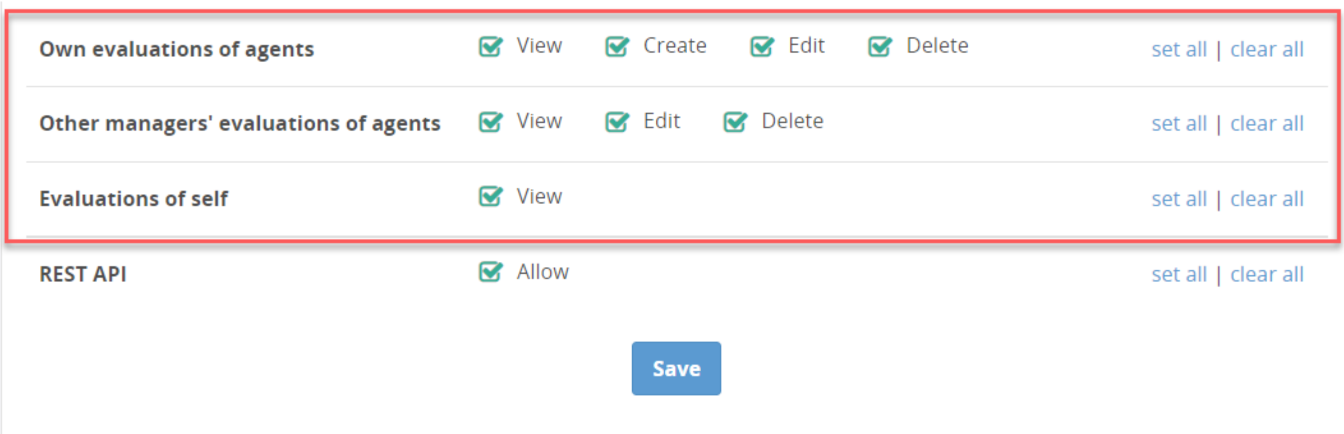
The user should have appropriate permissions to fully utilize the evaluation reporting functionaltiy. Permissions setting specifies what operations are permitted on the accessible evaluation reports. These operations include view, create, edit, delete.

To configure the permissions:

1. On the **Administration** page, navigate to the role assigned to the user.
2. Click the **Edit** button next to the access scope.



3. On the **Edit Role** page, scroll down to the **Other Permissions** section and check the following permissions:



Own evaluations of agents

- **View** - if selected, the user will be able to view the evaluations of agents under his/her supervision.
- **Create** - if selected, the user will be able to create new evaluations of agents under his/her supervision .
- **Edit** - if selected, the user will be able to modify the evaluations of agents under his/her supervision.
- **Delete** - if selected, the user will be able to delele the evaluations of agents under his/her supervision.

Other managers' evaluations of agents

- **View** - if selected, the user will be able to view the evaluations of agents under other managers' supervision.
- **Edit** - if selected, the user will be able to modify the evaluations of agents under other managers' supervision.
- **Delete** - if selected, the user will be able to delele the evaluations of agents under other managers' supervision.

Evaluations of self

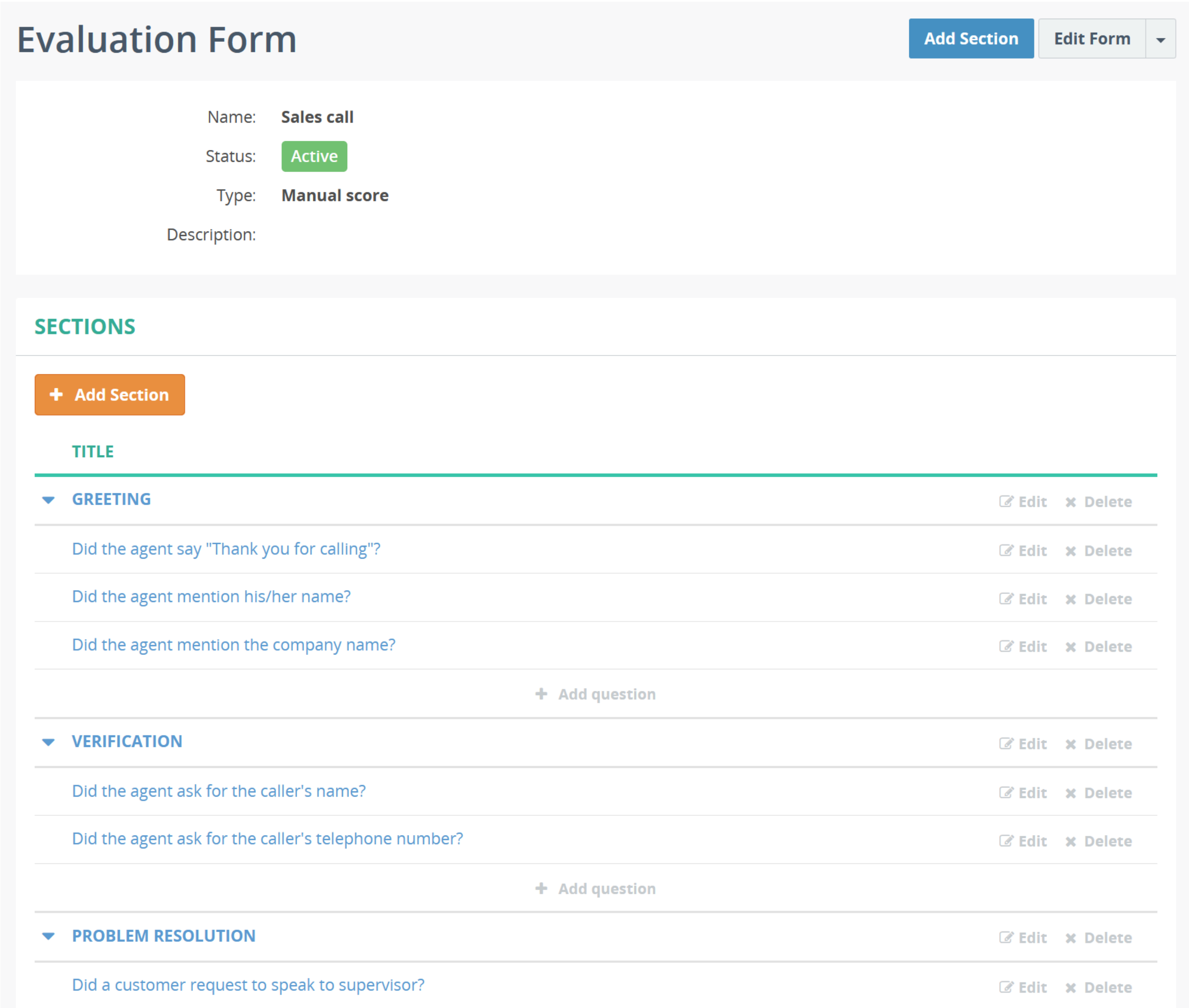
- **View** - if selected, the user will be able to view only his/her evaluation reports and not of any other users.
- Click **Save**.

3. Form Designer

3.1 Create Evaluation Forms

Evaluation reports use evaluation forms to assess and monitor agents' performance. You can easily create an evaluation form with the Form Designer.

The following screenshot shows a sample evaluation form:



There are 3 ways of creating a new form:

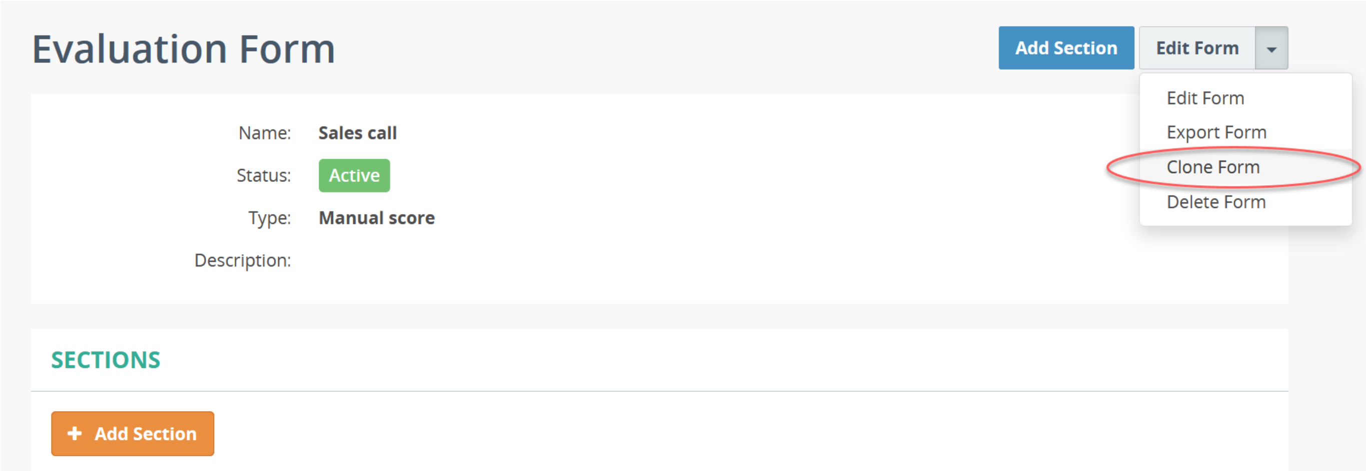
1. Clone the existing form
2. Import from a file
3. Create from scratch

3.1.1 Clone the existing form

You can create an exact copy of an existing form and use it as the basis for a new, different evaluation form.

To clone an evaluation form:

1. Navigate to **QA** > **Form Designer**.
2. Open the evaluation form that you want to copy.
3. Click **Clone Form** in the dropdown menu of the **Edit Form** button.

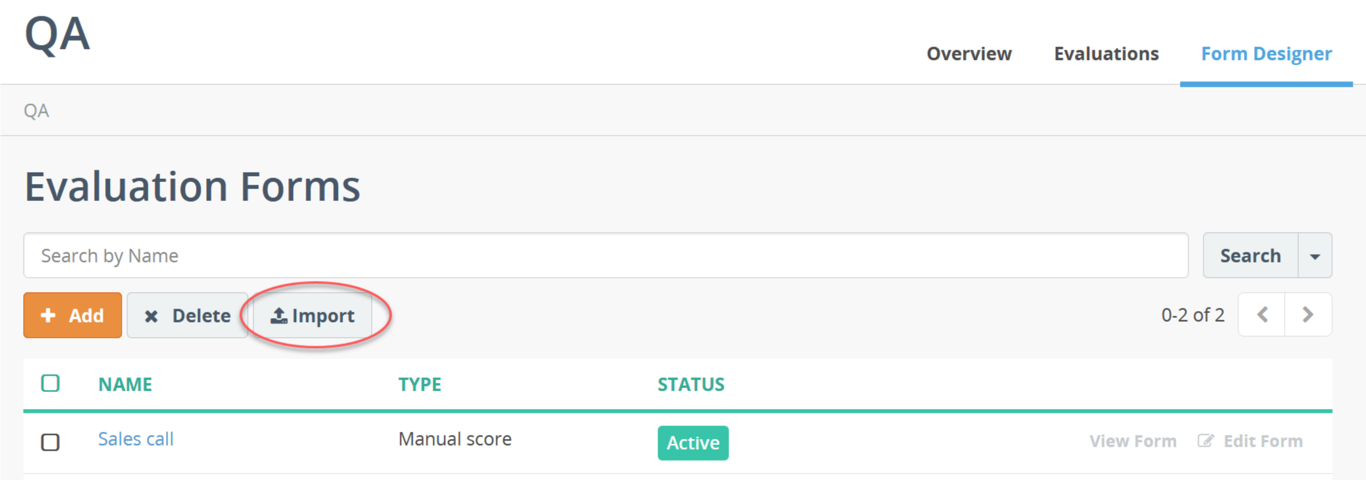


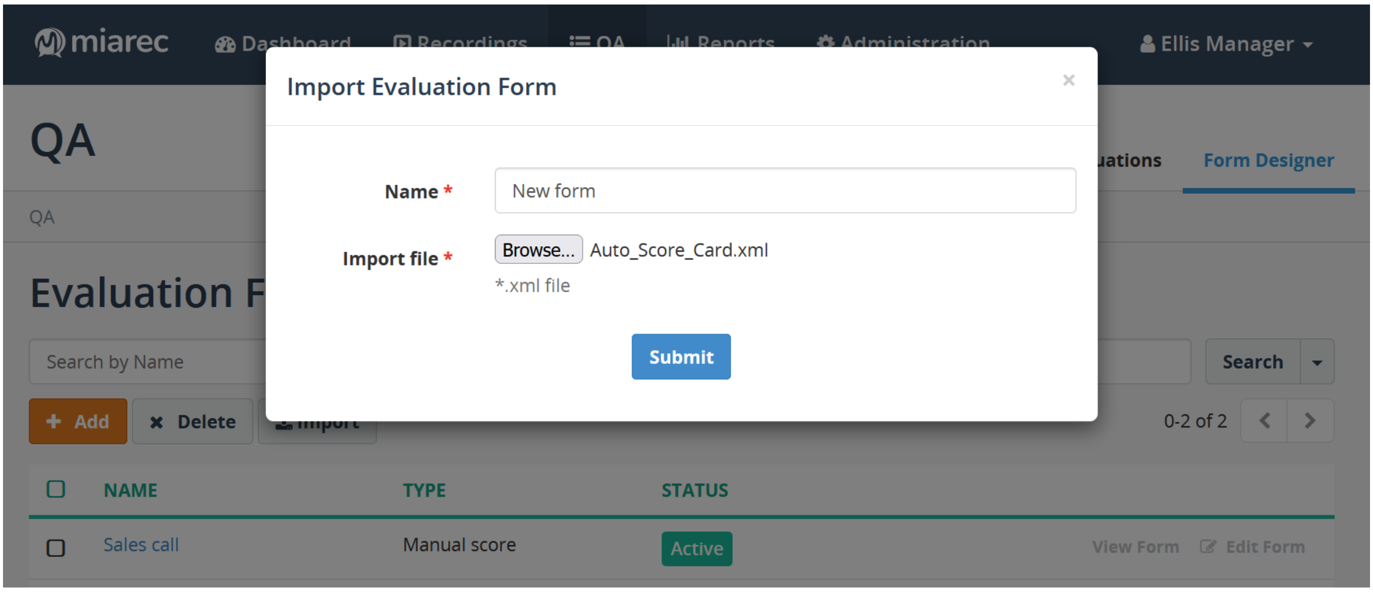
3.1.2 Import from a file

You can import the form from a file that was exported previously from the MiaRec application.

To import an evaluation form:

1. Navigate to **QA** > **Form Designer**.
2. Click **Import** button.
3. Provide the **Name** and file to import.

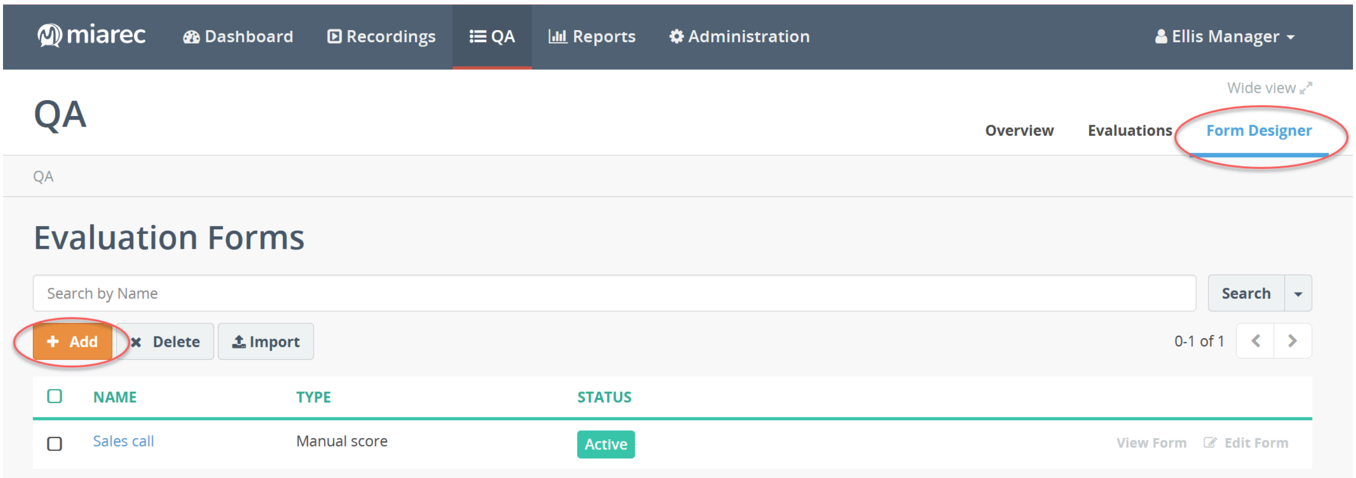



miarec
Dashboard
Recordings
QA
Reports
Administration
Ellis Manager
Import Evaluation Form
Name *
New form
Import file *
Browse...
Auto_Score_Card.xml
*.xml file
Submit
QA
Form Designer
Evaluation F
Search by Name
Search
Add
Delete
0-2 of 2
NAME
TYPE
STATUS
Sales call
Manual score
Active
View Form
Edit Form

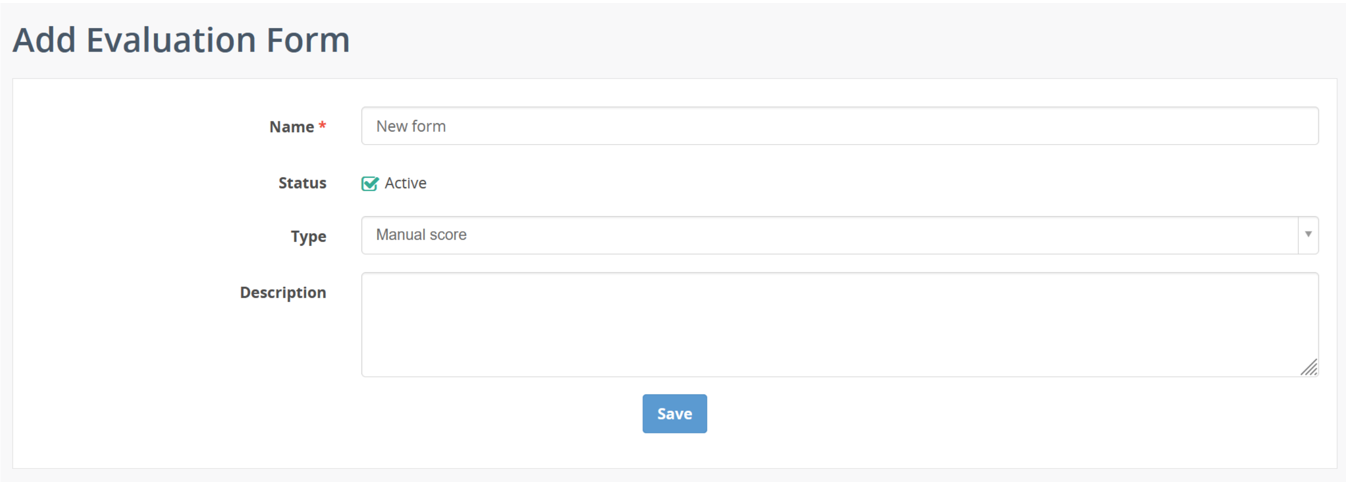
3.1.3 Create a form from scratch

To create a new form from scratch:

1. Navigate to **QA** > **Form Designer** and click **Add**.



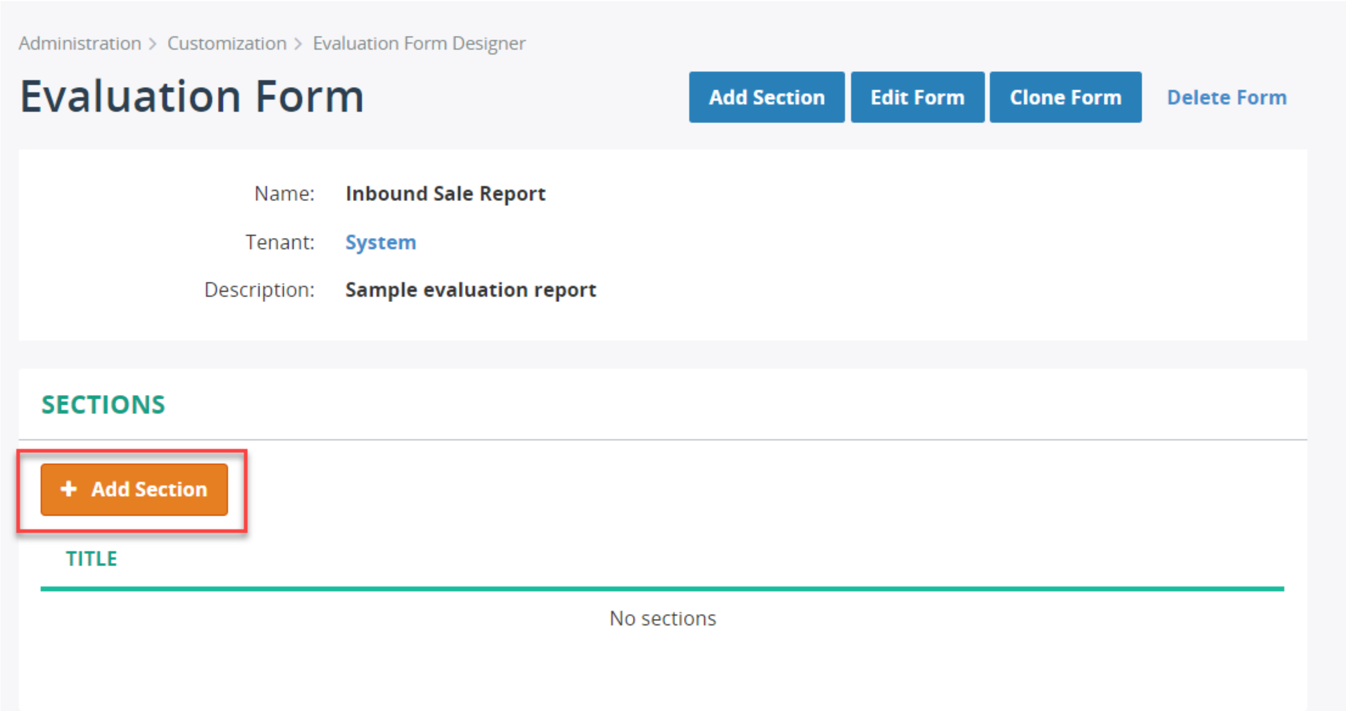
2. Enter the form name in the **Name** field, and provide an optional **Description**.
3. Set the **Status** to **Active** to make the form available to users for evaluation. Clear this flag if the form is not ready yet.
4. Choose either **Manual score** or **Auto score** in the **Type** field. If the type is set to **Auto score**, then such a form will be used for automatic scoring of interactions.



5. Click **Save**.

3.1.4 Add sections to the form

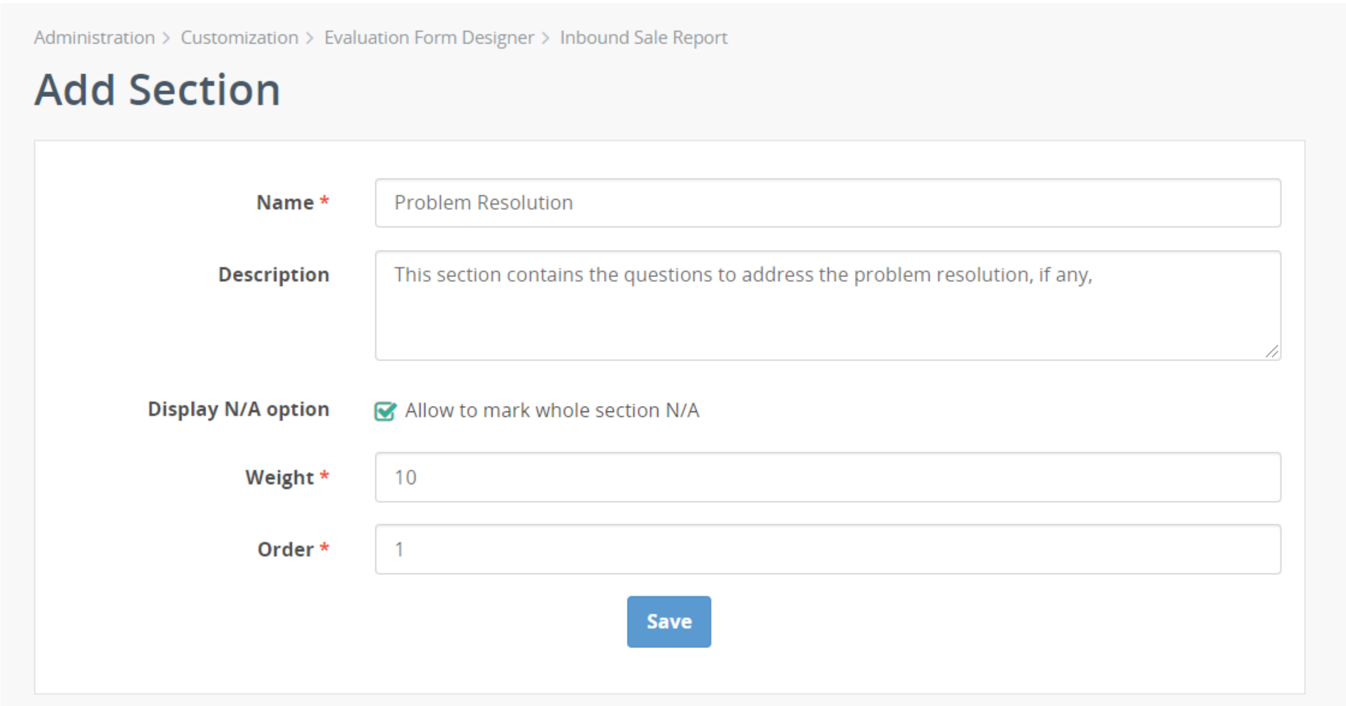
1. Open the evaluation form that you would like to edit.
2. Click **Add section**.



3. Enter the section name in the **Name** field, and provide an optional description in the **Description** field.
4. To allow a supervisor mark this whole section as not applicable, select the **Display N/A option** check box.

   With such an option, a supervisor will be able to exclude a whole section from a score calculation, for example, when such a section contains questions that are not applicable for the evaluated interaction.
5. In the **Weight** field, enter how much this section must influence the report score.

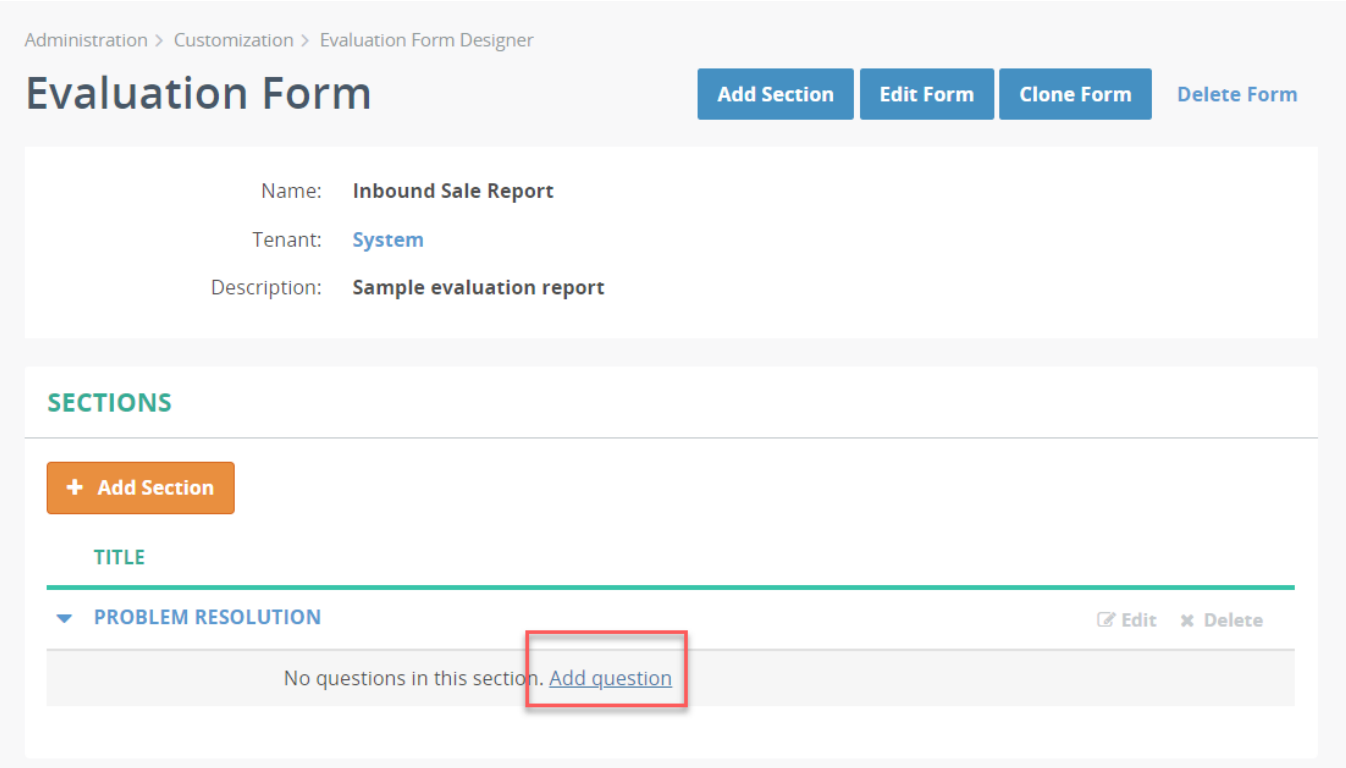
   The integer value can accept positive numbers within the range `1` to `1000`. For details on calculating the weighted score, see Score Calculation Logic.
6. In the **Order** field, specify the order in which this section appears in the report. The integer value can accept positive and negative numbers within the range `-1000` to `+1000`. Sections are ordered by lowest value first.



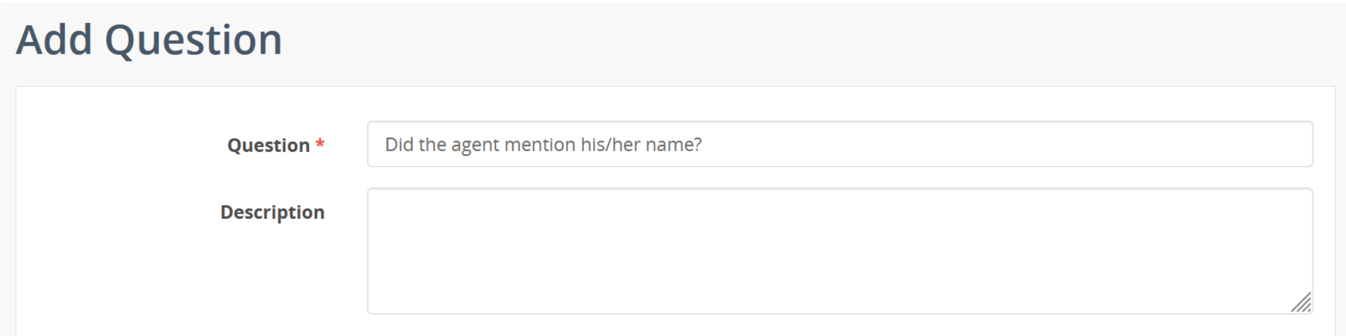
7. Click **Save**.

3.1.5 Add questions to the form

1. Click **Add question** under the section, for which you would like to add new question.



2. In the **Question** field, enter your question text.
3. Provide an optional description in the **Description** field, which would help users of this form to understand a meaning of this question.

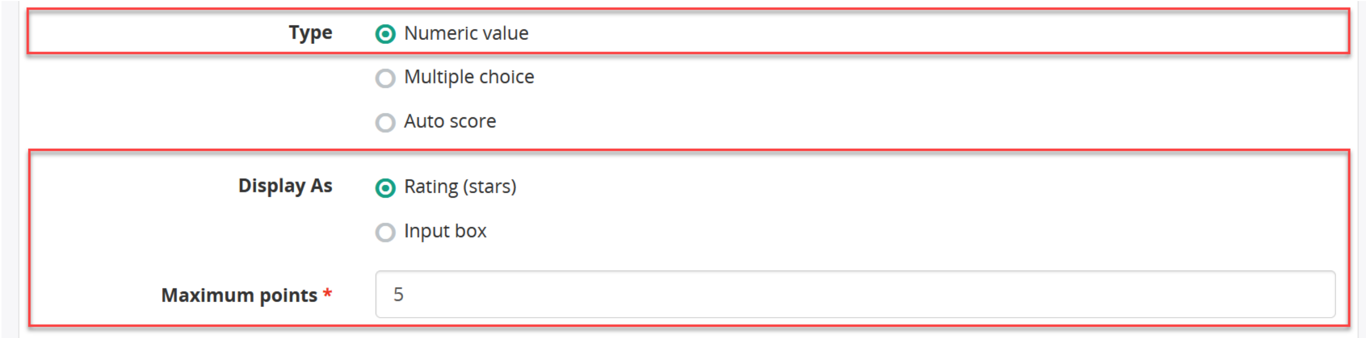


4. Choose a question type. Three options are available:
    - Numeric value
    - Multiple choice
    - Auto score

    Depending on the selected type, you need to provide different options.

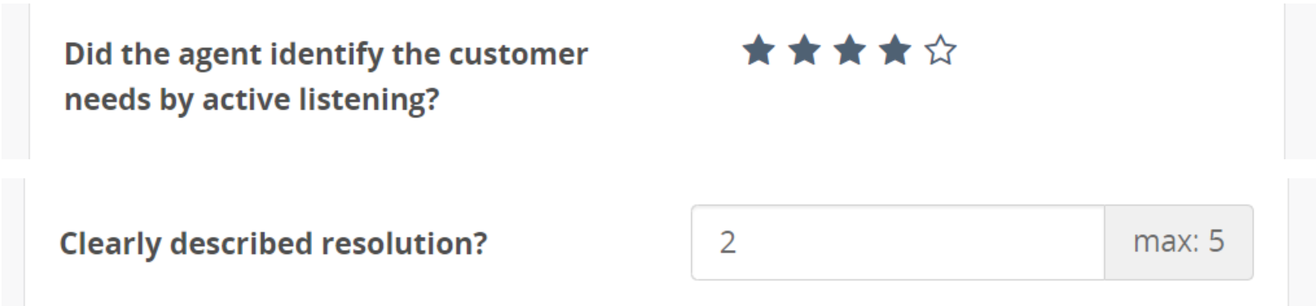
Numeric value question type

For the **Numeric value** type, the following attributes are available:



- **Display As** option specifies how to display this question in the report, either as **Rating (stars)** or **Input box**.

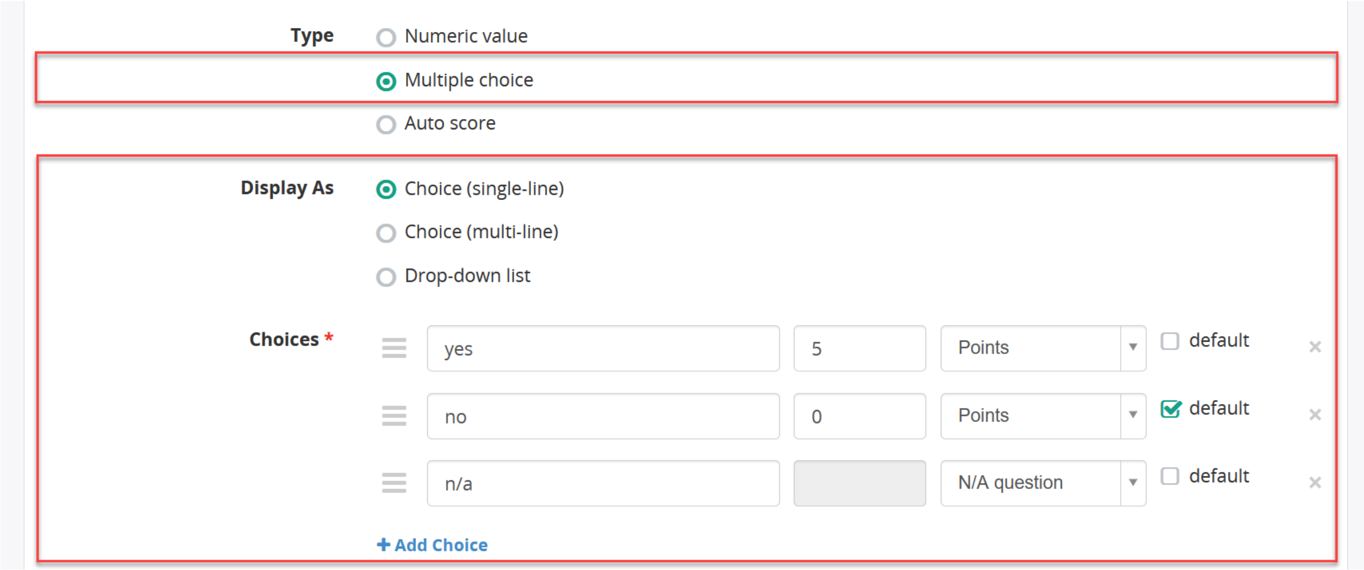
  The following screenshot demonstrates all of these options in a report:



- **Maximum points** option specifies a maximum value that can be entered by evaluator for this question

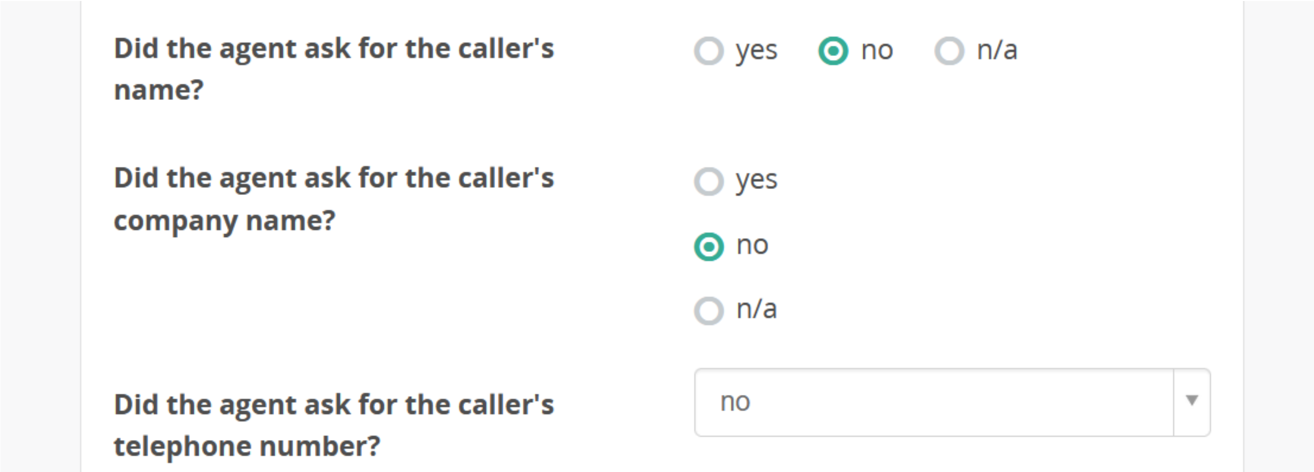
Multiple choice question type

For the **Multiple choice** type, the following attributes are available:


Type
Numeric value
Multiple choice
Auto score
Display As
Choice (single-line)
Choice (multi-line)
Drop-down list
Choices *
yes
5
Points
default
no
0
Points
default
n/a
N/A question
default
+ Add Choice

- **Display As** option specifies how to display this question in the report, either as **Choice (single-line)**, **Choice (multi-line)** or **Drop-down list**.

  The following screenshot demonstrates all of these options in a report:



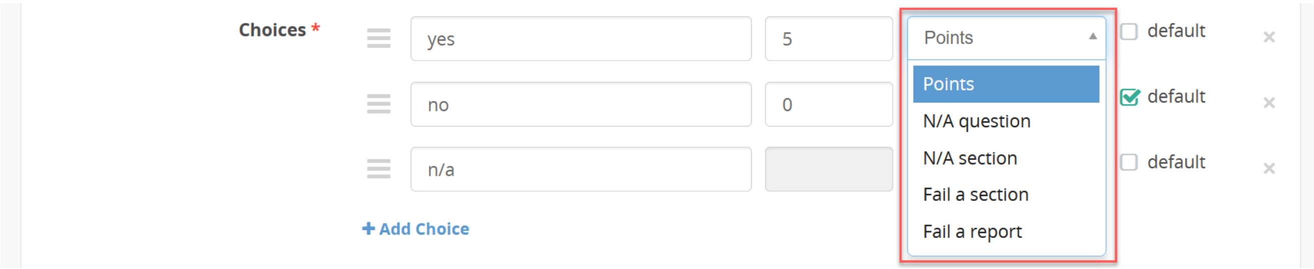
- **Choices** option specifies a list of all possible answers for the question.

  Each choice has a title, and an outcome that will be applied to a report when such an answer is chosen.

  The outcome can be one of the following values:

  - **Points**. When such a choice is selected in a report, the specified number of points will be granted this question
  - **N/A question**. When such a choice is selected in a report, the question will be excluded from the score calculation
  - **N/A section**. When such a choice is selected in a report, a whole section will be excluded from the score calculation
  - **Fail a section**. When such a choice is selected in a report, a whole section will be marked as failed, i.e. the section gets 0 score
  - **Fail a report**. when such a choice is selected in a report, a whole report will be marked as failed, i.e. the report gets 0 score

  The following screenshot demonstrates these outcome variants:

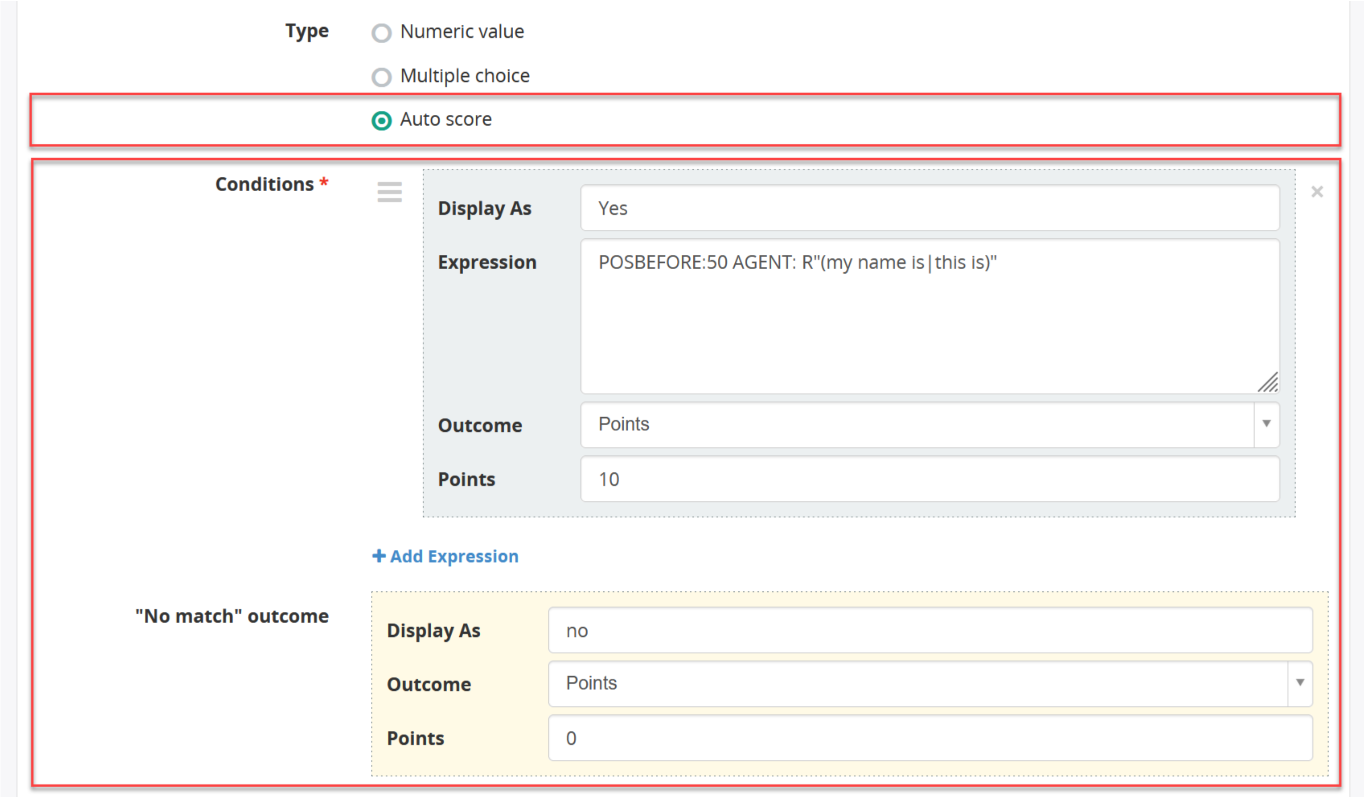


  Optionally, you can mark one of choices as default. In such a case, when an evaluator creates a report, the question will be set to a default answer.

  If none of choices are marked as default, then an evaluator must explicitely answer this question, otherwise the report cannot be saved as **Completed**.

Auto Score question type

For the **Auto Score** type, the following attributes are available:



- **Conditions** option specifies one or multiple conditions that will be checked by the auto scoring engine.

  The **Expression** field contains a query expression that will be applied to transcript. For example, expression `POSBEFORE:50 AGENT: R"(my name|this is)"` means:

  - search in the first 50 words of the transcript (`POSBERFORE:50`)
  - a speaker must be agent (`AGENT:` operator)
  - search for key phrases "my name" or "this is" (regex expression `R"(my name|this is)"`)

  For a detailed syntax, check out the MQL Reference Guide

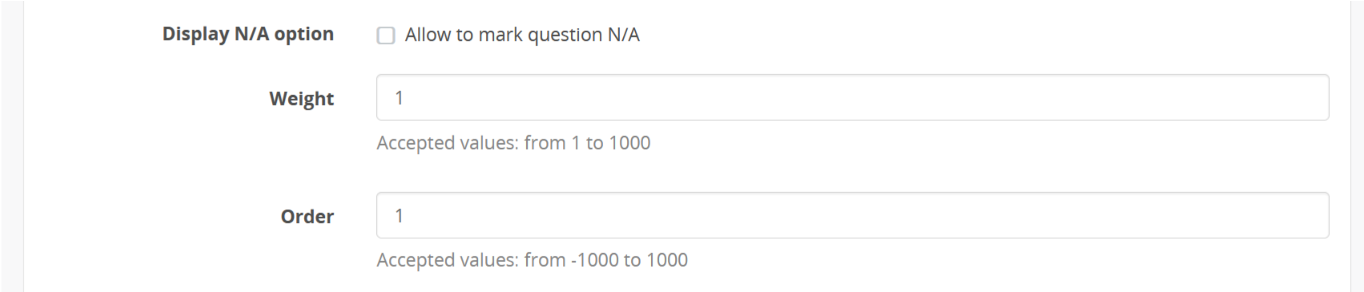
  The **Outcome** option may have one of the following values:

  - **Points**. When such a condition matches in an interaction, the specified number of points will be granted this question
  - **N/A question**. When such a condition matches in an interaction, the question will be excluded from the score calculation
  - **N/A section**. When such a condition matches in an interaction, a whole section will be excluded from the score calculation
  - **Fail a section**. When such a condition matches in an interaction, a whole section will be marked as failed, i.e. the section gets 0 score
  - **Fail a report**. when such a condition matches in an interaction, a whole report will be marked as failed, i.e. the report gets 0 score

  If multiple conditions match, then the first one in an order will be chosen.

- **No match** outcome specifies a default outcome if none of the conditions matches

Other question attributes



- The **Display N/A option**, if selected, to allow evaluators to mark this question as not applicable. Such an option is useful for **Numeric value** type. For **Multiple choice** and **Auto-score** question types, there is an alternative option to use the **N/A question** outcome.
- The **Weight** field specifies how this question influences the overall section and report scores. The integer value can accept positive numbers within the range `1` to `1000`.

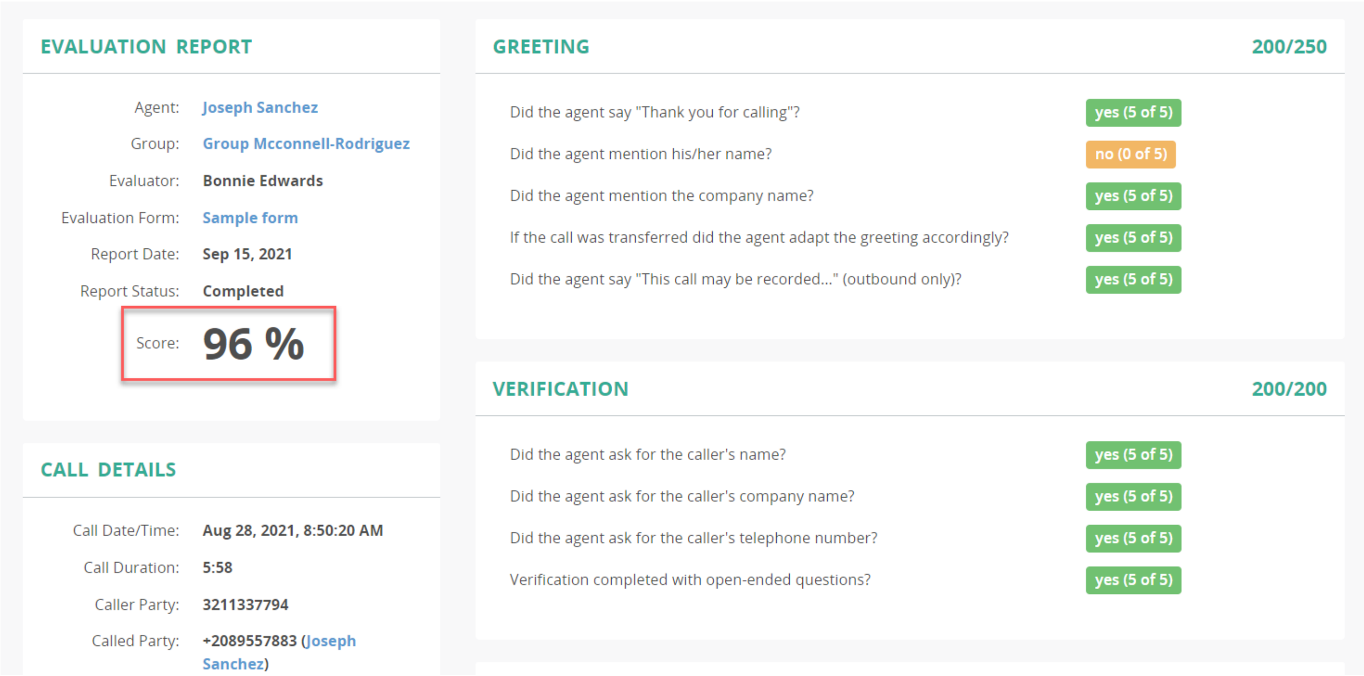
  For details on calculating the weighted score, see Score Calculation Logic.
- The **Order** field specifies the order in which such a question appears in a report. Questions are ordered by lowest value first.

3.1.6 What happens to the reports when the parent form is deleted?

Deleting an evaluation form will delete all the reports that are based on this form as well.

3.2 Score Calculation Logic

The evaluation is scored based on a point system.



3.2.1 How scores are calculated?

First, for each question, the application tracks two values:

- Points that are earned based on a response to this question
- Maximum points that the questions may potentially earn

A ratio between these two values determines a total question score.

For example, if a simple **Yes/No** question is configured with 5 points for a **yes** response and 0 points for a **no** response, then the maximum question score is 5.

When such a question is answered **yes**, then the question's score is 5 out of 5 (or 100%). If it is answered **no**, then the question's score is 0 out of 5 (or 0%).

These calculations assume that a question has a weight of 1 (i.e. it is not weighted). For cases when a custom weight is applied to a question, check the section below for an explanation of how the section score is affected.

Second, for each section, the application calculates a ratio between the following values:

- An aggregated sum of earned points for each question in the section
- A maximum possible score for the section, which is the sum of the maximum possible scores of all the questions in the section.

If **N/A** (not applicable) option is selected as a response to a question, then such a question is treated as if it doesn't exist and its maximum possible score is not used when calculating the section maximum score.

> **Note**
>
> **N/A** option is not the same as **0 (zero)** points. When a question is answered with 0 points, such a score is treated as 0 out of X (where X is the maximum possible question score).
>
> **Example:**
>
> A section has 10 questions, where each question is a simple **yes/no** question with the maximum possible score 5.
>
> If one of the questions is answered **no** and the remaining 9 questions are answered **yes**, then the total section score would be 45 out of 50 (or 90%).
>
> But, if one of the questions is answered **N/A** instead of **no**, then such question's maximum score doesn't affect a maximum section score, i.e. the total section score would be 45 out of 45 (or 100%).

Finally, a report score is calculated as a ratio between the following values:

- An aggregated sum of earned points for each section in the report
- A maximum possible score for the report, which is the sum of the maximum possible scores of all the sections in the report.

If the section is marked as **N/A** (Not applicable), then such a section is treated as it doesn't exist and it doesn't affect the maximum possible report score. This works similarly to the question's **N/A** behavior.

3.2.2 How weight is applied to questions and sections?

Each section and question could have its own weight that determines how much it influences the total score for the evaluation report. By default, the sections and questions are not weighted (their weight value is 1).

Example:

A section has two questions:

1. The first question with options **yes** (5 points), **no** (0 points) and **N/A** type, and a weight of 10.
2. The second question with options **yes** (5 points), **no** (0 points) and **N/A** type, but a weight of 1.

A question score is multiplied by its weight, and a resulting value is used when calculating a section score.

In our example, the maximum possible section score is 55 (where `55 = 5 x 10 + 5`)

If both questions are answered **yes**, then the section score would be 55 out of 55 (or 100%).

If the first question is answered **no**, but the second question is answered **yes**, then the section score would be 5 out of 55 (or 9%).

In a reverse situation, when the first question is answered **yes**, but the second one is answered **no**, the section's score would be 50 out of 55 (or 91%).

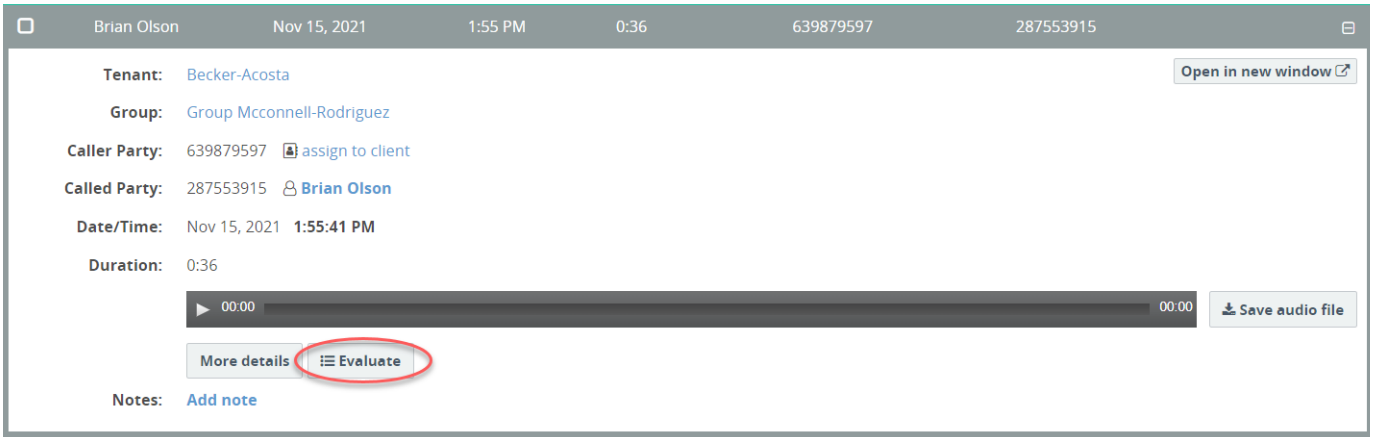
In case the first question is answered **N/A**, and the second one is answered **yes**, then a score of the section would be 5 out of 5 (i.e. the application excludes the first question completely from the calculation).

Similar logic works for section weights.

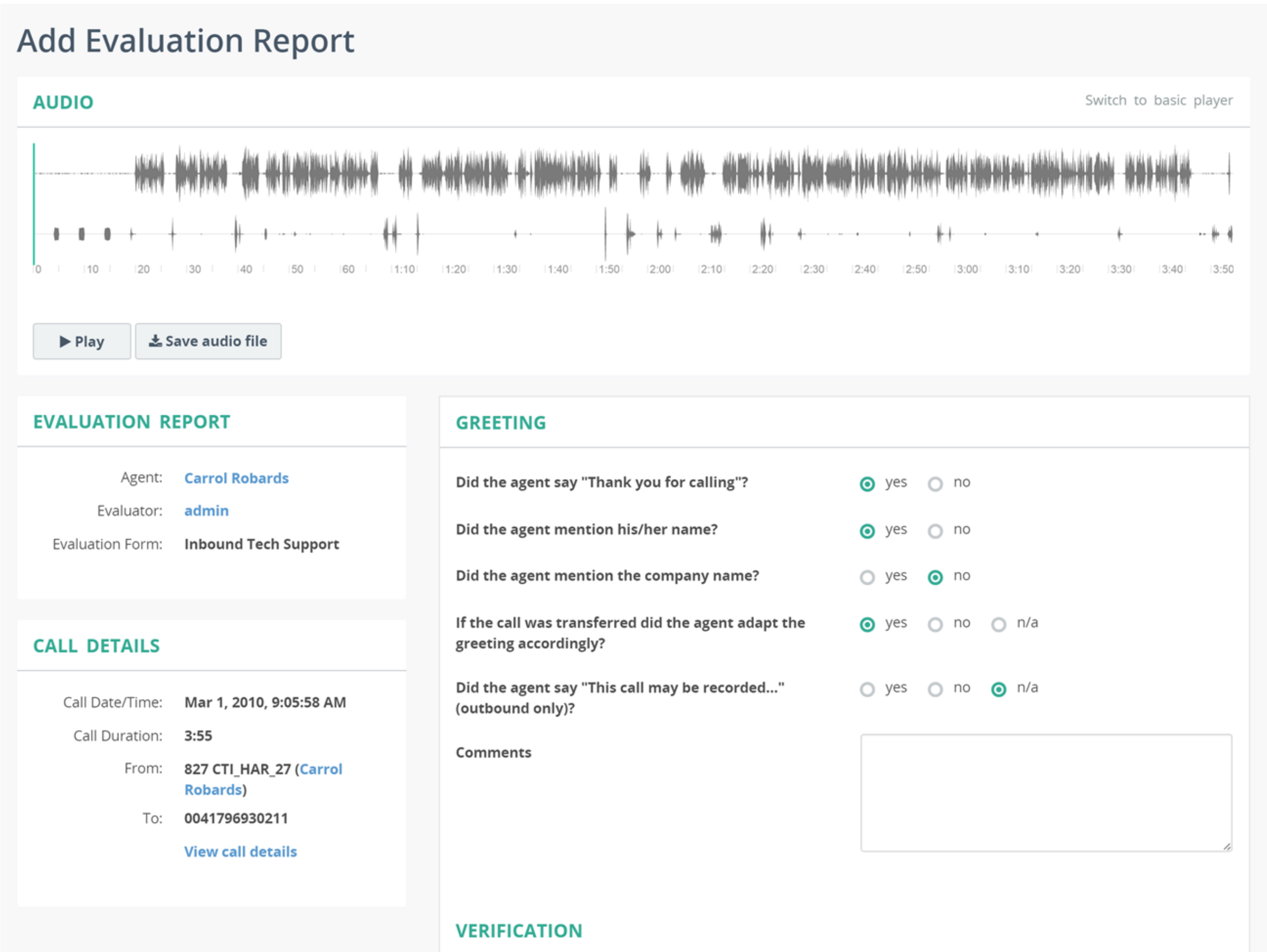
4. Manual scoring

4.1 Manual scoring

To manually evaluate interaction, select a call recording in MiaRec portal and click the **Evaluate** button.



Then, you listen to the call recording and answer questions in this evaluation form. Once all questions have been answered, this call will be scored from 0 to 100 points.



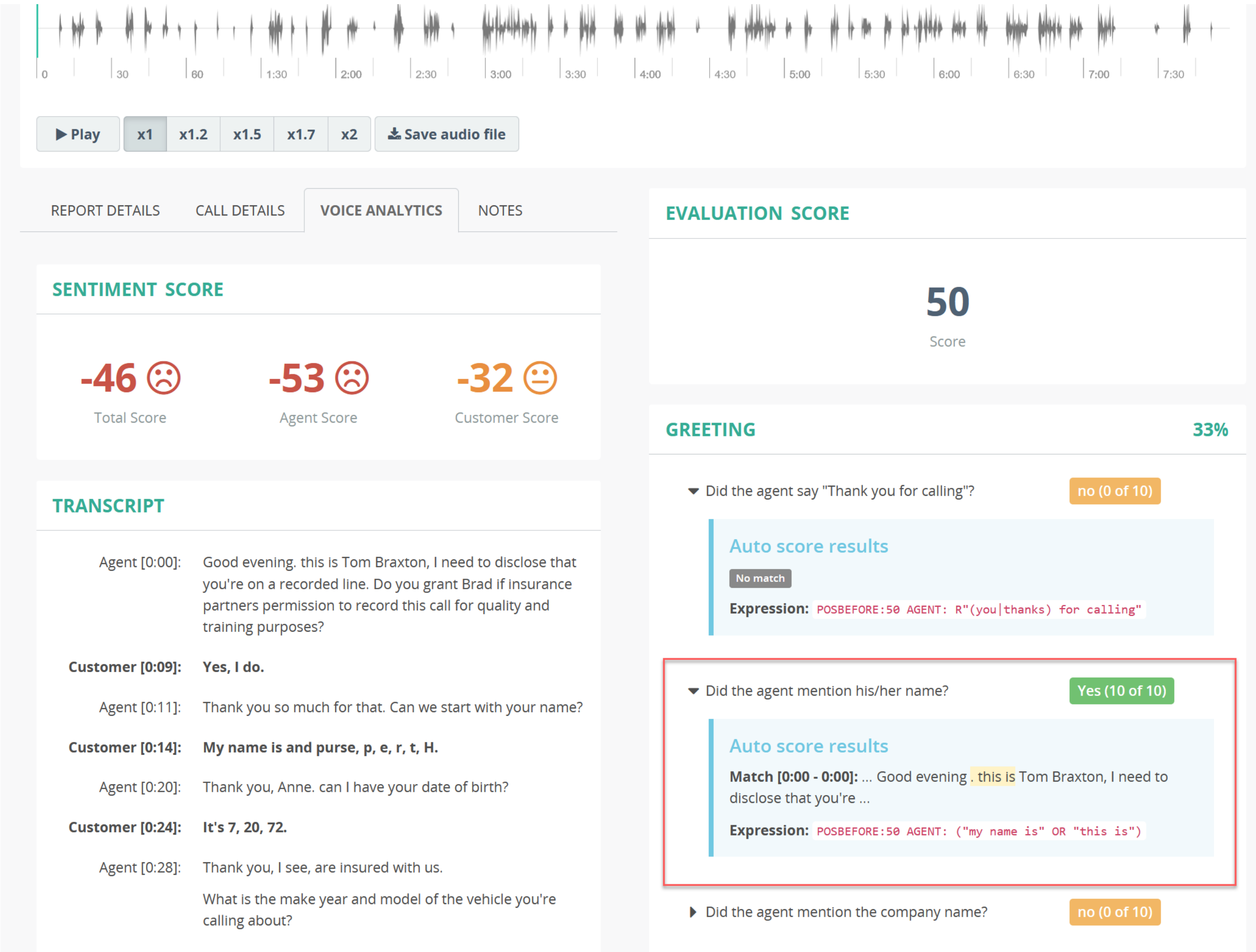
5. Auto scoring

5.1 Review Automatic Scores

To review the automatic score for an interaction, open the report details.

In the report, you will be able to see what conditions were matched and at what location in a transcript.

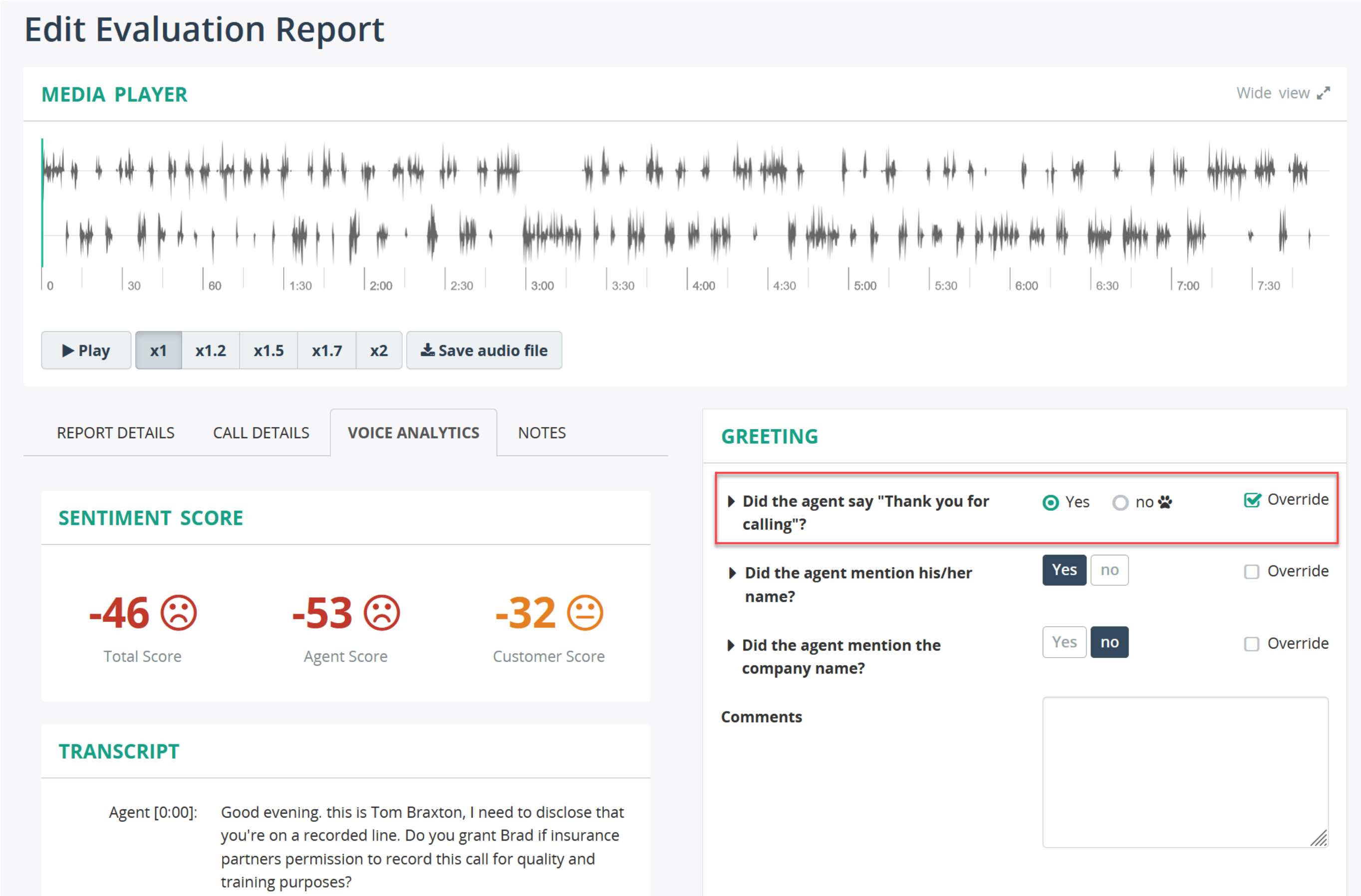
For example, in the following screenshot, the second question **Did the agent mention his/her name?** is matched because the agent said *this is Tom Braxton* at the beginning of the call.



5.1.1 Override score

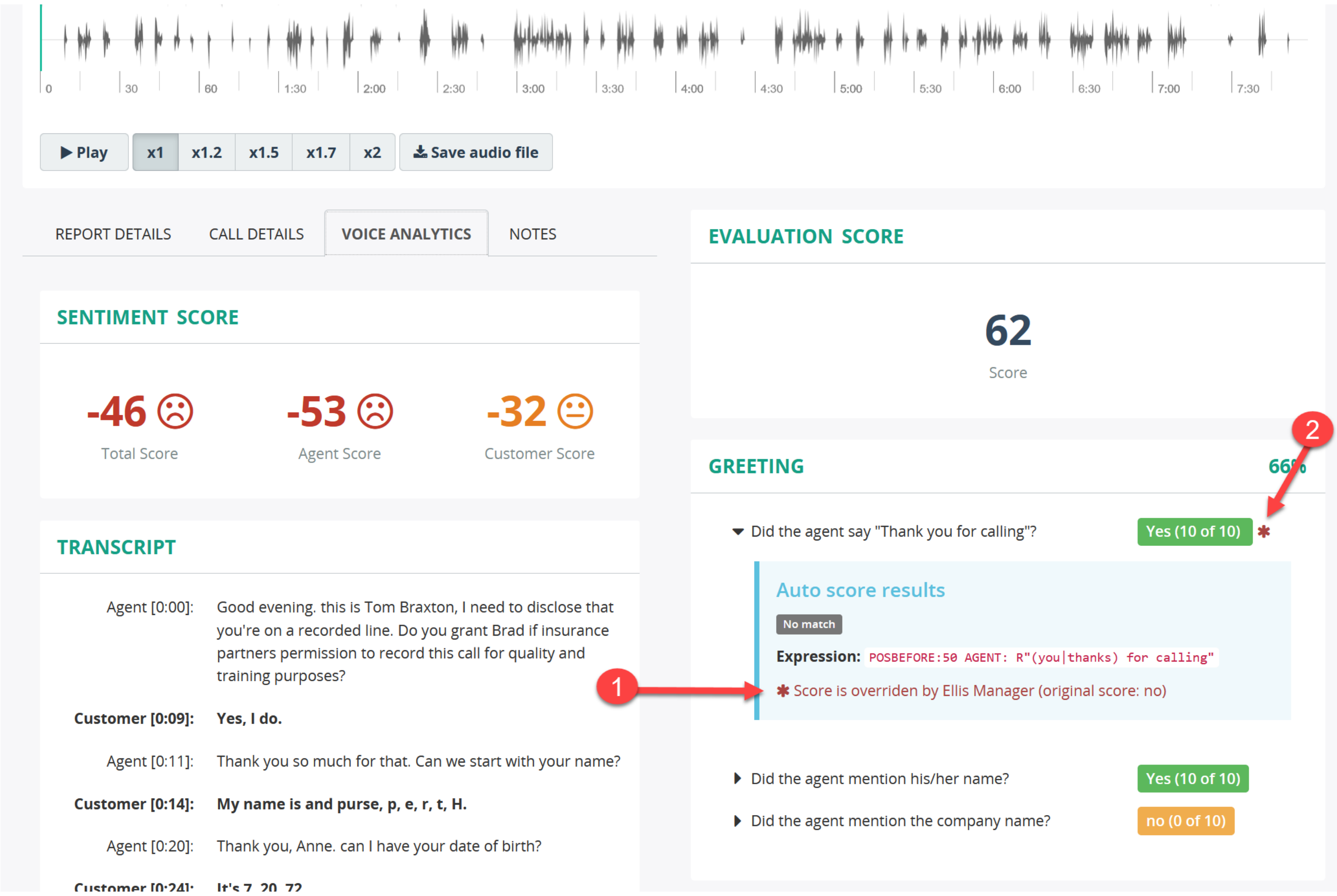
In some situations, the machine score may be incorrect, for example, when a speaker was using a vocabulary that was not expected by the designer of the scorecard.

In such a case, a reviewer can override the machine score by clicking **Edit Report** button and selecting **Override** option for the corresponding question.



After the report is saved, the score is automatically recalculated.

The questions that are overridden are marked with the star icon and the message **Score is overridden by ... (original score: ...)**.

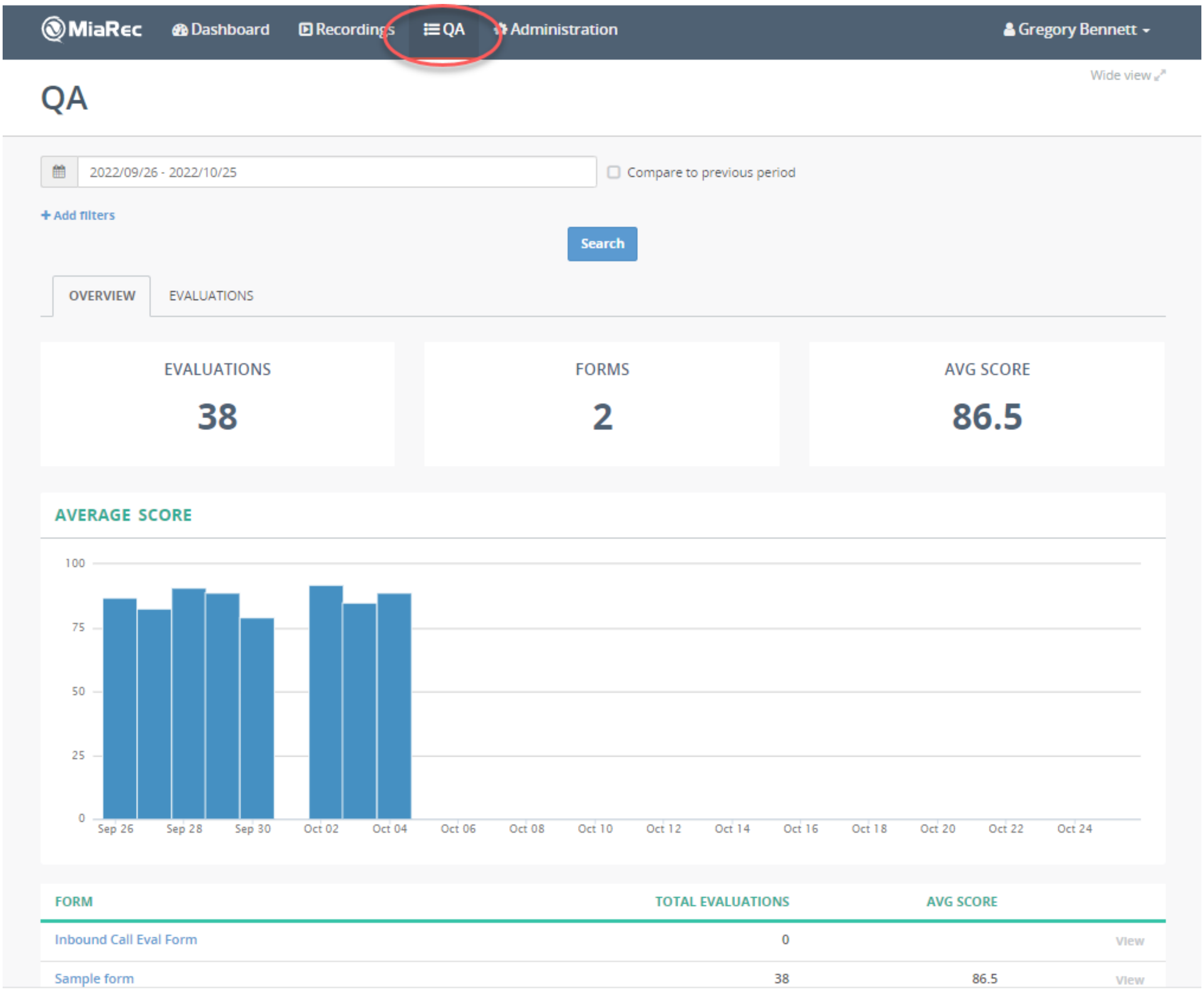

0
30
60
1:30
2:00
2:30
3:00
3:30
4:00
4:30
5:00
5:30
6:00
6:30
7:00
7:30
Play
x1
x1.2
x1.5
x1.7
x2
Save audio file
REPORT DETAILS
CALL DETAILS
VOICE ANALYTICS
NOTES
EVALUATION SCORE
62
Score
SENTIMENT SCORE
-46
Total Score
-53
Agent Score
-32
Customer Score
2
GREETING
66%
Did the agent say "Thank you for calling"?
Yes (10 of 10)
Auto score results
No match
Expression: POSBEFORE:50 AGENT: R"(you|thanks) for calling"
1
Score is overriden by Ellis Manager (original score: no)
Did the agent mention his/her name?
Yes (10 of 10)
Did the agent mention the company name?
no (0 of 10)
TRANSCRIPT
Agent [0:00]: Good evening. this is Tom Braxton, I need to disclose that you're on a recorded line. Do you grant Brad if insurance partners permission to record this call for quality and training purposes?
Customer [0:09]: Yes, I do.
Agent [0:11]: Thank you so much for that. Can we start with your name?
Customer [0:14]: My name is and purse, p, e, r, t, H.
Agent [0:20]: Thank you, Anne. can I have your date of birth?

6. Reporting and Dashboard

6.1 QA Dashboard

Once the call recordings have been evaluated, you can check evaluation results by navigating to the QA dashboard.

The QA dashboard is an intuitive visual reporting tool that provides useful statistics, such as an average, minimum and maximum agent's score for the given period, total evaluations for a specific group or agent, etc., This allows customer service managers and teams to monitor and optimize performance and spot emerging trends in a central location.



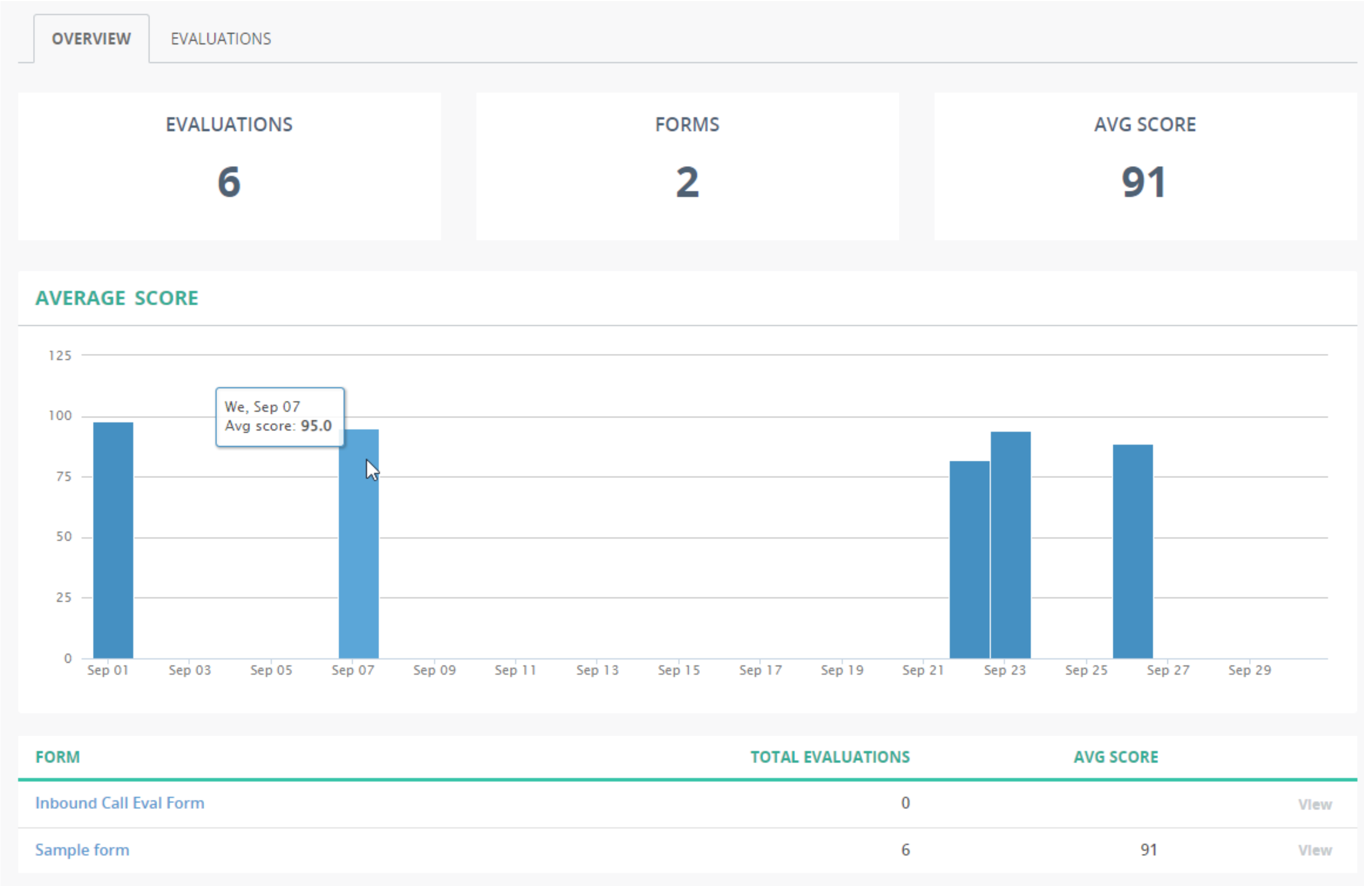
Key features of the QA dashboard:

- A dynamic view of the total number of evaluated recordings, the average score calculated, evaluation forms being used, and more.
- The drill-down analytics capability allows you to instantly shift from an overview of data to a more detailed and granular view within the same dataset they are analyzing by navigating to a group/user level.
- Comparing metrics over time to instantly measure changes by highlighting differences between two identical timeframes.

6.1.1 Overview Tab

The **Overview** tab displays the summary chart with the evaluation performance and provides information about the total number of evaluated recordings, evaluation forms used, and average score calculated.

You can view the number of evaluations per day within the chart by hovering the cursor over a point on the graph.

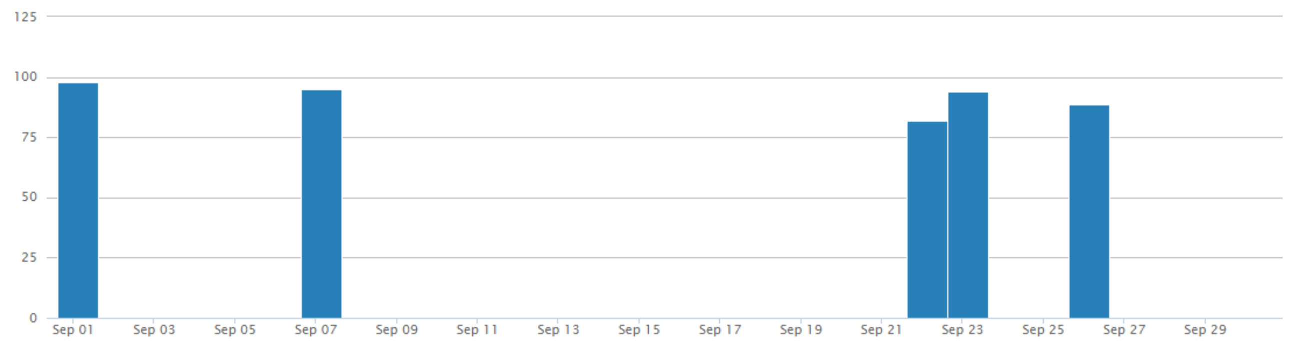


To view evaluation data based on a specific evaluation form used, click the form name at the bottom.

OVERVIEW | EVALUATIONS

EVALUATIONS	FORMS	AVG SCORE
6	2	91

AVERAGE SCORE

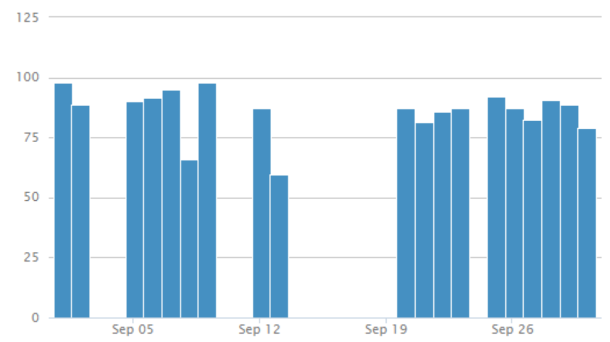


FORM	TOTAL EVALUATIONS	AVG SCORE	
Inbound Call Eval Form	0		View
Sample form	6	91	View

ALL GROUPS | EVALUATIONS

COMPLETED EVALUATIONS	AVG SCORE
72	85.3

AVERAGE SCORE

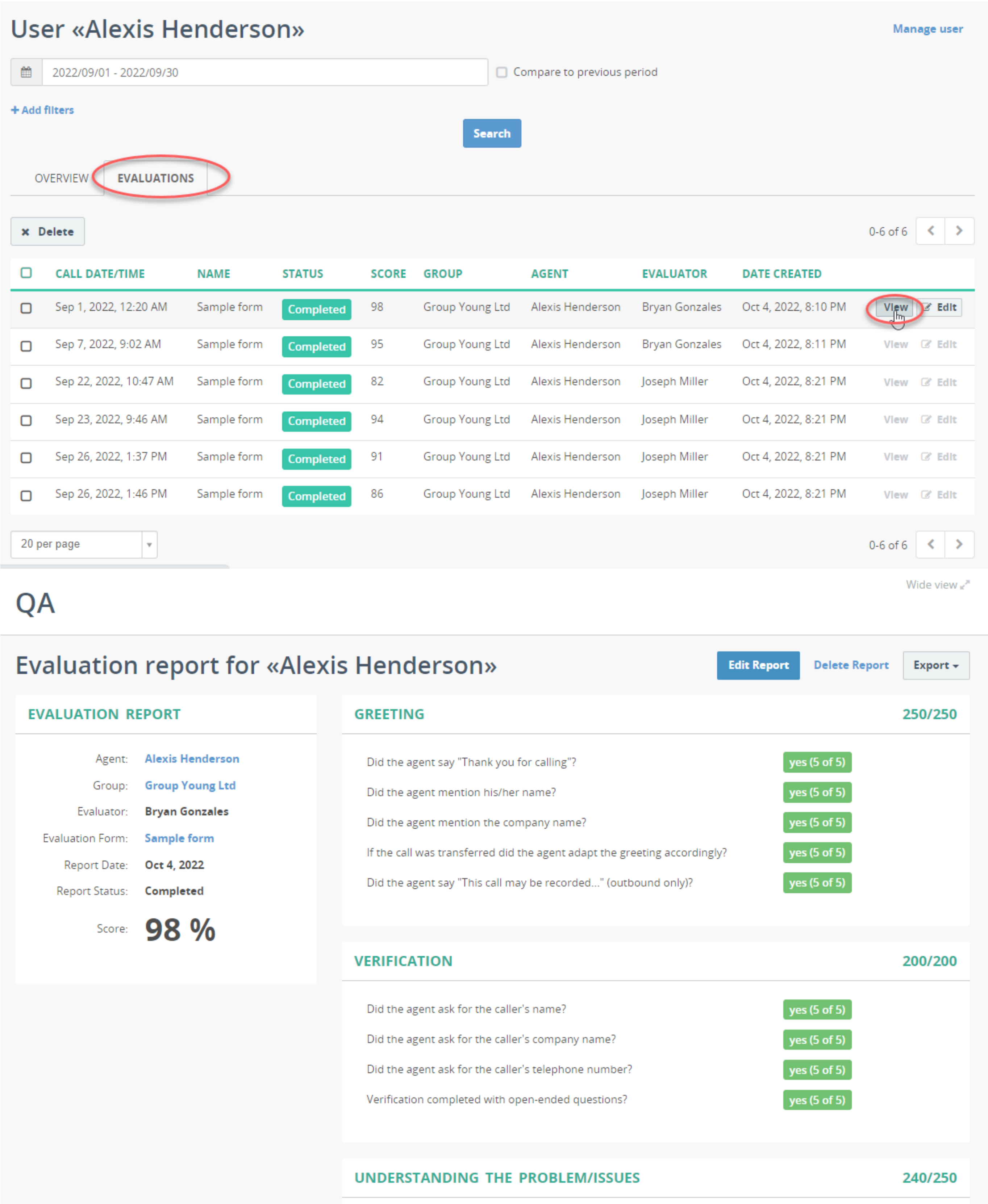


SECTION	AVG SCORE
Greeting	87.2
Verification	90.3
Understanding the problem/issues	83.7
Hold/Mute/Transfer	86
Problem resolution	64.7
Use of Tools	89.6
Closing	90.1

GROUP	EVALUATIONS	AVG SCORE	
Group Young Ltd	72	85.3	View

6.1.2 Evaluations Tab

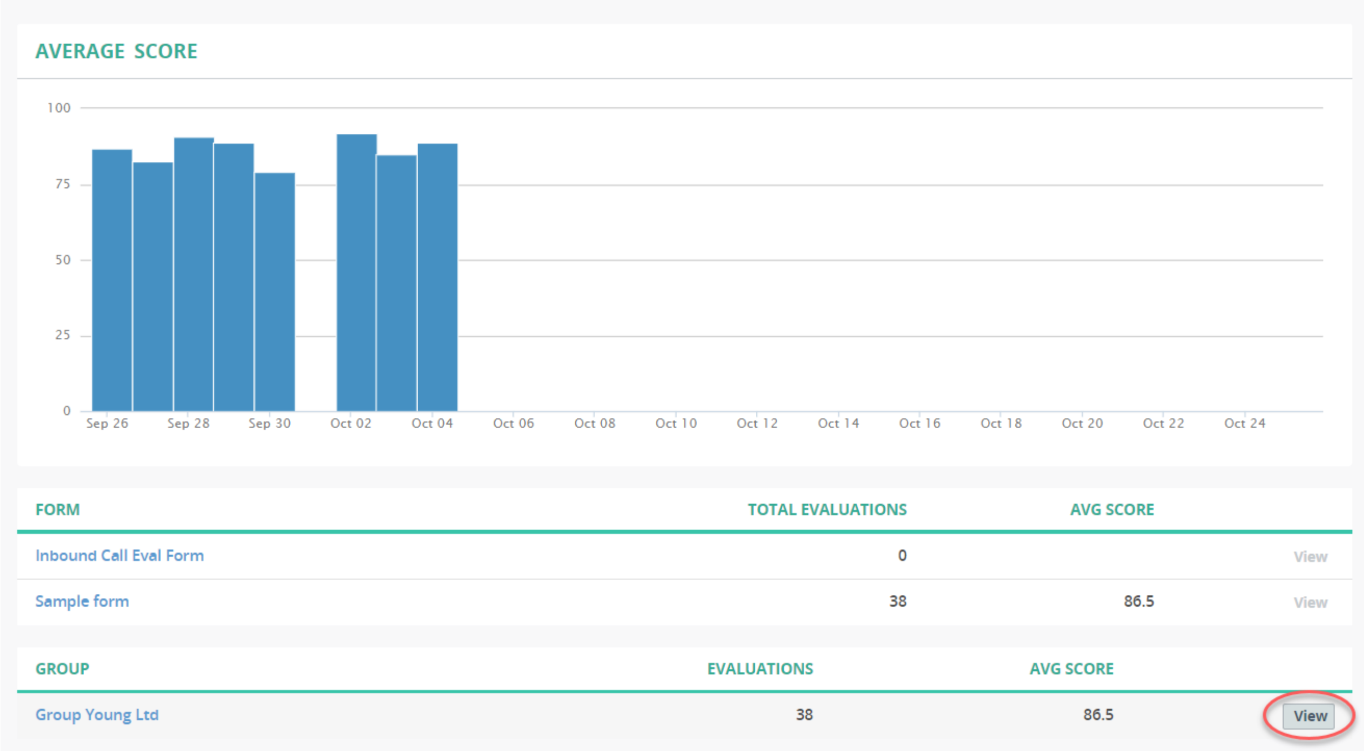
The Evaluations tab lists all evaluation reports being used for a specific group or user. You can open the most recent evaluation report by clicking the **View** button next to the report.



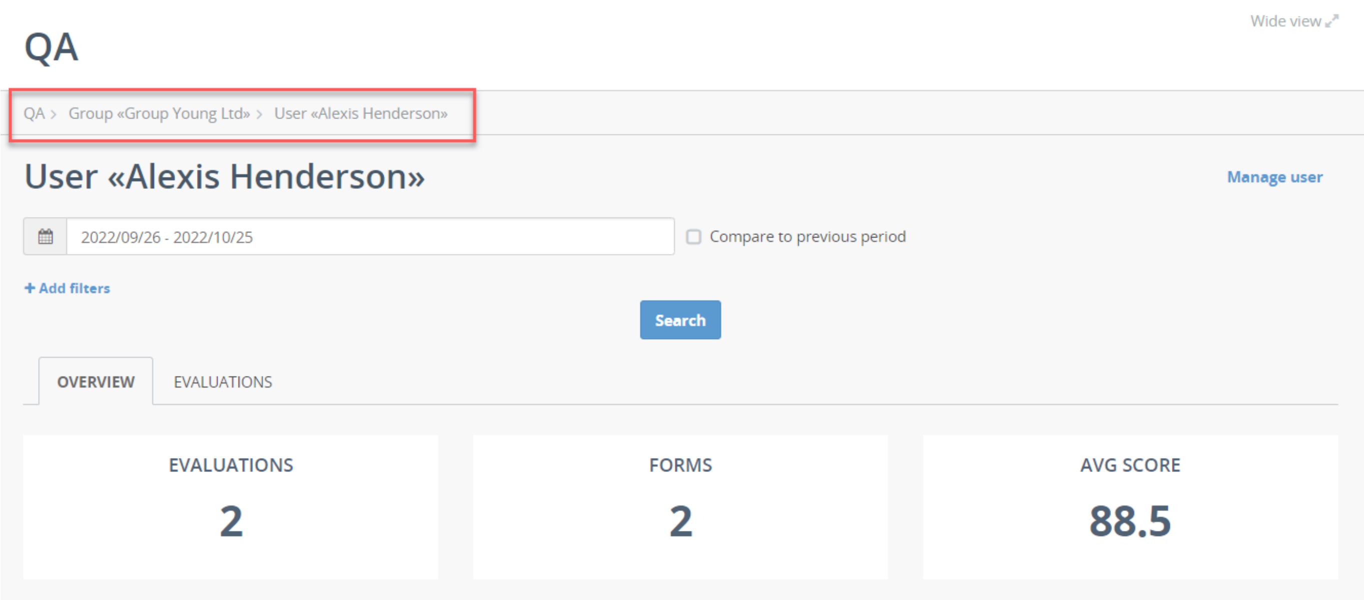
6.1.3 Drill-Down Capabilities

An intuitive graphical dashboard lets you quickly analyze group or user-level evaluation data.

To drill down dashboard data by groups and agents, scroll down to the table section and click the **View** button next to the group/ user.



You can also use the breadcrumb trail to quickly move up to the higher-level page.

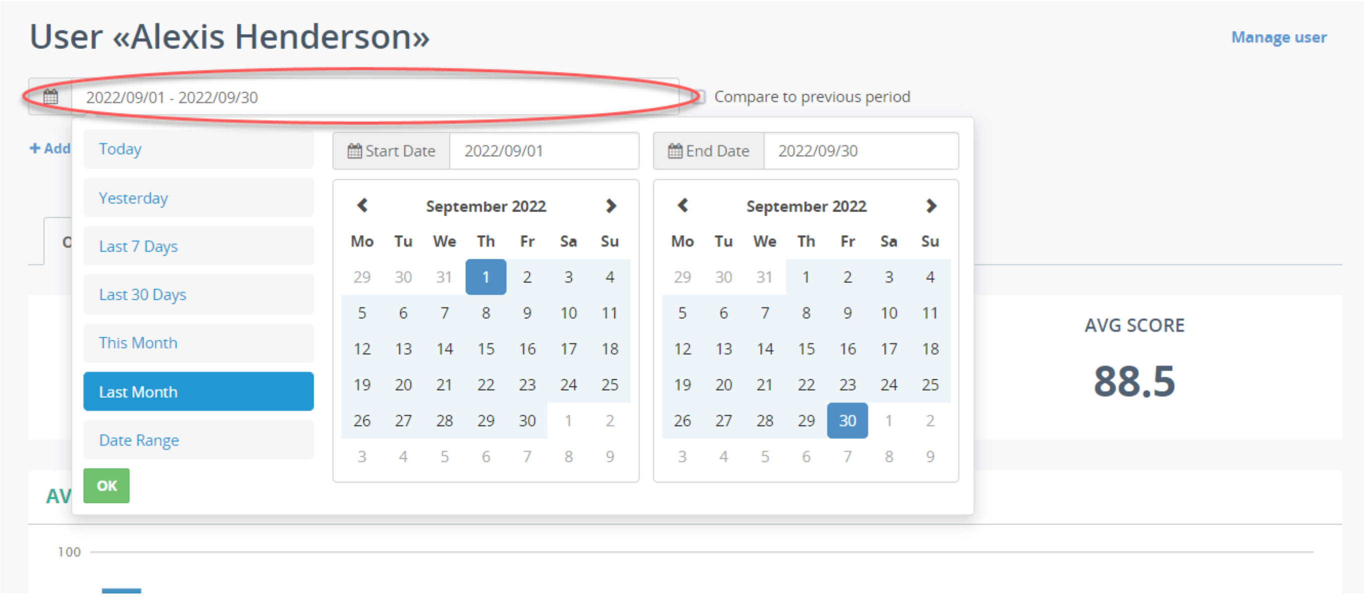


Select a date range

This search option lets you filter evaluation data within a specific range of dates.

To view the data by date range, click the date field and choose from one of the available options:

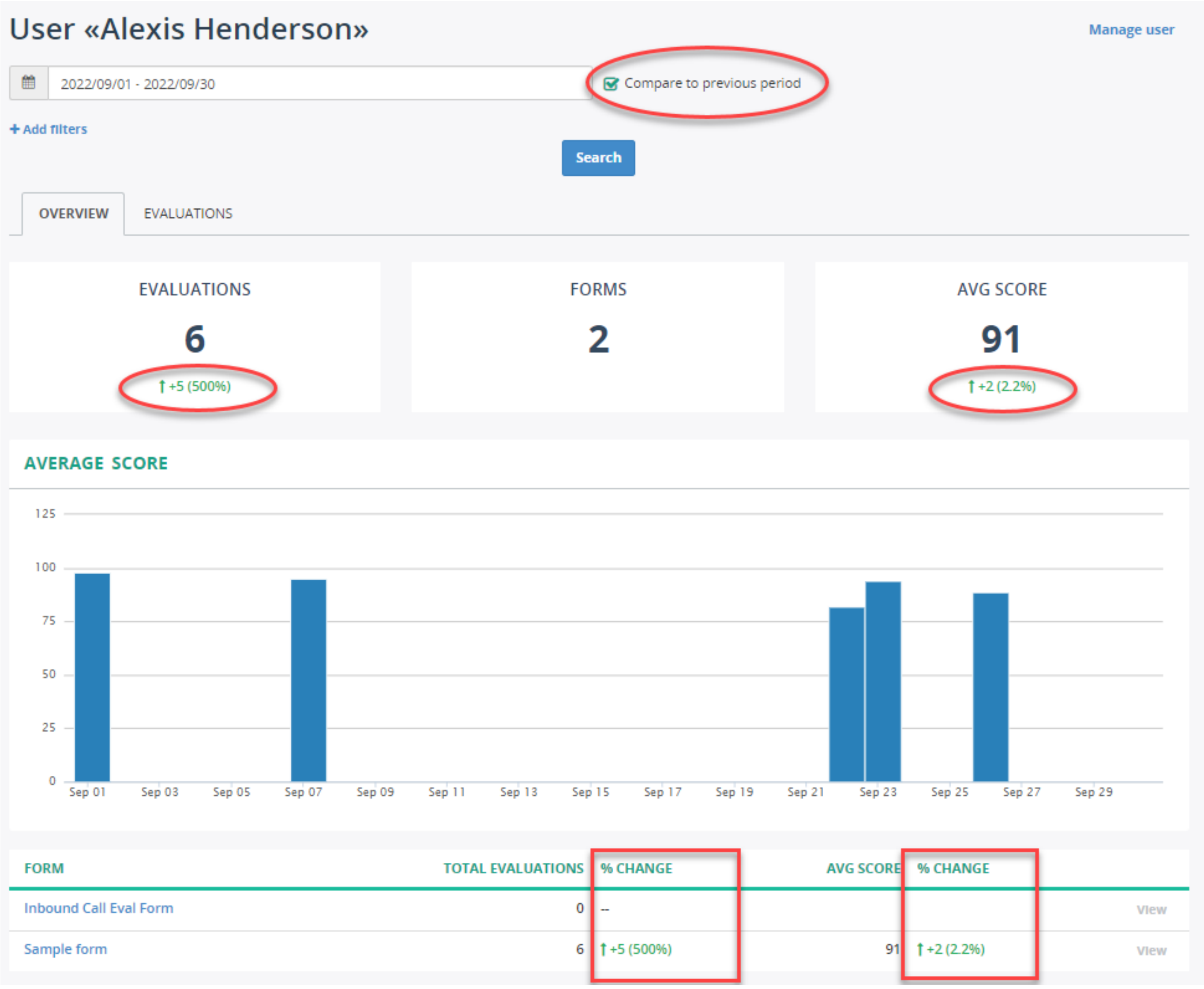
- Today
- Yesterday
- Last 7 Days
- Last 30 Days
- This Month
- Last Month
- Date Range



Compare to previous period

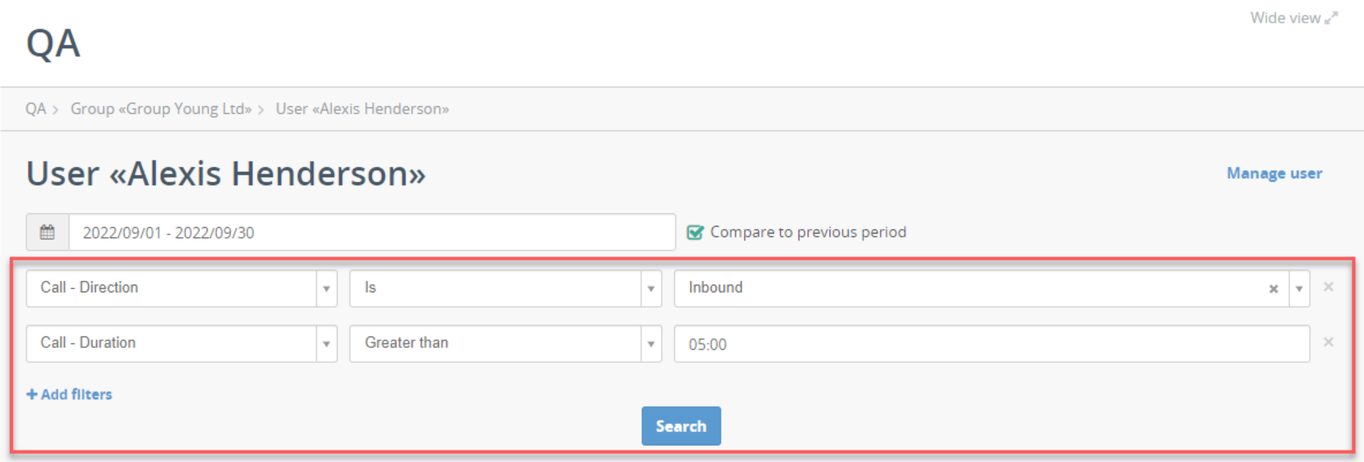
Comparing metrics over time is a great way to benchmark progress and identify issues as they come up.

If the **Compare to previous period** checkbox is selected, then all applicable metrics are calculated between two identical timeframes (for example between this week and a previous one) and a change in percentage is displayed.



Add Filters

Optionally, you can click **Add filters** to filter the evaluation data based on specific recordings. For example, the data based on call recordings by direction (only inbound calls) and duration (between 0:15 and 5:00).



Additional information may be found online at Momentum University or the MiaRec documentation center.