5.8 Supervisors

Bright Pattern Documentation

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Omni QM for Supervisors

Omni QM is a quality management system natively built in to the Bright Pattern Contact Center omnichannel customer experience (CX) platform. Omni QM is designed to help contact centers evaluate and improve the quality of agent communications across media channels.

As a supervisor, your main goals are to direct and help your agents for the purpose of ensuring maximum performance from each team member. In order to facilitate this process, you will help by training your agents and monitoring their performance. Agent Desktop provides many tools specifically for supervisors to train and monitor agents, such as call recording, viewing various metrics, managing calendar events, enabling supervision modes (i.e., call monitoring, coaching, and barging in), and so forth.

Omni QM enhances the existing training and monitoring tools by allowing you toreview your team member's interactions, view and confirm related evaluations, bookmark important interactions, and so forth. The ability to review your agents' customer interactions will allow you to provide more specific feedback, prepare appropriate training material, and ultimately work toward producing positive customer experiences.

The following are some examples of how supervisors can use Omni QM features. Omni QM features live in Agent Desktop, section *Quality Management*, and are enabled by your contact center administrator.

Working in Omni QM

In this section of the *Omni QM Guide*, you will learn how to use Omni QM as a supervisor.

Step-by-step tutorials are available for the following topics:

- How to Search for Interactions
- How to Review Interactions and Evaluations
- Confirming Evaluations
- How to Monitor Team Performance

How to Search for Interactions

As a supervisor, in order to help and direct your agents, you will need to review their interactions. But how can you find the right interactions to review? Whether you're using the speedy search preset buttons, your contact center's own saved searches, or generating your own searches with the powerful search function, Omni QM's versatile search options help you find what you're looking for quickly and efficiently.

A supervisor’s view of Eval Home

Use Search Preset Buttons

The fastest way to search for interactions is to use the search preset buttons located in Eval Home. When selected, the search preset buttons will launch a search and display matching interactions on the search results screen.

Supervisors have access to a variety of search preset buttons, which are organized into columns. The buttons in the My Evals column display the search presets that reflect evaluations and interactions related to only you. The buttons in the Supervised column display search presets that reflect evaluations across the teams you are assigned to supervise. The buttons in the Today column contain the presets for corresponding evaluations that happened today. Finally, the buttons in the Quality Evaluator column contain the presets related to grading and saving in-progress evaluations.

Generating searches from the search present buttons is as simple as clicking the desired button. So, if speed and ease are what you require for finding interactions, the preset buttons will let you generate basic searches very quickly.

Search preset buttons

Use Saved Searches

If your quality evaluator admin has configured specific searches that are relevant to your contact center, you can find them in [Saved Searches](), located in the middle of the Eval Home screen. To generate a saved search, select an available option from the *Public searches* folder. The saved search will appear in the search function, located on the right side of Eval Home. From here, you will click the **Search** button; any matching interactions will appear on the search results screen.

Generate Your Own Searches

If you need to locate specific interactions or ones that meet certain criteria, using the search function to generate results is ideal. The search function is located on the right of the Eval Home screen as well as in the search results screen. Searches are configured with conditions and/or blocks of conditions. When you have added the conditions you want, click the **Search** button; matching interactions will appear on the search results screen.

Search results may be returned in a random order (if configured) and display important information in the search results columns, including agent name, interaction date, evaluation status, and so forth. Note that you may save any generated searches; they will appear in Saved Searches under the *My Searches* folder.

For more information, see How to Use Eval Home Search.

Using Bookmarks

After you've found the interactions you want to see, using bookmarks is a great way to save them for future reference. Bookmarks are personal to each user, so an interaction may be bookmarked by any number of users. Bookmarked interactions can be used by supervisors as reference material for training or for personal review. To bookmark an interaction, click the **bookmark** icon. Bookmarked icons are accessible through the Bookmarks search preset button located on your Eval Home screen.

A bookmarked interaction

How to Review Interactions and Evaluations

As a supervisor, you have the ability to review the interactions and evaluations of agents from the teams you supervise. Reviewing interactions lets you directly determine how your agents are performing. Reviewing evaluations, which are assessments of agent interactions performed by quality evaluators, provides you with training points to improve agent performance.

To find interactions to review, go to Eval Home and search for them using search preset buttons, saved searches, or generating your own searches. After results are displayed on the search results screen, double-click on the desired interaction; it will pop the interaction in a new tab in Eval Console.

An interaction and evaluation as seen in Eval Console

Interactions and related evaluations live together in Eval Console. The interaction is visible on the left side of the screen. If a quality evaluator filled out an evaluation form for an interaction, you will see the results on the right side of the screen under the All Evals tab.

To review the interaction, you can read transcripts, listen to voice recordings, watch screen recordings, or play through the interaction using the timeline control. The timeline control allows you to speed up or slow down the interaction on playback, or even create playback loops for reviewing specific sections of the interaction.

A playback loop

To review the evaluation, click on the All Evals tab and you will see the evaluation that was completed by your contact center's quality evaluator. Evaluations contain areas and each area contains related questions. To review the various areas and their questions, click on each area title on the top half of the evaluation; questions and how they were answered by the evaluator will be displayed on the bottom half of the evaluation.

A completed evaluation

Confirming Evaluations

In addition to being able to view interactions and evaluations, supervisors can confirm pending evaluations for members of their teams. Confirming evaluations is included in the evaluation confirmation process and allows a supervisor to either *accept* or *reject* an evaluator's assessment of an interaction. Confirmation is generally done after discussing the evaluation and the areas of improvement with the agent. This process can help keep evaluators and supervisors on the same page when it comes to standards for grading agents.

After your quality evaluators are finished evaluating your agent's interactions, you will see numbers appear in the Pending confirmations search preset button, located in the Supervised column. When you select this button, the interactions pending confirmation will appear on the search results screen. To view the evaluation, double-click on the desired interaction; it will pop the interaction in a new tab in Eval Console.

On the right side of the screen under the All Evals tab, review the evaluation by clicking on each area title on the top half of the evaluation; questions and how they were answered by the evaluator will be displayed on the bottom half of the evaluation.

When you are finished, you may click either **Accept** or **Reject** at the bottom of the evaluation. If the evaluation is accepted, it can be viewed by clicking the Accepted search preset button. If the evaluation is rejected, it can be viewed by clicking the Disputed search preset button; rejected evaluations will be redirected back to the evaluator.

Evaluations that do not meet a high enough score to be considered passing can be viewed by clicking the Failed search preset button in the Supervised column. Failed interactions can be accepted or rejected. If the failed evaluation is accepted, the evaluation stays accessible under the Failed search preset with the status marked as completed. If the failed evaluation is rejected, the evaluation is redirected back to the evaluator.

An evaluation requiring confirmation

How to Monitor Team Performance

The fastest way to monitor your team's performance is to use the *Supervised Quality Score* widget. This tool displays the average scores from selected evaluation form areas of the agents you supervise. Knowing how your team is performing overall in certain areas is helpful for knowing where you're doing well and where you need to improve.

The widget may be configured by system administrators or by individual users. If you configure your widget, you may add or remove the evaluation areas you know you need to monitor or improve performance in.

For more information, see Quality Score Widgets.

Supervised Quality Score for supervisors