



Conversational Analytics AI Migration Packet

Customer Engagement Workflow, Project
Charter, Sales & Service Scorecard

Customer Engagement Workflow >>>



Initiation

Assign Project Manager
[Duration (Days) - 1]

Pre-Discovery Meeting
(Internal)
[Duration (Days) - 1]

Discovery Meeting
[Duration (Days) - 1]

Assign Resources
[Duration (Days) - 1]

Follow-Up Meeting
(if required)
[Duration (Days) - 1]

Planning

Storyboard Creation and
Review - Internal
[Duration (Days) - 4]

Storyboard
Review - External
[Duration (Days) - 1]

Execution

Media Ingestion
[Duration (Days) - 10]

Create Category Roadmap
[Duration (Days) - 2]

Phrase Review - Calibration 1
[Duration (Days) - 15]

Initial Automation
[Duration (Days) - 7]

Phrase Review - Calibration 2
[Duration (Days) - 15]

Final Automation
[Duration (Days) - 1]

Monitoring and Control

Begin Regular Calibration
[Duration (Days) - 1]

Begin Maintenance
[Duration (Days) - 1]

Closing

Transition from
Implementation to Etech
Insights - Post-Factum
[Duration (Days) - 1]



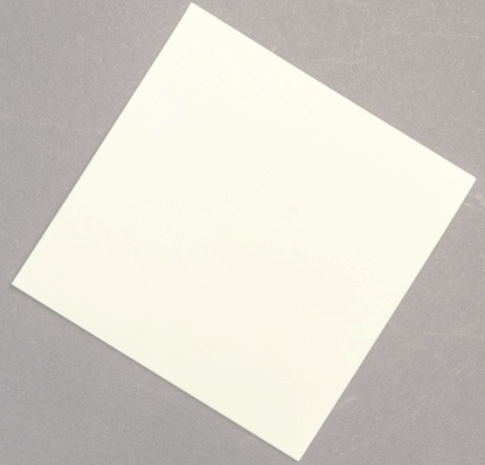
Project Charter - QA Automation

Name	Duration	Owner
Requirements Gathering and Analysis	3 days	CX Team
Conduct stakeholder interviews and workshops	1 day	CX Team
Analyze existing quality monitoring processes and metrics	1 day	CX Team
Define scope and objectives of automated quality analytics solution	1 day	CX Team
Infrastructure Set-Up and Ingestion	6 days	
Set-Up AWS Instance	1 day	Cloud Infra Team
Install Configuration	1 day	Cloud Infra Team
UAT	1 day	Integration Team
Scoping Call	0.5 day	Integration Team
Develop Ingestion Job	1 day	Integration Team
Ingest Media to AI application Test	0.5 day	Integration Team
UAT - Test Upload	0.5 day	CX Team
Ingest Media to AI application All last 3 Months	0.5 day	Integration Team

Name	Duration	Owner
Data Preparation and Integration	5 days	
Identify and collect relevant data sources	1 day	Integration Team
Implement data integration and ETL processes	2 days	Integration Team
Ensure data quality cleansing and normalization	2 days	Integration Team
Quality Monitoring Automation	11 days	
Create and Finalize an AI Scorecard	1 day	CX Team
Map Conditions to the Parameters	0.5 day	CX Team
Create scorecard on QEval	0.5 day	CX Team
Upload test sample w rec on QEval	1.5 days	CX Team
Story Board Review	0.5 day	CX Team
Category Roadmap Creation	1 day	CX Team
Train the engine on desired behaviors	7 days	Analyst Team
Quality Scoring and Evaluation	5 days	Analyst Team
AA Accuracy Analysis and OBA Other Bucket Analysis	2 days	Analyst Team
Manual Accuracy Audit and Fine Tuning	1 day	Analyst Team
Build and Deliver DataFrame	2 days	Analyst Team

Name	Duration	Owner
Reporting and Dashboards	7 days	
Design and develop dashboards and reports	2 days	Analyst Team
Incorporate visualizations and drill down capabilities	1 day	Analyst Team
Enable data exploration and ad-hoc analysis	1 day	Analyst Team
Overall Engagement Feedback	1 day	CX Team
Fine Tune DataFrame	1 day	Analyst Team
Feedback Session 2	1 day	CX Team
Fine Tune DataFrame	1 day	Analyst Team
Frame Freeze	1 day	CX Team
Agent Performance Management	3 days	
Integrate with performance management systems	1 day	CX Team
Automate score distribution and feedback loops	1 day	CX Team
Enable coaching and training recommendations	1 day	CX Team

Name	Duration	Owner
Change Management	11 days	
Stakeholders Training	1 day	CX Team
Agent Training	1 day	CX Team
QA Coach Training	1 day	CX Team
End User Feedback Sessions	1 day	CX Team
Continuous Weekly Engagement	1 day	CX Team
Establish monitoring backup and disaster recovery	2 days	Cloud Infra Team
Continuous Improvement	3 days	
Establish processes for model retraining and refinement	1 day	CX Team
Collect and incorporate user feedback - UAT	1 day	CX Team
User Acceptance Testing	2 days	CX Team
Pilot Rollout	1 day	CX Team
Phased Deployment		CX Team
Maintenance and Support	Ongoing	CX Team
Establish support structure - Daily/Weekly/Monthly Domain Experts	Ongoing	CX Team



Sales Scorecard



Sales - Scorecard: Greeting & Verification

#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus Area
Greeting & Verification				
1	<p>Did the Specialist used appropriate call opening procedure? (using script where applicable)</p> <p> <input type="checkbox"/> Didn't open the call within 4 seconds <input type="checkbox"/> Didn't thank the customer for calling <input type="checkbox"/> Didn't introduce Specialist and Company <input type="checkbox"/> None </p>	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p>	3	Improving CX Experience
2	If existing member, did the Specialist appreciate customer for their loyalty?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	2	Improving CX Experience
3	<p>Did the Specialist follow the verification process? (Zero Tolerance Parameter)</p> <p> <input type="checkbox"/> First & Last Name <input type="checkbox"/> Registered Email Address <input type="checkbox"/> Contact Number <input type="checkbox"/> Last 4 of SSN <input type="checkbox"/> None </p>	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	5	Improving CX Experience
4	Did the Specialist read recording statement? (Zero Tolerance Parameter)	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	4	Improving CX Experience

Sales - Scorecard: Customer Experience



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus Area
Customer Experience				
5	Did the Specialist provide willingness to help and use Affirmative Language throughout the call?	Gets it Getting it Needs Improvement	3	Improving CX Experience
6	Did the agent show empathy when needed and refrain for blaming the company?	Gets it Getting it Needs Improvement NA	3	Improving CX Experience
7	Did the Specialist use proper hold procedures: Ask permission, advise how long ,provide reason for the hold, thank the caller for holding? Leave the call on hold longer than three minutes, advise the caller they were being transferred?	Gets it Getting it Needs Improvement NA	5	Improving CX Experience
8	Did the Specialist minimize dead air (less than 15-20 sec), and avoid talking under their breath while navigating the system/researching?	Gets it Getting it Needs Improvement NA	4	Improving CX Experience
9	Did the Specialist actively listen and stay engaged throughout the call, without making the caller repeat information already provided?	Gets it Getting it Needs Improvement	4	Improving CX Experience
10	Did the Specialist have an upbeat, positive and inviting tone throughout the call, polite, matching the caller's pace?	Gets it Getting it Needs Improvement	3	Improving CX Experience
11	Did the Specialist take ownership of the call and display confidence, avoiding the use of ahh's and umm's?	Gets it Getting it Needs Improvement	4	Improving CX Experience
12	Did the Specialist follow correct transfer procedure?	Gets it Getting it Needs Improvement NA	3	Improving CX Experience

Sales - Scorecard: Discovery and Sales



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus Area
Discovery and Sales				
13	Did the Specialist create effective urgency?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
14	Did the Specialist ask effective probing questions to identify customer needs and special requests if any?	Gets it Getting it Needs Improvement NA	5	Increasing Ops Efficiency/Driving Revenue
15	Did the Specialist match customer needs while presenting the offer?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
16	Did the Specialist present alternate offer (if applicable)?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
17	Did the Specialist refer offer from offers Matrix and act accordingly?	Gets it Getting it Needs Improvement NA	3	Increasing Ops Efficiency/Driving Revenue
18	Did the Specialist provide complete and accurate information? (Including cancellation policy & total price of booking)	Gets it Getting it Needs Improvement NA	3	Driving Revenue
19	Did the Specialist effectively ask for sale after each offer?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
20	Did the Specialist attempt to handle each objection raised from customer's end?	Gets it Getting it Needs Improvement NA	4	Driving Revenue

Sales - Scorecard: Call Closing

#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus Area
Call Closing				
21	<p>Did the Specialist recap call details? If Needs Improvement, then please select from the below:</p> <p><input type="checkbox"/> Phonetically spelling guest name and email on Order Summary</p> <p><input type="checkbox"/> Billing Address</p> <p><input type="checkbox"/> Billing Address</p> <p><input type="checkbox"/> Confirm Customer Requirements</p> <p><input type="checkbox"/> Any other requests/concerns assisted on the call</p>	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	4	Improving CX Experience
22	Did the Specialist encode correct order details in system?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	3	Improving CX Experience
23	Did the Specialist provide confirmation number to the customer?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	3	Improving CX Experience
24	Did the Specialist inform customer about the confirmation email?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	3	Improving CX Experience
25	Did the Specialist educate customer with online prompts for Self serve options, future steps and Mobile App Installation?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	3	Improving CX Experience

Sales - Scorecard: Closing & Auto-Fail



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus Area
Call Closing				
26	Did the Specialist offer Member enrollment? (If customer wasn't a member)	Gets it Getting it Needs Improvement NA	3	Improving CX Experience/Driving Revenue
27	Did the Specialist ask for future orders before closing the call?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
28	<p>Did the Specialist follow correct closing process? Please insert comment for N/A</p> <p><input type="checkbox"/> Specialist missed to thank the caller for calling</p> <p><input type="checkbox"/> Specialist missed to use branding statement</p> <p><input type="checkbox"/> Specialist found with call manipulation and Avoidance</p> <p><input type="checkbox"/> None</p>	Gets it Getting it Needs Improvement NA	3	Improving CX Experience
29	Did the Agent Document the case and dispose the call correctly? (Zero Tolerance Parameter)	Gets it Getting it Needs Improvement NA	5	Increasing Ops Efficiency/Driving Revenue



Service Scorecard



Service - Scorecard: Greeting & Compliance

#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Greeting & Call Compliance				
1	<p>Did the Specialist used appropriate call opening procedure? (using script where applicable)</p> <p><input type="checkbox"/> Didn't open the call within 4 seconds</p> <p><input type="checkbox"/> Didn't thank the customer for calling</p> <p><input type="checkbox"/> Didn't introduce Specialist and Company</p> <p><input type="checkbox"/> None</p>	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p>	3	Improving CX
2	Did the Specialist appreciate customer's Loyalty?	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p> <p>NA</p>	2	Improving CX
3	Did the Specialist adhered to Call Compliance Procedure? (Zero Tolerance Parameter)	<p>Gets it</p> <p>Getting it</p> <p>Needs Improvement</p>	3	Improving CX

Service - Scorecard: Customer Experience

#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Customer Experience				
4	Did the Specialist understand the customer's concern and paraphrase to confirm the concern?	Gets it Getting it Needs Improvement	3	Improving CX
5	Did the agent show empathy when needed and refrain for blaming the company?	Gets it Getting it Needs Improvement NA	3	Improving CX
6	Did the Specialist provide willingness to help and use Affirmative Language throughout the call?	Gets it Getting it Needs Improvement	3	Improving CX
7	Did the Specialist follow the verification process? (Zero Tolerance Parameter)	Gets it Getting it Needs Improvement NA	5	Improving CX
	<input type="checkbox"/> First & Last Name <input type="checkbox"/> Registered Email Address <input type="checkbox"/> Contact Number <input type="checkbox"/> Last 4 of SSN <input type="checkbox"/> None			
8	Did the Specialist confirm the best call back number with the customer in case of call dropped/interruption?	Gets it Getting it Needs Improvement NA	3	Improving CX

Service - Scorecard: Customer Experience



#	SECTION NAME	Ratings	Weightage (%)	Behavior/ Focus
Customer Experience				
9	Did the Specialist use proper hold procedures: Ask permission, advise how long ,provide reason for the hold, thank the caller for holding? Leave the call on hold longer than three minutes, advise the caller they were being transferred?	Gets it Getting it Needs Improvement NA	4	Improving CX
10	Did the Specialist minimize dead air (less than 15-20 sec), and avoid talking under their breath while navigating the system/researching?	Gets it Getting it Needs Improvement NA	4	Improving CX
11	Did the Specialist actively listen and stay engaged throughout the call, without making the caller repeat information already provided?	Gets it Getting it Needs Improvement	4	Improving CX
12	Did the Specialist have an upbeat, positive and inviting tone throughout the call, polite, matching the caller's pace?	Gets it Getting it Needs Improvement	4	Improving CX
13	Did the Specialist take ownership of the call and display confidence, avoiding the use of ahh's and umm's?	Gets it Getting it Needs Improvement	5	Improving CX
14	Did the Specialist proactively update the customer (where required) and share helpful information to avoid recurrence of the issue?	Gets it Getting it Needs Improvement NA	5	Improving CX

Service - Scorecard: Policies and Procedures



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Policies and Procedures				
15	Based on the main issue or concern of the customer, did the Specialist follow the correct resolution process?	Gets it Getting it Needs Improvement NA	5	Improving CX
16	Did the agent provide any incorrect or misleading information? (Zero Tolerance Parameter)	Gets it Getting it Needs Improvement	6	Improving CX
17	If supervisor requested, did the Specialist follow proper escalation procedure? <input type="checkbox"/> Agent tried to deny the supervisor request	Gets it Getting it Needs Improvement NA	3	Improving CX
18	Did the Specialist resolve the customer's query/concern? (Zero Tolerance Parameter) <input type="checkbox"/> If Needs Improvement- Did the Specialist clearly explain next steps and set proper expectations for resolution?	Gets it Getting it Needs Improvement NA	4	Improving CX
19	Did the Specialist used the available tools efficiently to quickly address inquiries and concern?	Gets it Getting it Needs Improvement	4	Improving CX

Service - Scorecard: Upselling



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Upselling and Sales				
20	Did the Specialist make at least one attempt towards upsell?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
21	Did the Specialist check and offered any suitable/eligible promotion?	Gets it Getting it Needs Improvement NA	3	Driving Revenue
22	Did the Specialist asked for future Orders?	Gets it Getting it Needs Improvement NA	3	Driving Revenue

Service - Scorecard: Effective Closing

#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Effective Closing				
23	Did the Specialist educate customer with online prompts for Self serve options, future steps and Mobile App Installation?	Gets it Getting it Needs Improvement NA	3	Improving CX & Driving Revenue
24	Did the Specialist recap the call?	Gets it Getting it Needs Improvement NA	3	Improving CX
25	Did the Specialist offer further assistance?	Gets it Getting it Needs Improvement NA	3	Improving CX
26	Did the Specialist follow correct closing process? Please insert comment for N/A	Gets it Getting it Needs Improvement NA	3	Improving CX
	<input type="checkbox"/> Specialist missed to state follow up reply will be sent on email <input type="checkbox"/> Specialist missed to provide case number <input type="checkbox"/> Specialist missed to thank the customer for calling <input type="checkbox"/> Specialist found with call manipulation or avoidance <input type="checkbox"/> Specialist missed to use branding statement and closed the call <input type="checkbox"/> None			
27	Did the Specialist update the customer regarding the survey? (Customer Feedback)	Gets it Getting it Needs Improvement NA	3	Increasing Ops Efficiency
28	Did the Agent Document the case and dispose the call correctly? (Zero Tolerance Parameter)	Gets it Getting it Needs Improvement	3	Increasing Ops Efficiency/Driving Revenue

Service - Scorecard: Business Insights



#	SECTION NAME	Ratings	Weightage (%)	Behavior/Focus
Business Insights				
29	Reason for Contact	Dropdown Menu to select the appropriate Call Reason	Non Scoring Parameter	Increasing Ops Efficiency
	<input type="checkbox"/> Order Inquiry <input type="checkbox"/> Shipping/Order Status <input type="checkbox"/> Cancel Order <input type="checkbox"/> Modify Order <input type="checkbox"/> Website Issues <input type="checkbox"/> Didn't receive order confirmation email <input type="checkbox"/> Damaged Product received <input type="checkbox"/> Replace/Exchange Order <input type="checkbox"/> Return Order <input type="checkbox"/> Refund Request <input type="checkbox"/> Return Request			
30	Was there Customer Effort on the Call?	Dropdown Menu to select the Customer Effort Driver	Non Scoring Parameter	Increasing Ops Efficiency
	<input type="checkbox"/> Customer Frustration <input type="checkbox"/> Customer Confusion <input type="checkbox"/> Previous call disconnected <input type="checkbox"/> Didn't receive any follow up response <input type="checkbox"/> Repeat Caller <input type="checkbox"/> Long Queue hold <input type="checkbox"/> Agent Inactive Listening <input type="checkbox"/> Channel Switch <input type="checkbox"/> NA			
31	Was there Agent Effort on the call?	Dropdown Menu to select the Agent Effort Driver	Non Scoring Parameter	Increasing Ops Efficiency
	<input type="checkbox"/> Agent Displaying Limitations <input type="checkbox"/> Agent training gap <input type="checkbox"/> Background Noise <input type="checkbox"/> Agent System/Connectivity Issue <input type="checkbox"/> NA			
32	Voice Of Customer?	Dropdown Menu to select the Sentiment Driver	Non Scoring Parameter	Increasing Ops Efficiency
	<input type="checkbox"/> Positive Sentiment <input type="checkbox"/> Neutral Sentiment <input type="checkbox"/> Negative Sentiment			



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