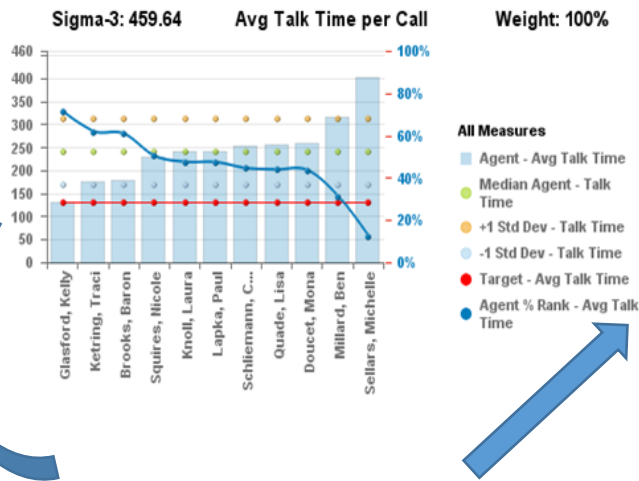




“Unify Agent Score Card”

Developed with Standard Deviation & Sigma 3 Methodology

- Typically not user friendly in UCCX sized environment and very prone to user error in manual calculations.
- SMSI’s Score Card Templates takes the complexity of designing and creating from scratch.
- Able to deliver score cards that can blend **multiple** metrics, of different dimensions (**Time, Percent & Peg Count**), along with customizable weighted values, into the **same** view to show the **true** overall agent performance.
- Optional display outputs to include/exclude agent name. Ideal for use in team and/or manager/agent 1on1



Agent Full Name	Avg Talk Time	Agent Percent Rank	Std Dev Rank
Glasford, Kelly	2:11	71.6%	1
Ketring, Traci	2:55	61.9%	1
Brooks, Baron	3:00	60.8%	1
Squires, Nicole	3:48	50.4%	2
Knoll, Laura	4:01	47.5%	2
Lapka, Paul	4:02	47.4%	2
Schliemann, Chad	4:15	44.5%	2
Quade, Lisa	4:18	43.9%	2
Doucet, Mona	4:19	43.6%	2
Millard, Ben	5:15	31.4%	3
Sellars, Michelle	6:42	12.5%	4
Avg:	3:51		
Median Agent:	4:02		
One Standard Deviation:	1:13		
Sigma-3 Ceiling Value	7:40	460 sec	
Target Value	2:11	131 sec	

In the following example, a team of Agents Average Talk Time is run through a **Standard Deviation** formula to show us that the first 3 Agents should be given a Rank of #1 because they are within 1 standard deviation of the highest “Target” performance.

The next 6 Agents are given a standard deviation rank of #2 because they are within 2 standard deviations of the “Target” performance etc.

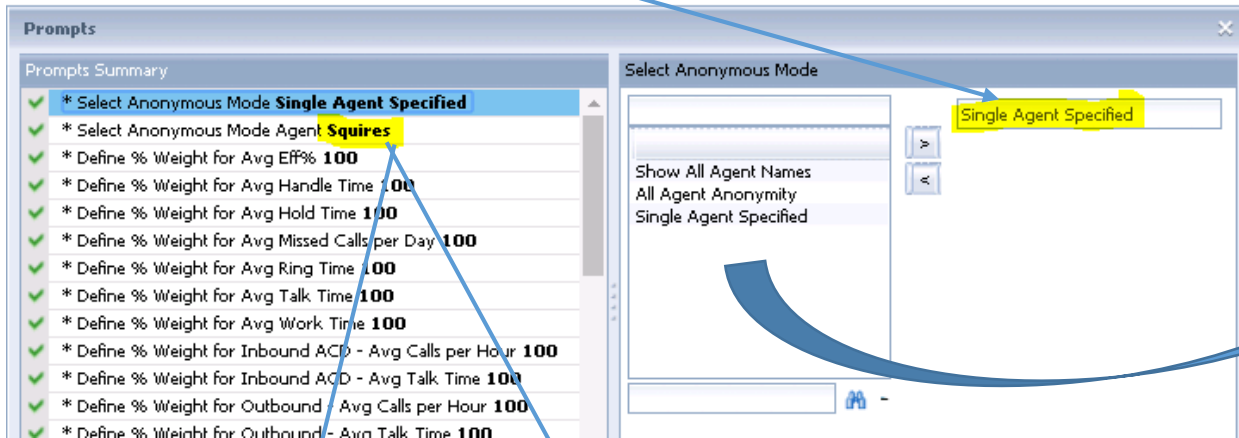
● **Target - Avg Talk Time** & **Weight: 100%** can each be defined by the user at the time the report is scheduled.

The first tab of the Agent Score Card will show a graph (horizontal or vertical) and table ranking presentation for each specific metric. In this view - **Avg Talk Time per Call** is presented.

Anonymous Mode Presentation

At the time of running the report, changing Anonymous Mode to one of several options, allows you to create graphs and tables that are able to be used in a team meeting scenario or Agent/Manager one-on-one meeting without the concern of issues that stem from the delicate process of self-evaluation.

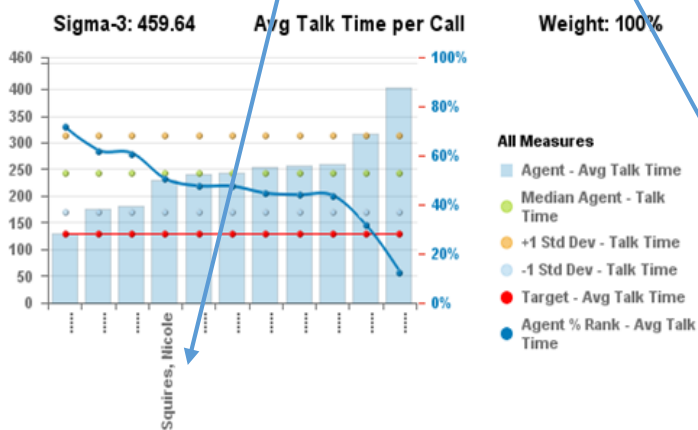
In the example below, "Single Agent Specified" was selected when running the report.



Options for Anonymous Mode

- Show All Agent Names
- All Agent Anonymous
- Single Agent Specified

The resulting report with "Single Agent Specified" - shows this metric ranking with the one Agent that was chosen – Nicole Squires.



Agent Full Name	Avg Talk Time	Agent Percent Rank	Std Dev Rank
XXXXXXXXXX	2:11	71.6%	1
XXXXXXXXXX	2:55	61.9%	1
XXXXXXXXXX	3:00	60.8%	1
Squires, Nicole	3:48	50.4%	2
XXXXXXXXXX	4:01	47.5%	2
XXXXXXXXXX	4:02	47.4%	2
XXXXXXXXXX	4:15	44.5%	2
XXXXXXXXXX	4:18	43.9%	2
XXXXXXXXXX	4:19	43.6%	2
XXXXXXXXXX	5:15	31.4%	3
XXXXXXXXXX	6:42	12.5%	4
Avg:	3:51		
Median Agent:	4:02		
One Standard Deviation:	1:13		
Sigma-3 Ceiling Value	7:40	460 sec	
Target Value	2:11	131 sec	

AGENT SCORE CARD REPORT / (cont.)

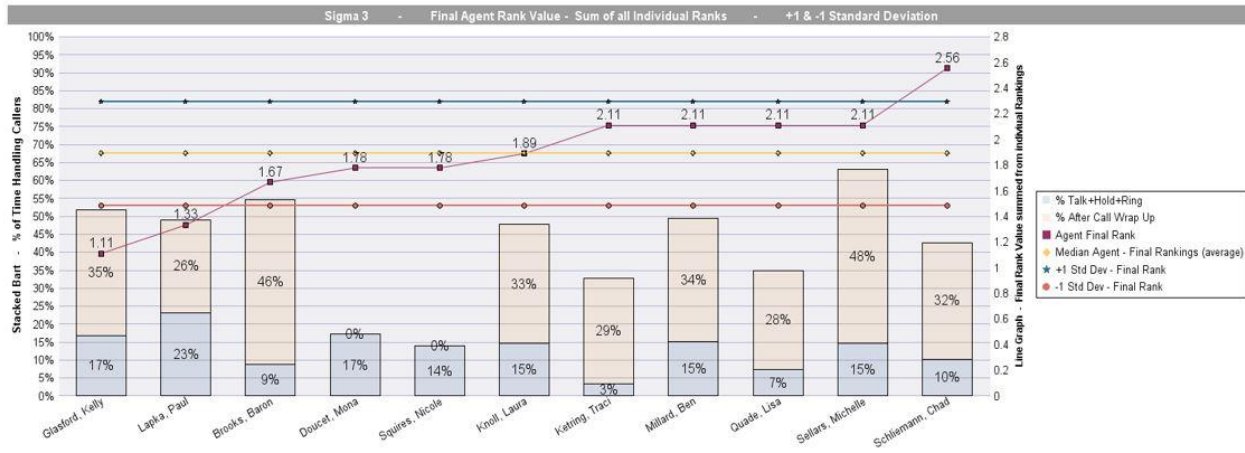
Score Card's for Employee Efficiency and Rankings

Enabled: Sigma-3 Ceiling with +1 & -1 Standard Deviation
 Week of 4/17/16 to 4/22/16

Set	Skill Name
DS_2010	2010_CSQ_DS_English
DS_2010	2010_CSQ_DS_French

The next tab will present a final **graph** and **table** taking **all** the individual **Standard Deviation** rankings from each Agent and presenting a combined final score. The score is an average of all the individual scores. The default is to give each individual score equal "weight" towards the final, combined rank value. When running the report, you can change the default value of 100% Weight on any of the metrics.

Agent Full Name	Final Weighted Rank Value	Std Dev Rank
Glasford, Kelly	1.11	1
Lapka, Paul	1.33	1
Brooks, Baron	1.67	2
Doucet, Mona	1.78	2
Squires, Nicole	1.78	2
Knoll, Laura	1.89	2
Ketting, Traoi	2.11	3
Millard, Ben	2.11	3
Quade, Lisa	2.11	3
Sellers, Michelle	2.11	3
Schliemann, Chad	2.56	4
Avg:	1.87	
Median:	1.89	
One Standard Deviation:	0.40	



Agent Full Name	Final StdDev Weighted Rankings	Weight: 100%		Weight: 100%		Weight: 100%		Weight: 100%		Weight: 100%		Weight: 100%		Weight: 100%		Weight: 100%		Agent Full Name	Final StdDev Weighted Rankings				
		Avg Ring Time per Call		Avg Handle Time per Call		Avg ACD Talk Time per Call		Avg Hold Time per Call		Avg Work Time Per Call		Avg Missed Calls per Day		% Eff-A%		Avg Calls Ansd per Hour				Avg Outbound Calls per Hour		Avg Outbound Call Time	
		Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank	Std Dev Rank	Sig-3 % Rank			Std Dev Rank	Sig-3 % Rank		
Glasford, Kelly	1.44	2	62.6%	1	84.0%	1	70.7%	1	87.1%	2	87.7%	2	69.4%	1	65.4%	1	93.2%	2	45.1%	1	82.9%	Glasford, Kelly	1.44
			0:08		7:10		2:05		0:04		4:53		0.42		65.4%		3.7		0.6		2:43		
Brooks, Baron	1.89	2	55.1%	3	49.9%	2	55.1%	1	97.4%	3	51.9%	1	100.0%	1	67.1%	3	41.1%	1	57.5%	1	86.9%	Brooks, Baron	1.89
			0:10		22:31		3:11		0:01		19:09		0.00		67.1%		1.6		0.7		2:05		
Harrison, Windy	1.89	1	74.0%	2	71.0%	3	40.6%	1	96.9%	2	78.2%	1	100.0%	1	68.4%	3	53.0%	3	20.9%	2	53.6%	Harrison, Windy	1.89
			0:06		13:01		4:12		0:01		8:42		0.00		68.4%		2.1		0.3		7:23		
Lapka, Paul	2.00	3	54.2%	2	79.4%	3	42.5%	1	90.9%	2	87.5%	1	100.0%	1	67.5%	2	70.2%	3	20.1%	2	60.2%	Lapka, Paul	2.00
			0:10		9:16		4:04		0:03		4:58		0.00		67.5%		2.8		0.3		6:20		
Squires, Nicole	2.00	1	82.3%	1	91.0%	3	46.0%	2	74.7%	1	100.0%	1	100.0%	4	15.0%	4	28.1%	1	62.7%	1	85.6%	Squires, Nicole	2.00
			0:04		4:02		3:49		0:08		0:00		0.00		15.0%		1.1		0.8		2:18		
Doucet, Mona	2.33	1	77.1%	1	89.7%	3	38.2%	2	68.6%	1	100.0%	4	22.8%	3	31.3%	4	27.4%	2	46.6%	2	68.0%	Doucet, Mona	2.33
			0:05		4:38		4:22		0:10		0:00		1.06		31.3%		1.1		0.6		5:06		

Score Card Run Time Report Parameters

There are a number of run time parameters made available to the standard Unify Score Card report. Each time a standard Score Card report is generated, a "Parameters" tab is included for reference. This tab shows you exactly which parameters were chosen when the report was run.

The parameters allow control over which metrics should or should not be used for performance calculation. Each metric can be changed from the default of 100% usage to a smaller percentage if you want the final ranking to "weight" that particular behavior with less influence on the final ranking over all activity. Chosen 0% for a metric will still generate a table and graph for the metric, but the metric will not have any impact on the final rank calculation for each Agent. There is also a choice to not include the graph or table at all in the report generated.

Select an Auto Range Filter	Last Full Week
Filter report by selected Sets?	Yes - include only selected Sets activity
Filter report by selected Skills?	No - include all activity
Filter report by selected Agents?	No - include all activity
Filter report by selected Exclude Agents?	Yes - exclude specified Agents activity
Select an Auto Range Filter	Last Full Week
Enter DateTime (Begin):	3/25/2016 12:00:00 AM
Enter DateTime (End):	3/25/2016 12:00:00 AM
Enter values for Set:	DS_2010
Enter values for Skill Name:	No Filter
Enter values for Agent Full Name:	No Filter
Enter values for Excluding Agent Full Name:	Hansen, Elizabeth;Murnane, Rob;Hlas, Blanka;Hacker, Kimberly
Enter Productive Reason Code Numbers:	None
Define Anonymous Mode	Show All Agent Names
Define Anonymous Agent	Quadetrue

This portion of the Parameters lets the user set:

- Date Range
- Departments (Sets)
- Skills
- Agent Selection

Using “Weight” parameters to improve Score Card calculation

The default is to consider all Phone Metrics equal in importance when determining a final rank for each Agent. That is not always practical for each contact center. Tracking Average Ring time behavior is an important aspect of any contact center. Ring time is something perceived by callers and thereby influences their current “disposition” when they are finally answered. As we know, caller disposition at answer time is critical to understand and manage. Agents need to understand how this impacts their overall work experience and more importantly, overall satisfaction of the particular caller.

However, in blended contact centers today, there may be a number of Agents multitasking and understandably will take longer to answer their phone when it is ringing. It may not be practical to allow Average Ring Time to be equally averaged with other metrics for final ranking. By giving Average Ring Time a lower weight, the final rank will less reflect its individual rank value. Example: If you are going to give an Agent a final rank from two different metrics equally weighted (both at 100% weight) where the first individual rank is #1 and the second is #3, the final rank would be #2 (2 is half way between 1 and 3).

Now if you weight the first metric down to 50% and leave the second metric at 100%, then final rank value would be #2.3 (higher because we are saying that the second metric’s individual rank is more important than the first metric.) The math for doing weighted averages can be accomplished in more than one way but the following is a way to do it for our example above: $\#1 * 50\% = 50$ $\#3 * 100\% = 300$ $50\% + 100\% = 150$ $50 + 300 = 350$

Define % Weight for Avg Eff%	100
Define % Weight for Avg Handle Time	100
Define % Weight for Avg Hold Time	100
Define % Weight for Avg Missed Calls per Day	100
Define % Weight for Avg Ring Time	100
Define % Weight for Avg Talk Time	100
Define % Weight for Avg Work Time	100
Define % Weight for Inbound ACD - Avg Calls per Hour	100
Define % Weight for Inbound ACD - Avg Talk Time	100
Define % Weight for Outbound - Avg Calls per Hour	100
Define % Weight for Outbound - Avg Talk Time	100

The next portion of the Parameters lets the user define the % value of each agent metric being measured. In this example all are rated 100%. Inputting a 0% will eliminate that metric from being considered.

Using “Target Value” parameters to improve Score Card calculation

Specifying the “Target Value” parameter is determined by the report user at run time of the report. You might think that the default “Target Value” is the best score of an Agent to represent the best performance for all. But this may not always be practical or even desirable for some metrics. A good example would be Average Talk Time. Short talk does not mean that the caller was satisfied with the interaction they had with our specified Agent.

In addition, if an Agent knows that shorter Talk gives them a better score, they may modify their behavior in a way that is undesirable to your contact center goals. They may even hang up on some callers to get their time down. We have metrics that will look for this type of poor behavior, but having a Target goal for Talk Time to always be the shortest “Average Talk Time” is short sighted and may contribute to less meaningful rankings.

It is best to do quality monitoring on samplings of calls where you evaluate pros and cons to the balance between Service Level defined by Time Efficiency vs Caller Satisfaction and Call Resolution.

Define Target goal for ACD Avg Calls per Hour	Use best score
Define Target goal for Avg ACD Talk Time	Use best score
Define Target goal for Avg Handle Time	Use best score
Define Target goal for Outbound Avg Calls per Hour	Use best score
Define Target goal for Avg Outbound Talk Time	Use best score
Define Target goal for Avg Ring Time	Use best score
Define Target goal for Avg Work Time	Use best score
Define Avg Calls Per Hour	Only ACD Incoming Calls
Define Eff%	Eff-A Definition



Last portion of Parameters lets the user set the Target Value – here all are set to Best Score.