

Vendors include: Calabrio, CallMiner, Cresta, evaluagent, Five9, NICE, Observe.AI, OnviSource, SESTEK, Verint, Xdroid

Figure 12.1: Analytics-Enabled Quality Management (AQM)

Calabrio	CallMiner	Cresta	evaluagent	Five9	NICE
Please describe how AQM automatically scores:					
Voice interactions					
<p>Calabrio AQM is provided by Predictive Evaluations, which uses manually scored QM evaluations and speech data and applied machine-learning algorithms to provide a predicted evaluation score for 100% of interactions. Predictive evaluation scores can be used to enhance the manual quality process by identifying contacts that might otherwise have gone unnoticed.</p>	<p>CallMiner analyzes 100% of interactions through speech-to-text transcription with automatic category tagging. Scores consist of category components, acoustic metrics, or metadata, with the ability to weight certain categories as needed. Each conversation is automatically scored for the configured agent performance metrics. Performance data is available through multiple dashboards, including CallMiner's Coach module, which feeds performance metrics for further analysis and coaching to supervisors, quality staff, and directly to agents.</p>	<p>For both voice and text interactions:</p> <ul style="list-style-type: none"> • Cresta's conversational AI models understand custom behaviors, intents, triggers, keywords, and signals (e.g., sentiment, silence in voice conversations) from every conversation and map those understood indicators to scorecards. • Scorecards can be viewed next to the conversation transcript, with automated criteria immediately populated and tied to conversational evidence. 	<p>Voice interactions are transcribed and follow the process as indicated below for text interactions.</p>	<p>Voice interactions meeting rules, defined on the AQM scoring form, are scored for each agent. Users create queries, categories, and acoustic parameters as rules on the scoring form. For instance, a user can create an "opening script compliance" section, define a query with opening scripts like "welcome, how can I help," etc., and apply it to the section. The system checks whether interactions "fit" or "don't fit" the rule. Each section is scored for every agent, and they receive a final performance score, which is the sum of all sections in the form.</p>	<p>Customers can filter or search and select voice interactions for quality evaluation based on speech categories, AI intents, agent behaviors, metadata, or an analytic category. 100% of interactions are analyzed and scored. Clients can configure KPIs (specific types of calls and applicable metrics, along with goal/desired performance levels) for certain groups of agents or supervisors. Reports allow users to see their best and worst performers for any given KPI. Automatic evaluation suggests answers to evaluation form questions and scores each question accordingly.</p>

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		<ul style="list-style-type: none"> The automated score can be overwritten as needed during the auditing process. Supervisors/ reviewers can leave comments or tag additional context to ensure scorecards are as actionable as possible. 			
Please describe how AQM automatically scores:					
Text interactions					
<p>Calabrio AQM provides Predictive Evaluations, which utilizes machine learning to predict evaluation scores across 100% of interactions based on multiple inputs that increase its accuracy over time. This is accomplished by utilizing existing evaluation form results and applying machine-learning algorithms across all interactions. Predictive evaluation scores can be used to enhance the manual quality process by identifying contacts that</p>	<p>The QA process can be applied to all channels, including voice, chat, email, etc. CallMiner applies the same category methods for AQM to text as it does speech. Users can customize categories and scores for text-based interactions or score interactions the same across all channels. Some differences are automatically considered across voice and text, e.g., with voice, acoustics are considered; for text, special characters, capitalizations, and emojis are integrated.</p>	<p>For both voice and text interactions:</p> <ul style="list-style-type: none"> Cresta’s conversational AI models understand custom behaviors, intents, triggers, keywords, and signals (e.g., sentiment, silence in voice conversations) from every conversation and map those understood indicators to scorecards. 	<p>Logic-based automated line items look for words and phrases in the conversation that suggest the element being evaluated has been passed. If the required number of keywords and phrases (queries) has been found in relation to the line item, it will automatically be set as a pass.</p> <p>For AI automated line items, the whole conversation is analyzed against the prompt and examples provided during line-item setup. Based on the scoring options, the appropriate</p>	<p>The system allows users to create forms to evaluate single-type or mixed interactions, as described above. The only difference in text-based AQM is that there is no acoustic analysis, and acoustic parameter scoring rules don’t apply. Transcriptions from Five9 digital channels are automatically transcribed. Customers who deploy CRM digital channels can implement Five9 WFO CRM Connectors to transcribe CRM digital interactions; for example, Salesforce Live Agent Chat. These</p>	<p>The same quality processes are supported for both digital and voice interactions. Analytics monitors and scores 100% of digital interactions and presents the aggregate score on a configurable KPI dashboard or report, according to the customer’s definition of metrics and sub-metrics. Automatic evaluation suggests answers (and scores) to evaluation form questions based on the presence or absence of text. Also, targeted monitoring can be performed by using</p>

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might otherwise have gone unnoticed.		<ul style="list-style-type: none"> Scorecards can be viewed next to the conversation transcript, with automated criteria immediately populated and tied to conversational evidence. The automated score can be overwritten as needed during the auditing process. Supervisors/ reviewers can leave comments or tag additional context to ensure scorecards are as actionable as possible. 	one will be selected. The reason for the score being selected is provided along with any applicable improvement actions.	transcripts can then be made available for AQM.	analytics text-based categories or text search.

Source: DMG Consulting LLC, May 2024

Figure 12.2: Analytics-Enabled Quality Management (AQM)

Observe.AI	OnviSource	SESTEK	Verint	Xdroid
Please describe how AQM automatically scores:				
Voice interactions				
AI-based moments work across multiple channels, allowing	<ul style="list-style-type: none"> AQM is used on voice interactions via the real- 	Category-based and acoustic parameter-based questions are	AQM supports fully automated and partially automated modes of	Each customer can define their own quality rating criteria or use

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<p>customers to consistently evaluate agent performance across interactions. The system understands and incorporates the properties and nuances of various communication channels, including differences in conversation style, use of emojis, acronyms, etc. to provide reliable insights.</p> <p>Customers start by defining their business objectives and creating a QA form for Auto QA. Moments can be created and leveraged to identify whether a specific question met a certain criterion, then define how each question is weighted so that it reflects accurately in the final form score. Final scores are based on the aggregated scores of the defined questions.</p>	<p>time phonetic engine, post-processing, in near-real-time text analytics after Intellecta converts the audio to text, or a combination.</p> <ul style="list-style-type: none"> • AQM is guided by Intellecta’s Analytics Templates, which define subjects (words, phrases, etc.) and scoring mechanisms. • Users create Intellecta Analytics Templates to guide the AQM through user-defined rules, invoking AI models, extracting from metadata, or a combination. • All methods can be performed in tandem. 	<p>automatically scored according to whether acoustic parameters or the transcript of the call comply with the rules created in the category. Based on the rules defined in the automated quality scoring form, the system checks all the voice interactions in the system to evaluate each agent. Users create categories, and the system provides acoustic parameters and defines these as rules to be applied in the evaluation form. For example, a user can create a category that includes opening scripts such as, “welcome, how can I help,” etc., and define this category in the “opening script compliance” section. Thus, the system checks agents’ voice interactions to tick each call as “fits” or “doesn’t fit” that rule. In the end, each section in the form is scored for each conversation, and all conversations get a final performance score based on a sum of the form’s sections.</p>	<p>operation. In fully automated mode, the system automatically processes all recorded interactions (or some of them, depending on the customer’s requirements). Every voice interaction processed for AQM is transcribed. The transcribed interaction is then processed by the AQM engine. The AQM engine first automatically identifies the correct QM form (or forms) to use for auto-scoring that interaction. Then, for each question in the QM form, it automatically determines its applicability to the specific call being auto-scored. Not-applicable questions are automatically answered as N/A. When applicable, AQM provides an answer to automated questions defined in the relevant QM form. These automated answered questions are rolled up to provide scores for sections, categories, and the entire form (call).</p> <p>Supervisors and agents can view dashboards with automated scoring results, identify issues requiring improvement, drill to the specific calls manifesting these issues, and perform the necessary coaching via the integrated coaching module.</p>	<p>the pre-defined Xdroid zero-day KPIs with weight factors. For each call, VoiceAnalytics checks whether or not it meets specific criteria through automated quality ratings. Examples of quality rating criteria are proper greeting at the beginning of the call, mandatory questions and statements used, proper closing of conversation, short periods of silence or music on hold, etc. These tasks can be performed with the automated rules created by the users or with the use of generative AI to evaluate the call automatically.</p>

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Observe.AI	OnviSource	SESTEK	Verint	Xdroid
			<p>In partially automated mode, calls are selected for manual scoring, as in traditional QM. When evaluators review a call, some questions on their form are scored automatically, while others may still be filled in manually.</p>	
<p>Please describe how AQM automatically scores:</p>				
<p>Text interactions</p>				
<p>Non-speech inputs such as messaging and email do not require the use of ASR, but once they are ingested into the platform and available to the LLM, they are analyzed the same way as speech sources. Customers can define and utilize customized moments to automatically score text interactions via QA forms.</p>	<p>Multiple formats of text-based interactions are converted to a standard format and used by text analytics. Text-based interactions, such as text messages, emails, forms, and others, are first converted to standard text files. Files related to the same customer during the same transaction but using multiple media are merged to create a single, unified interaction file. The final versions are utilized by Intellecta’s Excerpta text analytics using multiple engines, such as NLU/DM, machine learning, and deep learning (as required).</p>	<p>The system allows users to create forms to evaluate text interactions. The difference in text-based interactions is that acoustic-based questions are not available, but sentiment-based questions are.</p>	<p>AQM for text-based interactions is identical to AQM for voice interactions, except the text interactions are not transcribed. Instead, text interactions are fed directly into the AQM engine for auto scoring.</p>	<p>It evaluates text interactions with the same approach used for voice interactions. Rules should be created in consideration of text interactions (acoustics cannot be measured in text interactions, etc.). The mechanism of creating rules for text analysis is similar to creating rules for voice interactions; however, users need to select the right media filter, and some parameters will not apply (e.g., distance in seconds in the case of email).</p>

Source: DMG Consulting LLC, May 2024