QuickQuestion

How Do I Evaluate a Call

QM Manager

This topic is designed for QM Managers.

As a QM Manager you can evaluate calls for the agents in your team or department. This Quick Question topic covers the full evaluation process. For information on managing your evaluations (review, edit, and data visualisation), see the "Manage Evaluations" QQ topic.
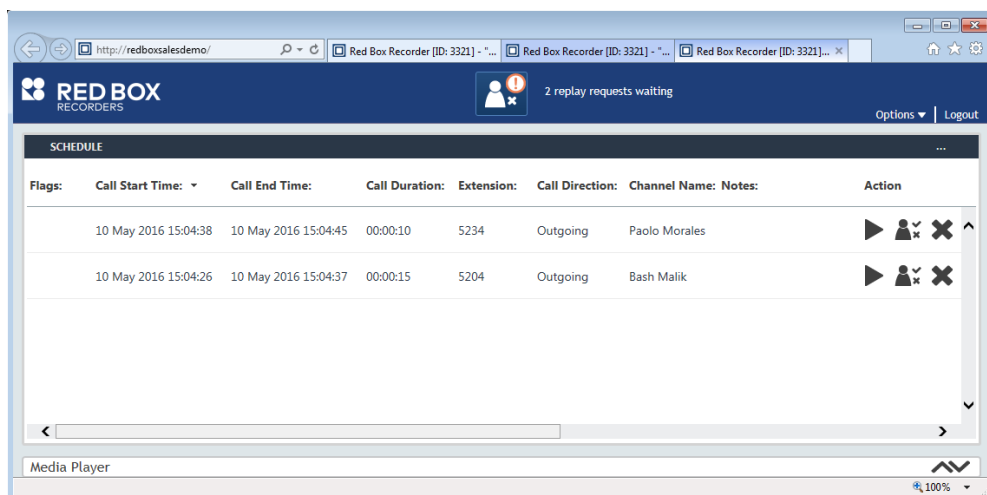
At a Glance

To evaluate a call:

1. Login to Quantify with a QM Manager account, and select **Quality Management** from the Quantify main menu.

2. You will be taken straight to your QM Schedule which lists all the calls automatically assigned to you for evaluation. In the **Action** column you can click ▶ **Play** to review the call, ✖ **Reject Call** to reject the call, or 👤 **Evaluate Call** to start the evaluation.

3. Click 👤 **Evaluate Call** and complete the evaluation form, scoring each question and adding notes. Use the Quick Control buttons or the Media Player to control call playback.

4. When you're done, click **Complete** to save and finish your evaluation, or click **Save & Close** to save a draft and come back to it later (see "Finish an Incomplete Evaluation" on page 3).

Note that you can also perform an unscheduled "ad-hoc" evaluation:

• From the QM Performance Center, highlight an agent and select **Evaluate** from the ⋯ **Menu**.

• From Search & Replay, highlight a call and click the 👤 **Evaluate Call** button. Note that you can only evaluate calls for agents in your QM team or department.

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

Your QM Schedule lists all the calls that have been automatically assigned to you for evaluation. From here, you can ▶ **Play**, 👤 **Evaluate**, or ✖ **Reject** your calls.

The Calls List provides a lot of information about each call, but you can organise the list the way you like it.

- To list calls in a particular order, click a column heading – for example, list by start time.
- To change the order of columns, just drag & drop.
- To show or hide columns in the list, click the triangle next to any column and simply select or deselect a column.

Your QM Schedule is automatically displayed whenever you open Quantify QM (as a QM Manager). To go to the main Quality Management home page, select **Load QM** from the schedule ••• **Menu**.

Lastly, if you need to reject all the calls in your schedule and replace them with a fresh list (for example, when returning from holiday), select **Refresh** from the schedule ••• **Menu**.

Evaluation Options

During an evaluation:

- To cancel an evaluation without saving it, click the **Cancel** button.
- To save an evaluation and come back to it later, click the **Save & Close** button.
- The completion status is shown at the bottom of the screen. Once all questions have been scored (100% complete), click the **Complete** button to save and complete the evaluation.
- You can also use the evaluation ••• **Menu** to **Print** the evaluation.

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Finish an Incomplete Evaluation

If you've used the **Save & Close** button during an evaluation, this will have saved a draft of the evaluation. You can then use the QM Performance Center to return to, and finish, the incomplete evaluation.

To finish an incomplete evaluation:

1. Go to the QM Performance Center.

   - From your QM Schedule, select **Load QM** from the schedule ••• **Menu**.
   - From the Quality Management home page, just click the **Performance Center** tab.

2. Highlight a team or agent to list the available evaluations.

3. Incomplete evaluations are highlighted by the ⬜⚠ **Incomplete Evaluations** flag (they also have no **Score**). To update the evaluation, click the ⮌ **Review** icon in the **Action** column.

4. Complete the evaluation form, scoring each question and adding notes. Use the Quick Control buttons or the Media Player to control call playback.

5. The completion status is shown at the bottom of the screen. Once all questions have been scored (100% complete), click the **Complete** button to save and complete the evaluation.

   Note that if you still haven't completed the evaluation, you can click **Save & Close** to save your changes and come back to it later, or click **Cancel** to exit without saving.

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