How Do I Create QM Evaluation Forms

QM Administrator

This topic is designed for QM Administrators.

QM Manager

This topic is designed for QM Managers.

Within Quantify QM, evaluation forms are used to track and score an agent's performance on call quality. This Quick Question topic covers designing and creating evaluation forms.

Designing evaluation forms usually involves QM Managers, QM Administrators, and other individuals in your organisation.

Creating an evaluation form in Quantify QM is usually performed by a QM Administrator, although some QM Managers may have permissions to create forms.

Design an Evaluation Form

Before you create an evaluation form, we recommend that you design the form first — consider the following:

- **Data**: Decide exactly what you're evaluating/capturing. For example, are you checking adherence to a script, or that an agent has communicated effectively. Similarly, consider whether you want to capture everything in a single form, or have different form types — for example, one for support calls, one for complaints.
- **Sections & Questions**: What questions will you ask (and how many) in order to evaluate, score and measure the data you want to capture. Also, decide how you want to group your questions together, if at all.
- **Scoring & Weighting**: Decide how you're going to score each question - for example, a simple Yes/No or a score of 0 to 5. Also, decide if you will lend more weight to certain questions and score appropriately.

A well designed evaluation form will help reduce evaluation time, capture the right data for your business, and provide a pathway for coaching and quality improvements.

Your Red Box system may look different to the one used in this document.

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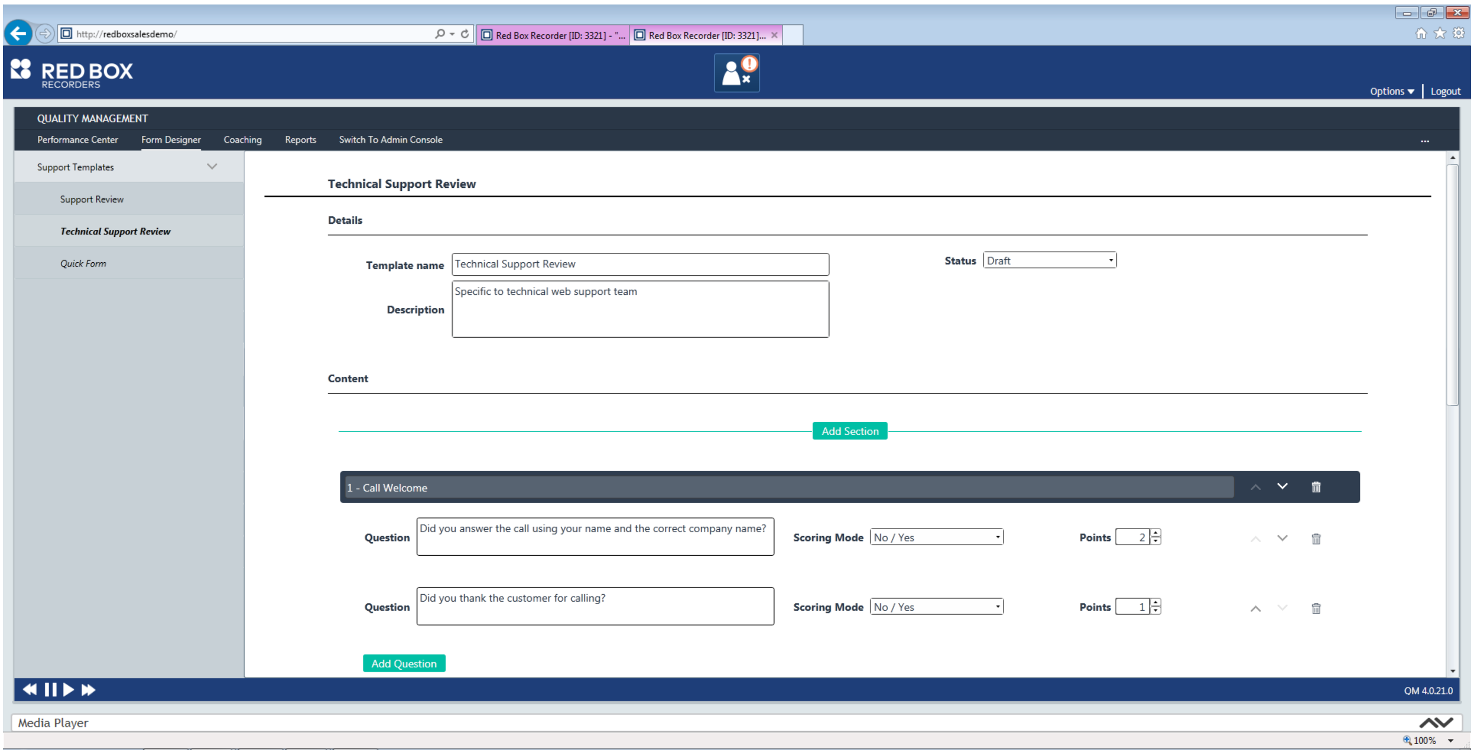
Create an Evaluation Form

Use the QM Form Designer to create your evaluation forms.

To create an evaluation form:

1. Login to Quantify with a QM Administrator account and go to **Quality Management** > **Form Designer**.
2. The first time you create a form, you'll need to create a folder structure to organise your forms — use the **Create SubFolder** and **Delete SubFolder** buttons as needed.
3. To create an evaluation form, click the **Add Template** button.
4. In the **Details** panel, enter a **Name** and **Description** for your form. While you're creating your form, leave the **Status** field set to **Draft**.
5. In the **Content** panel, type a section name into the **Section Title** banner. Use the **Add Section** buttons to add another section before or after the current section.
6. To add a question to a section, click the **Add Question** button. Enter the **Question** details, select a **Scoring Mode**, and select the total number of **Points** assigned to the question — see "Scoring Modes & Weighting" on page 3.
7. For sections and questions, click the ^ **Move Up**, v **Move Down**, and 🗑 **Delete** icons to rearrange or delete your sections and questions.
8. To save your draft evaluation form at any time, click the **Save** button at the bottom of the form.
9. When you're happy with your form layout and design, you can set the **Status** of the form to **Published** (in the **Details** panel) and click **Save**. This makes the form available to QM Managers. Once **Published** (and used once), an evaluation form can't be changed or deleted (only **Discontinued**). See "Form Status" on page 6 for more details.



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Scoring Modes & Weighting

You can select a scoring mode from one of the following default modes for each of your questions. Note that if these modes don't give you exactly what you need, you can create a customised scoring mode — see "Customised Scoring Modes" on page 4.

Once you select a scoring mode, you can then select the maximum number of points allocated to the question (if appropriate). This way, you can apply weighting to the question — either increasing or decreasing its importance/value across the overall form.

Mode	Description
No/Yes	**No** – 0% of points **Yes** – 100% of points
NA/No/Yes	**NA** – Not Applicable – Points discounted from total score **No** – 0% of points **Yes** – 100% of points
NA/No/Part/Yes	**NA** – Not Applicable – Points discounted from total score **No** – 0% of points **Y/N** – Yes & No, partially correct, 0% of points **Yes** – 100% of points
Sliding Scale 0-5	**NA** – Not Applicable – Points discounted from total score **0** – 0% of points **1** – 20% of points **2** – 40% of points **3** – 60% of points **4** – 80% of points **5** – 100% of points
Traffic Lights	**Red** – 0% of points **Amber** – 50% of points **Green** – 100% of points
Comments	Text field only. No associated points.

Advanced Form Design

You can use the QM Admin Console to set advanced features for your evaluation forms.

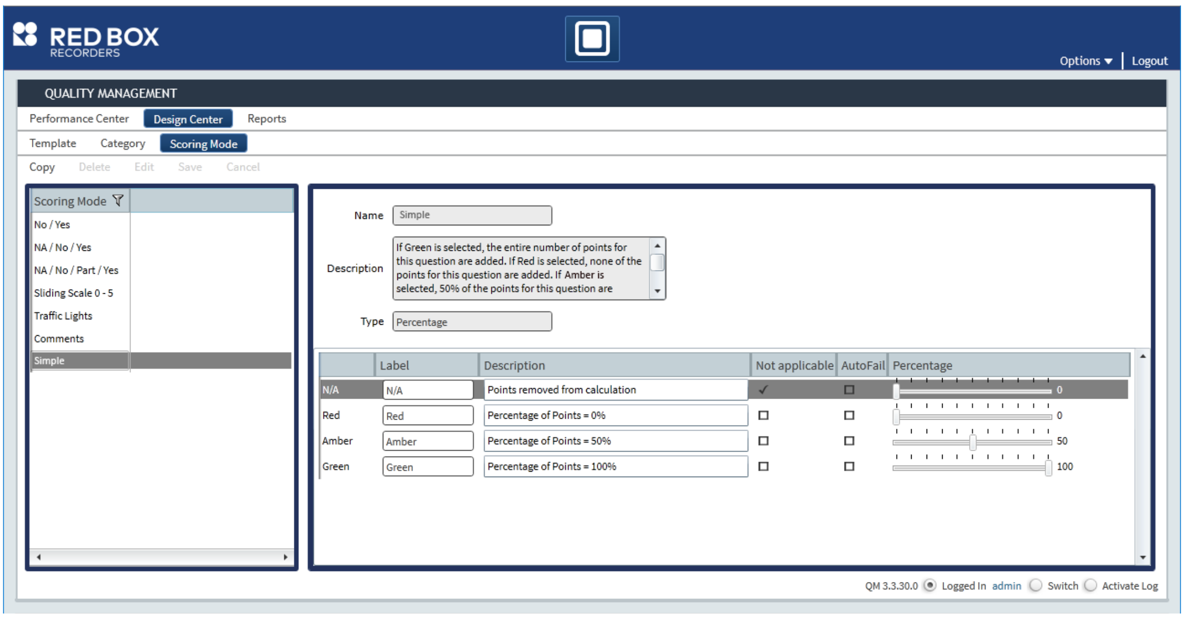
Note that Red Box recommends that you don't use any of the other features provided by the console. These have been retained in order to support legacy customers and should not be used for general QM admin.

Customised Scoring Modes

If the default set of six scoring modes don't quite satisfy your requirements, you can create your own scoring modes based on the six default modes. Once you've created a customised mode, it becomes available for use in new evaluation forms in exactly the same way as the default modes.

To create a customised scoring mode:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions) and go to **Quality Management** > **Switch to Admin Console**.
2. In the console menu bar, click **Design Center** > **Scoring Mode**.
3. The six default scoring modes are shown in the **Scoring Mode** list. Highlight the default scoring mode that gives you the closest match to the mode you want to create, and click **Edit** in the console menu bar.
4. You can now edit the scoring mode. First, update the **Name**, **Description** and **Type**, as needed. Now edit each **Score** as required:
   - **Label**: Score label displayed in an evaluation form.
   - **Description**: Description of the score.
   - **Not Applicable**: Defines the score as "Not Applicable". If the score is selected in an evaluation form, no points are assigned and the maximum number of points for the question are discounted from the overall score.
   - **AutoFail**: Defines the score as "AutoFail". If the score is selected in an evaluation form that has the **AutoFail** option applied, the evaluation may be automatically failed with a zero score. See "AutoFail" on page 5.
   - **Percentage**: Slider to set the percentage of points allocated to this score.
5. When you're done, click the **Save** button to save your changes.
6. Once you've created a customised scoring mode, you can **Copy**, **Edit** and **Delete** it as needed.



AutoFail

There may be circumstances where a particular score for a question means that the evaluation should be regarded as a "Fail". For example, PCI compliance, data protection rules, or regulatory compliance. Quantify QM provides an AutoFail feature to automatically fail an evaluation and apply a zero score to the whole evaluation.

To enable AutoFail:

1. Select the AutoFail option within your scoring modes.
2. Enable the AutoFail option within an evaluation form.

Note that AutoFail impacts QM Reports that use evaluation scores so you may decide this unrealistically skews the data.

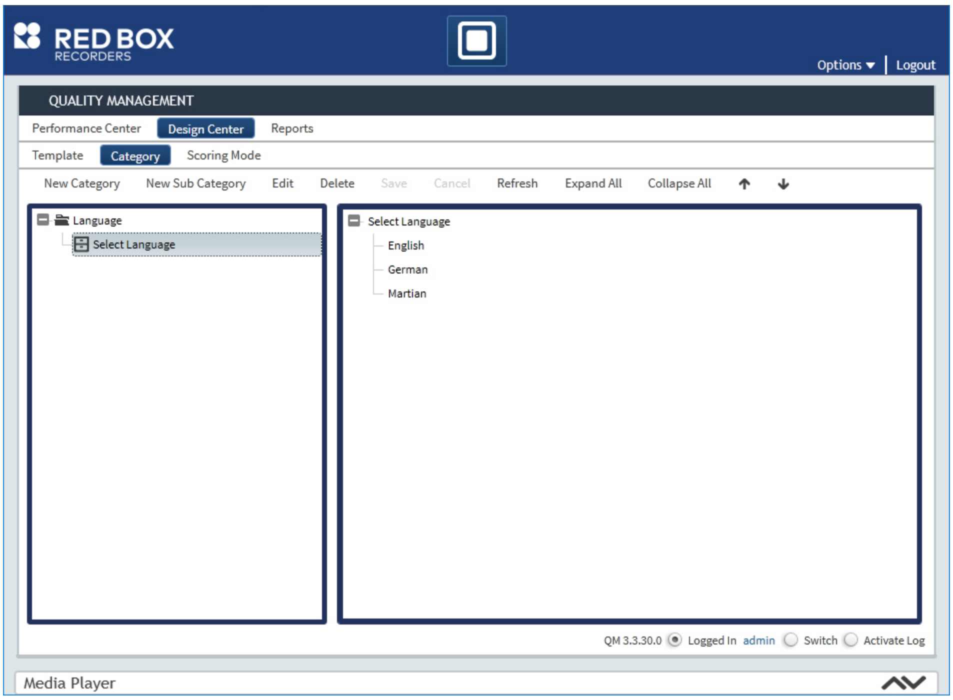
For full details on how to implement AutoFail, please see the "AutoFail" Quick Question topic.

Categories

You can use categories to organise your evaluations. For example, if you have multiple languages in your organisation, you could create a set of language categories — when a QM Manager starts an evaluation, they'll be prompted to select a category which then "tags" the evaluation with that category. The category tag can then be used to organise and filter evaluations in the QM Performance Center and in QM Reports.

To create and manage categories:

1. Login to Quantify with an administrator account (User Management and System Configuration permissions) and go to **Quality Management** > **Switch to Admin Console**.
2. In the console menu bar, click **Design Center** > **Category**.
3. The first time you create a category, you'll need to create a folder structure — use the **New Folder** and **New SubFolder** menu options as needed.
4. To create a category, click the **New Category** or **New SubCategory** menu option as needed. Enter a short descriptive label for the category and tick the **Show** option to make the category visible within QM. When you're done, click the **Save** button.
5. Use the **Edit** and **Delete** menu options to edit and delete the highlighted folder or category.



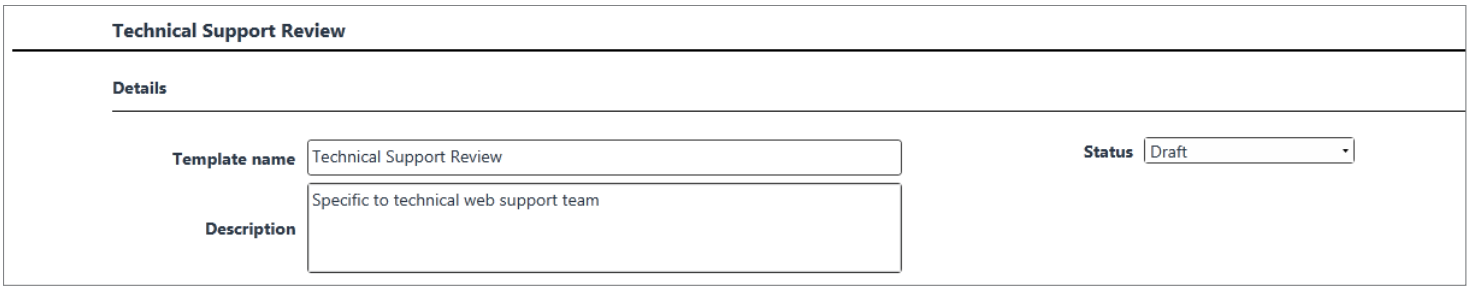
Update Form Status

As you create and manage your evaluation forms in the QM Form Designer, use the **Status** field to publish, discontinue, and reintroduce your forms.

To update the status of an evaluation form:

1. Login to Quantify with a QM Administrator account and go to **Quality Management** > **Form Designer**.
2. Highlight an evaluation form in the list.
3. Set the **Status** field as needed – see below.
4. When you're done, click the **Save** button at the bottom of the form.

Status	Description
Draft	Use this status while you're designing your form. **Draft** allows the evaluation form to be deleted or edited as needed. Draft evaluation forms are not available/visible outside of the **Form Designer**.
Published	When you're happy with a form layout, and you want to make the form available to QM Managers for use in evaluations, set the status to **Published**. Once **Published** (and used once), an evaluation form can't be changed or deleted (only **Discontinued**).
Discontinued	If you want to stop using an evaluation form, set the status to **Discontinued**. This simply makes the form unavailable for future evaluations, but still retains the form in QM so it remains visible/usable for historical evaluations. As such, the form still can't be changed or deleted (only **Reintroduced**).
Reintroduced	If you want to make a **Discontinued** evaluation form available again, set the status to **Reintroduced**. This is very similar to **Published** – that is, the form is available to QM Managers for use in evaluations and can't be changed or deleted (only **Discontinued**).



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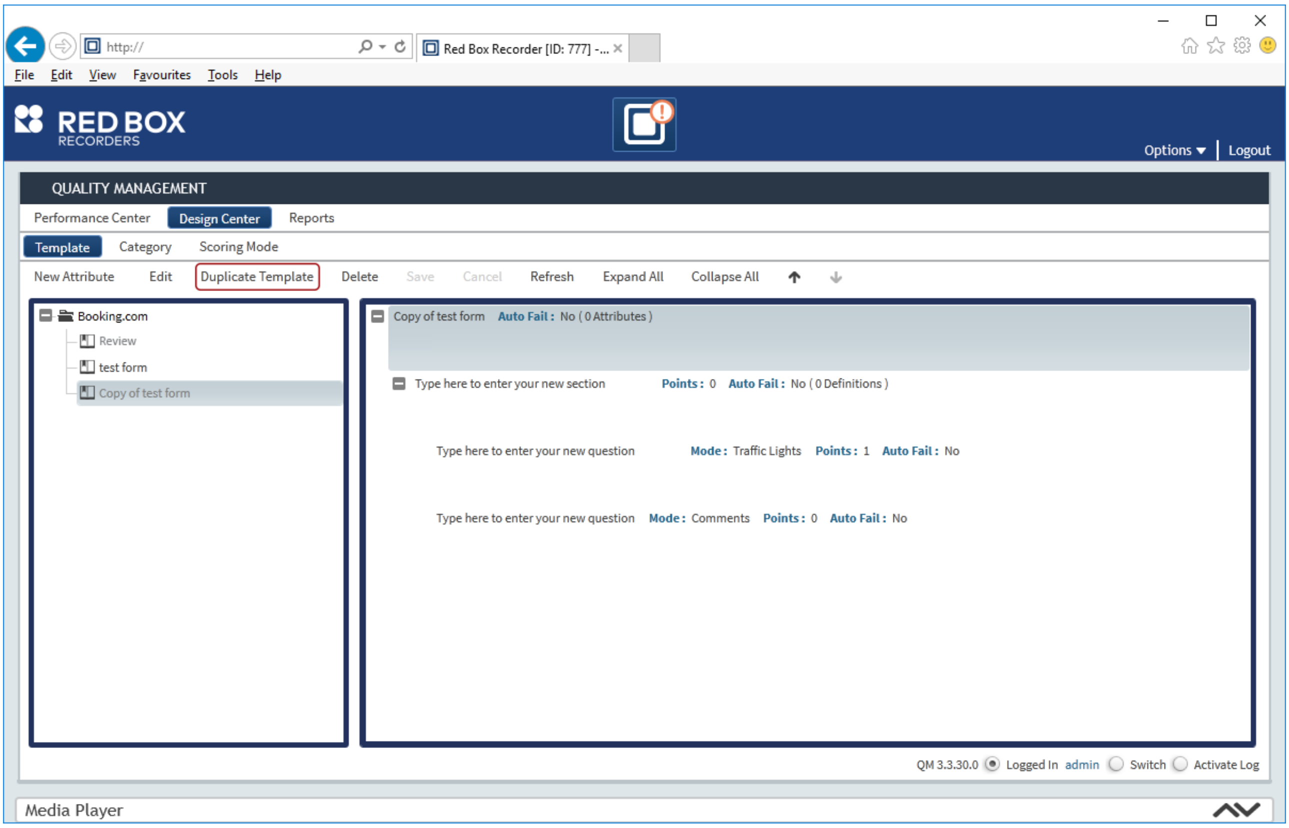
Change an Evaluation Form

Once an evaluation form has been published, it can't be changed or deleted. However, things change over time and it's likely that you'll want to update your evaluation form to meet your changing business needs.

To create a new/updated evaluation form, you can either use the QM Form Designer to simply create a new form (see "Create an Evaluation Form" on page 2) or you can use the QM Console to create a copy of an existing form and then use the Form Designer to make modifications — see below.

To copy an evaluation form and update:

1. Login to Quantify with a QM Administrator account and go to **Quality Management** > **Switch to Admin Console.**
2. In the console menu bar, click **Design Center** > **Template**.
3. Highlight an evaluation form in the list and click **Duplicate Template** in the console menu bar. This creates a copy of the evaluation form – you should see the new form in the list, titled "**Copy of <form name>**".
4. Now switch to the QM Form Designer to make your changes — select **Quality Management** from the Quantify main menu and then click **Form Designer**.
5. Use the QM Form Designer to make your changes and publish your new form.



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Sample Sections & Questions

The following sample sections and questions are purely for help and guidance, and are not meant to act as a definitive list of questions or the basis of a form design.

Greeting
• The agent adhered to the greeting script.
• If the call was transferred, the agent adapted their greeting as appropriate.
• The agent gave their name and asked for the caller's name.
• The agent mentioned the company name.
• The agent thanked the customer for calling.
• The agent offered assistance to the caller.

Account Verification
• The agent verified the customer's account using the appropriate information (e.g., first and last name spelling, account number, credit card number, transaction number, social security number, amount of previous bill or purchase, etc.).
• The agent accurately accessed the customer's account with the information provided.
• If the call was transferred, the agent sufficiently adapted their account verification questions accordingly.

Contact Information Confirmation
• The agent confirmed the spelling of the caller's name.
• The agent asked for the caller's company name.
• The agent asked for the caller's phone number.
• The agent asked for the caller's email address.
• The agent asked for the caller's postal address and postcode.

Problem Solving Abilities
• The agent apologised for the issue, inconvenience or cost associated with the problem.
• The agent took ownership of the problem.
• The agent asked relevant questions to accurately diagnose the problem.
• The agent used appropriate resources to address the issue.
• The agent provided the most appropriate solution.
• The agent informed the customer of the estimated timescale to resolve their issue.
• The agent informed the customer of relevant supporting documentation to help resolve the issue.
• The agent provided a reference number to the customer after resolving their issue.
• The agent confirmed that the issue was resolved or the transaction was complete.
• The caller's issue was sufficiently addressed.
• The agent informed their colleagues of a new bug, issue, or product defect.

Protocol Compliance
• The agent updated the customer's contact information in the CRM.
• The agent documented important information in the notes of the call.
• The agent used authorised prices, discounts, refunds.
• The agent quoted the customer with the correct price for the product or service.
• The agent recommended the most appropriate product, service, or price plan.
• The agent leveraged upselling and cross-selling opportunities.
• If the customer asked where the agent was located, the agent provided them with an accurate answer.

Call Handling Skills
• The agent followed correct procedures for placing the customer on hold.
• The agent followed correct procedures for transferring the call.
• The agent followed correct procedure for conferencing in a colleague.
• The agent followed correct procedures for escalating a call to their supervisor/manager.

Customer Service Quality
• The agent used the caller's name throughout the call.
• The agent summarised the customer's main points before troubleshooting or offering a solution.
• The agent adequately addressed the caller's needs.
• The agent answered the customer's question correctly.
• The agent muted the caller when appropriate.
• The agent received the caller's permission to place them on hold before doing so.
• The agent limited the duration of hold time to the approved time limit.
• The agent transferred the call to a colleague when necessary.
• The agent conferenced in a colleague when appropriate.
• The agent transferred the call to a manager when the customer requested for them to do so.

Call Center Etiquette
• The agent pronounced the caller's name correctly.
• The agent maintained proper tone, pitch, volume and pace throughout the call.
• The agent used courteous words and phrases.
• The agent was friendly, polite and professional.
• The agent adapted their approach based on the customer's unique needs, personality and issues.
• The agent avoided long silences during the call.
• The agent didn't interrupt or talk over the customer.
• The agent used effective listening skills.
• The agent refrained from using complicated jargon.
• The agent remained confident throughout the call.

Script Compliance
• The agent maintained adherence to the script.
• The agent deviated from script when necessary.
• The agent adequately adapted their approach to interacting with the customer, within guidelines, where necessary.

Closure
• The agent adhered to the call closure guidelines.
• The agent adhered to the call closure script.
• The agent arranged for a follow-up call when necessary.
• The agent asked the customer if they have any additional questions or issues before ending the call.
• The agent asked the caller if the service they were provided was within their standards.
• The agent asked their caller if there is anything they can do to enhance the service they provide them.
• The agent thanked the customer for calling.

Follow-up
• The agent followed up with the customer within the agreed timeframe.
• The agent adequately addressed the customer's questions.
• The agent adequately resolved the customer's issue, or provided a timescale for resolution.

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