

How Do I Use QUANTIFY QM

QM Manager

This topic is designed for QM Managers.

Quantify Quality Management (or Quantify QM) is used for call quality monitoring and performance assessment. Quantify QM helps you to assess, record, maintain, and improve customer service quality.

This Quick Question topic provides an overview of using Quantify QM to perform evaluations and manage your departments, teams, and agents. Please refer to the other QQ topics in this series for more detailed information on using the different parts of Quantify QM.

QM Structure

Quantify QM uses three user types:

- **QM Agent:** An individual in your organisation who has their calls recorded, monitored, and evaluated.
- **QM Manager:** This is probably you. A QM Manager can perform evaluations, run reports, and manage their teams and departments.
- **QM Administrator:** A QM Administrator has responsibility for system configuration and can create and assign users, evaluation forms, and evaluation schedules.

To organise managers and agents, Quantify QM uses two structure types:

- **Department:** A department can contain other departments (sub-departments) and/or teams. A department manager (QM Manager) has access to all associated QM data for anything within their department.
- **Team:** A team contains agents. Like a department, a team manager (QM Manager) has access to all associated QM data for their team.

Your user types and organisational structure will be set up by your QM Administrator.



QM Administrator

QM configuration and administration.

QM Manager

Evaluates agent calls.
Manages assigned departments and teams.

QM Agent

Calls are recorded and evaluated. QM access is limited.

Department

Contains sub-departments and teams. Has assigned Department Manager (QM Manager).

Team

Contains agents. Has assigned Team Manager (QM Manager).

QM Navigation

Quantify QM has been designed to provide ease of use, with a simple workflow — from schedule, to evaluation, to review, to reports, and finally, coaching.

With that workflow in mind, Quantify QM is essentially split into five main areas:

- **Schedule:** Lists all the calls that have been automatically assigned to you for evaluation. As a QM Manager, your schedule is opened by default whenever you open QM from the Quantify main menu. To go to the other parts of QM, click the **⋮ Menu** icon in the schedule and select **Load QM**.
- **Evaluation Form:** Used to evaluate and score an agent's performance on call quality. The evaluation forms you use will be completely unique to your organisation, and designed to cover your specific evaluation criteria.
- **Performance Center:** Used to review and manage evaluations across departments and teams.
- **Reports:** Help you to summarise and visualise your evaluation data.
- **Coaching:** Used to assign specific learning objectives to individual agents.
- A final section, **Form Designer**, is used to review the evaluation form types that are available to you. For QM Administrators, this section also allows an administrator to design and create new evaluation forms.

The image displays a collage of screenshots from the Quantify QM software interface, illustrating the five main areas:

- Schedule:** A screenshot showing a list of calls with columns for Call ID, Call Date, Call Time, Call Status, Call Type, and Agent Name.
- Evaluation Form:** A screenshot showing a form with various questions and checkboxes for evaluating call quality.
- Coaching:** A screenshot showing a coaching plan with columns for Assigned Date, Reviewed Date, Reference, and Comments.
- Performance Center:** A screenshot showing a table of evaluations with columns for Evaluation Date, Evaluation Form, Evaluator, and Agent.
- Reports:** A screenshot showing a dashboard with various charts and graphs, including Evaluation Tracking, Training Needs, and Headline Score Tracking.

Evaluate a Call

To evaluate a call:



1. Login to Quantify with a QM Manager account.

If you're not taken straight to Quantify QM, open the **Quality Management** application from the Quantify main menu. As a QM Manager, this will take you to your schedule, assuming a schedule has been assigned to you.

2. Your Quantify QM Schedule lists all the calls that have been automatically assigned to you for evaluation. From here, you can select calls to review, reject, and evaluate:

- **Review:** In general, we recommend that you review or screen a call before evaluating it. That way, you can reject the call if you need to, and save a little time. To play a call, click the **▶ Play** button in the **Action** column. Use the Media Player to control feedback — see the Media Player Quick Question topic for details.
- **Reject:** Once you've reviewed the call, if you think the call is not appropriate to evaluate (prank call, lost connection, etc) click the **✖ Reject** button in the **Action** column. You can also reject all calls in your schedule and refresh the list — select **Refresh** from the **⋮ Menu**. You'll be prompted to enter a reason for rejecting calls.
- **Evaluate:** Once you've reviewed the call, if you think the call is Ok to evaluate, click the **👤 Evaluate** button in the **Action** column.

3. Use the evaluation form to evaluate the call:

- **Score:** Enter a score for each question. The scoring mode used for each question will be dependent on your evaluation form and business requirements.
- **Notes:** Although notes aren't mandatory, we recommend that you enter a short note to explain, describe, or clarify your score. This is very useful if you need to refer back to the evaluation at a later date, or if another QM user reviews the evaluation.
- **Control Playback:** Use the Media Player or quick controls to control feedback — see the Media Player Quick Question topic for details.

4. When you're done, click **Save & Close** to save a "draft" of the evaluation (you can come back to it later to complete the evaluation), or click **Complete** to save your "finished" version. All draft and completed evaluations are listed in the QM Performance Center.

The screenshot displays the Red Box Recorder interface. The top section shows a 'SCHEDULE' table with columns for 'Flags', 'Call Start Time', 'Call End Time', 'Call Duration', 'Extension', 'Call Direction', 'Channel Name', 'Caller Num...', 'Caller Name', 'Extension No...', 'CallSafe Tag', 'SMS Text', and 'Audio Action'. The table lists several outgoing calls from May 2016, including calls from Barbara McFet, Beth Malk, Jim Morrison, Paolo Morales, and Thomas Kriste.

Below the schedule is a 'Media Player' section with a waveform and playback controls. The bottom right section shows the 'QUALITY MANAGEMENT' evaluation form. The form includes several questions with radio button options for 'Red', 'Amber', and 'Green', and a 'Notes' field. The questions are:

- Greeting - How well did you play on message?** (Options: Red, Amber, Green; Note: good well done)
- Greeting - was the greeting correct?** (Options: Red, Amber, Green; Note: no problems)
- Wrapup - Did you end the call correctly?** (Options: Red, Amber, Green; Note: no problems)
- Politeness - Rate the call for being friendly and polite** (Options: 0, 1, 2, 3, 4, 5, N/A; Note: you were a little short with the customer)
- Polite - Did you mind your manners?** (Options: 0, 1, 2, 3, 4, 5, N/A; Note: good)
- Warmth - did you connect the customer you care?** (Options: 0, 1, 2, 3, 4, 5, N/A; Note: good)
- Overall - Rate the overall handling** (Options: Yes, No; Note: you gave the customer an incorrect answer to their question - and they will have to call back)
- Accuracy - was the information given accurate?** (Options: Yes, No; Note: you gave the customer an incorrect answer to their question - and they will have to call back)
- FCR - was the call resolved first time?** (Options: No, Yes; Note: Add Note)

 The form also includes an 'Overall Comments' section with a text area and a 'Text (0 / 2000)' counter. At the bottom, there are buttons for 'Cancel', 'Save & Close', and 'Complete'. A progress indicator shows '83% Complete'.

Manage Evaluations

Evaluations aren't the end of the QA story. You can use the QM Performance Center to review evaluations and use QM Reports to summarise evaluation data.

Review, Edit & Delete Evaluations

To review, edit or delete evaluations:



- From Quantify QM, click the **Performance Center** tab. To go to **Performance Center** from your schedule, select **Load QM** from the **...** **Menu**.
- Highlight a team or agent in the list on the left (or use the search box), and all associated evaluations are shown in the **Evaluations** panel.
 - Use the **Score** column to quickly scan evaluation scores.
 - Use the **Coaching** column to see which evaluations have coaching notes.
 - Use the **Action** column to review, edit and delete evaluations — see below.
- To review or edit an evaluation, click the **Review** icon next to the evaluation. This will take you into the evaluation form. From here you can:
 - Review the evaluation details and play the associated call using the quick control buttons at the bottom of the form. If you're just reviewing an evaluation, click the **Cancel** button when you're finished, or select **Close** from the **...** **Menu**. This will exit the evaluation form without making any changes.
 - Edit the evaluation — add/edit notes, set coaching notes, and change scores. If you change a score, you'll be prompted to enter a reason for the score change. When you're finished, click the **Complete** button to save your changes — to exit without saving changes, click the **Cancel** button.
 - Print or export the form using the **...** **Menu**.
- Lastly, if you really need to, you can delete an evaluation. We recommend you review the evaluation before you delete it, just to make sure it's the right one.

To delete an evaluation in the QM Performance Center, click the **Delete** (trash can) icon next to the evaluation you want to delete – you'll be asked to enter a reason for the deletion.

Performance Center	Form Designer	Coaching	Reports				
Evaluation Date	Evaluation Form	Evaluator	Agent	Reference	Coaching	Score	Action
11/03/2016 09:33:19	Quick Review - Support	John Demo	Thomas Kristensen	Krist/16/3/2	<input type="checkbox"/>	72%	
10/03/2016 15:17:00	Quick Review - Support	John Demo	Jim Morisson	Moris/16/3/1	<input type="checkbox"/>	58%	
10/03/2016 15:15:49	Quick Review - Support	John Demo	Paolo Morales	Moral/16/3/1	<input type="checkbox"/>	43%	
10/03/2016 15:14:00	Quick Review - Support	John Demo	Barbera McFell	Mcfel/16/3/1	<input type="checkbox"/>	83%	
09/03/2016 17:52:37	Quick Review - Support	John Demo	Bash Malik	Malik/16/3/2	<input type="checkbox"/>	48%	
09/03/2016 17:51:24	Quick Review - Support	John Demo	Thomas Kristensen	Krist/16/3/1	<input type="checkbox"/>	77%	
09/03/2016 17:48:15	Quick Review - Support	John Demo	Jim Morisson	Moris/16/2/3	<input type="checkbox"/>	75%	
09/03/2016 17:47:29	Quick Review - Support	John Demo	Paolo Morales	Moral/16/2/3	<input type="checkbox"/>	67%	
09/03/2016 17:46:29	Quick Review - Support	John Demo	Barbera McFell	Mcfel/16/2/3	<input type="checkbox"/>	55%	
09/03/2016 17:45:33	Quick Review - Support	John Demo	Bash Malik	Malik/16/2/2	<input type="checkbox"/>	65%	
07/03/2016 10:18:40	Quick Review - Support	John Demo	Bash Malik	Malik/16/4/1	<input type="checkbox"/>	75%	
07/03/2016 09:55:30	Quick Review - Support	John Demo	Jim Morisson	Moris/16/4/1	<input type="checkbox"/>	93%	
07/03/2016 09:08:03	Quick Review - Support	John Demo	Thomas Kristensen	Krist/16/4/1	<input type="checkbox"/>	97%	

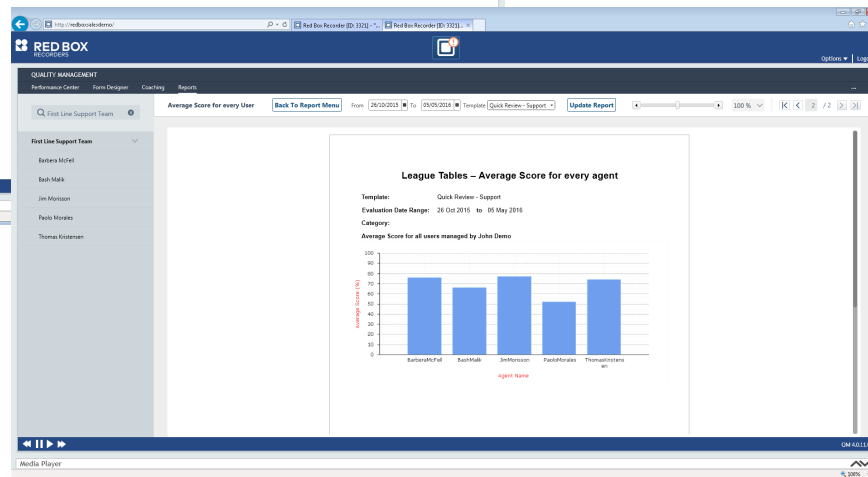
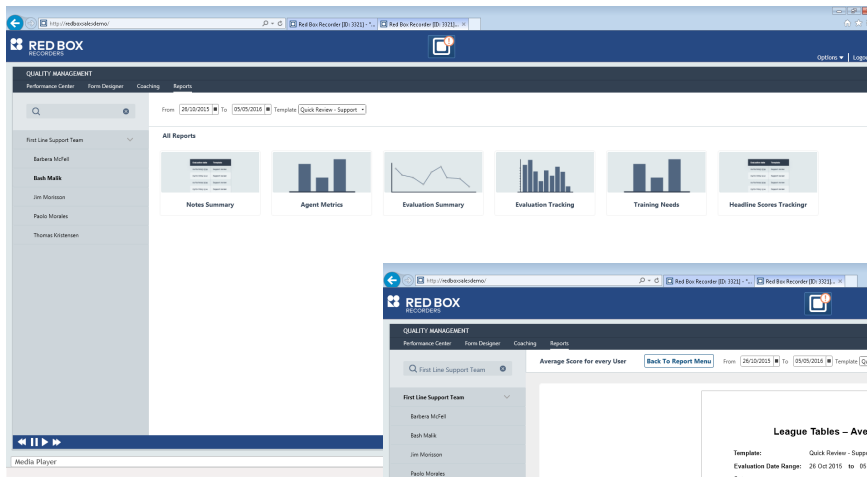
Run a Report

QM Reports help you to summarise and visualise your evaluation data for your agents, teams, and departments. This can help you spot potential issues, or in fact see a team or agent recover to good performance after a dip.

To run a report:



1. From Quantify QM, click the **Reports** tab. To go to **Reports** from your schedule, click the **...** **Menu** icon in the schedule, select **Load QM**, and then click the **Reports** tab.
2. Highlight a department, team, or agent in the list on the left (or use the search box), and the available report types are shown in the **All Reports** panel.
3. You can use the action bar to select your report date range, and if you use multiple evaluation forms you can also select which form to report on.
4. When you're happy with your selections, click a **Report Type** icon to generate the report.
5. Within the report, use the action bar to modify your date range, change the evaluation form type, or zoom and page through your report. You can also print and export your report using the **...** **Menu**.
6. When you're done, click the **Back to Reports Menu** button to return to QM Reports.



Coach an Agent

You can assign specific learning objectives to individual agents using the evaluation form, and review coaching notifications for your agents and teams in QM Coaching.

To use coaching:



1. To initiate a "coaching session" click the **Create Coaching Session** box next to a question in an evaluation form. Enter a description and click **Save** when you're done.

Depending on how you use coaching, we recommend that you try to be specific with your coaching comments and provide information on a remedial action. You can also make use of the **Notes** field for the question to provide information including attaching files and web links.

2. Once you create a coaching session, the agent will receive an email with details of the coaching comments (if an email address has been associated with the agent account). If you make use of agent licenses and allow your agents to access Quantify QM, they can also review their coaching sessions from their QM Coaching tab.
3. As a QM Manager, you can review coaching for your team, or individual agents.
 - From Quantify QM, click the **Coaching** tab. To go to **Coaching** from your schedule, click the **⋮ Menu** icon in the schedule, select **Load QM**, and then click the **Coaching** tab.
 - Just like the **Performance Center** tab, click a team, or agent to see a list of all applicable coaching sessions.
 - The **Reviewed** column shows when your agents have reviewed their coaching notification.
 - Click the **Review** icon next to a coaching session to show the details.

Assigned Date	Reviewed Date	Reference	Comments	Action
05/05/2016 09:57:18		Msk/16/5/5	let's review this call together - it wasn't great overall	
05/05/2016 09:57:04		Msk/16/5/4	remember to say thank you for calling	
05/05/2016 09:55:16		Msk/16/5/3	let's work on handling this scenario better	
05/05/2016 09:55:03		Msk/16/5/2	you must read the guidelines on answering this question - the information you provided was wrong	

QM + Search & Replay

In Search & Replay, you can use one or more of the following search criteria to find QM related calls:

Evaluated: Has the call been evaluated – Yes (1), No (0).

Evaluated By: Specify the evaluator (QM Manager).

Evaluation Score: Specify the percentage score.

Search

📁 (unsaved) 🗑️

Search Range: ⚡ 01/02/2017 00:00 to 28/02/2017 23:59

Evaluated: 123 ✕ 🗑️

Evaluated By: ABC ✕ 🗑️

Evaluation Score: 123 ✕ 🗑️

+ Add Criteria

> Start Search

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