

#### **Quality Assessment mApp**

Provides the ability to assess a call, email or chat of a service desk agent.

Status       Completed       Analyst used proper greeting       No         Analyst used proper greeting       Analyst used infied customer's name       No         Analyst used infied customer's name       Analyst used infied customer's name       No         Analyst used infied customer's location       No       No         Analyst used infied customer's location       No       No         Assessment Type       Biose       Analyst used effective questioning skills to diagnose the issue       Yee         Assessed Date/By:	Quality Assessment 9	Introduction	Subtotal: 1 / 8
Overall Score       84       No         Analyst verified customer's hone number       No         Analyst verified customer's hold procedures       No         Analyst ued effective questioning skills to diagnose the issue       Yes         Analyst add uppoer hold procedures       No         Analyst verified customer's hold procedures       No         Analyst add proper hold procedures       No         Analyst der customer's hall       Yes         Analyst der customer's skill evel       No         Analyst der onstated active listening and acknowledgement       Yes         Analyst deffered the most appropriate solution       Yes </td <td><b>C J</b></td> <td>Analyst used proper greeting</td> <td>Partial 💌</td>	<b>C J</b>	Analyst used proper greeting	Partial 💌
Overall Score 844   Assessment Type Phose   Assessment Type Phose   Assessed Date/By: select Assessed Date/By:   11/29/2016 Chewrell Admin   Analyst used effecitive questioning skills to diagnose the issue Yea   Analyst used affecitive questioning skills to diagnose the issue Yea   Analyst used effecitive questioning skills to diagnose the issue Yea   Analyst used effecitive questioning skills to diagnose the issue Yea   Analyst used effecitive questioning skills to diagnose the issue Yea   Analyst used effecitive questioning skills to diagnose the issue Yea   Analyst used closer's name Analyst used affecitive questioning skills to diagnose the issue Yea   Analyst used closer informed of actions NAA   Analyst verified customer's SNI for security purposes before doing a password reset NAA   Manlyst was professional Yea   Analyst used interrupting and acknowledgement Yea   Analyst adapted to customer's skill level Yea   Analyst adapted to customer's skill level Yea   Analyst offered the most appropriate solution Yea   Analyst offered further austomer is to easine at easie of cial Yea   Analyst offered further austomer is the was are soluted in the customer's size was resolved Yea   Analyst offered further austomer is the of cial Yea   Analyst offered further austomer is the of cial Yea   Analyst updated any new contact information for the customer Yea   Anal	Status Completed	Analyst verified customer's name	No
Overall Score 84   Assessment Type Phote   Assessed Date/By: -select Assessed Date/By:   -select Assessed Date/By: -select Assessed Date/By:   11/29/2016 Analyst used effective questioning skills to diagnose the issue   Analyst welfied dead air N/A   Analyst used proper hold procedures N/A   Analyst velfied customer's SSN for security purposes before doing a password reset N/A   Vew Date/Time Information Yee   Add hote Yee   Analyst demonstrated active listening and acknowledgement Yee   Analyst demonstrated active listening and acknowledgement Yee   Analyst demonstrated active listening or talking over customer Yee   Analyst demonstrated active listening or talking over customer Yee   Analyst ordified fifter the most appropriate solution Yee   Analyst ordified fifter assistance at end of call Yee   Analyst ordified fifter assistance at end of call Yee   Analyst ordified fifter assistance at end of call Yee   Analyst ordified fifter assistance at end of call Yee   Analyst ordified fifter assistance at end of call Yee   Analyst ordified fifter assistance at end of call Yee   Analyst updated any new contact information for the customer Yee   Analyst updated any new contact information for the customere Yee </td <td></td> <td>Analyst verified customer's phone number</td> <td>No</td>		Analyst verified customer's phone number	No
Overrall Score 44   Assessment Type   Assessment Type Ethons   Analyst used effective questioning skills to diagnose the issue   Assessed Date/By: -:sdeed Assessed Date/By:   11/29/2016 Analyst used used numer's name   Analyst Bruce Bobetson   Analyst wei/ded dead air Yes   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied customer's SSN for security purposes before doing a password reet N/A   Analyst vei/fied fuenorstrated active listening and acknowledgement Yes   Analyst adapted to customer's skill level Yes   Analyst offered the most appropriate solution Yes   Analyst offered the most appropriate solution Yes   Analyst offered further assistance at end of call Yes   Analyst treffied further assistance at end of call Yes   Analyst turp vovided customer with ticket number Yes   Analyst turp vovided customer with ticket number <		Analyst verified customer's location	No
Assessment Type Phone   Assessed Date/By:	Overall Score 84	Analyst verified if there was an existing ticket number	N/A 💌
Assessed Date/By:select Asseed Date/Zy:		Transaction Information	Subtotal: 8 / 8
Arsessed Date/By: 2select Assessed Date/By: Analyst used proper hold procedures Analyst verified customer's SSN for security purposes before doing a password reset ArA Analyst verified customer's SSN for security purposes before doing a password reset ArA Analyst verified customer's SSN for security purposes before doing a password reset ArA Analyst verified to customer's SSN for security purposes before doing a password reset ArA Analyst verified to customer's SSN for security purposes before doing a password reset ArA Analyst verified to customer's SSN for security purposes before doing a password reset ArA Analyst verified to customer's skill level Analyst was professional Analyst was professional Analyst was professional Analyst adapted to customer's skill level Analyst adapted to customer's skill level Analyst avoided interupting or talking over customer Yes Analyst verified the customer's issue was resolved Analyst verified the customer is use was resolved Analyst thanked the customer for their time Yes Analyst thanked the customer for their time Yes Analyst updated any new contact information for the customer Yes Analyst updated any new contact information for the customer Yes Analyst updated any new contact information for the customer Yes Analyst updated any new contact information for the customer Yes Arabyst updated any new contact information for the customer Yes Arabyst updated any new contact info	Assessment Type Phone	Analyst used effecitve questioning skills to diagnose the issue	Yes
Analyst used proper hold procedures N/A I1/29/2016 Cherweil Admin Analyst Bruce Robertson Ticket Number 101331 ■ ■ Want To: Wey Date/Time Information Attach Recording Add Note Attach Recording Add Note Analyst verified customer's SSIN for security purposes before doing a password reset N/A Analyst verified customer's SSIN for security purposes before doing a password reset N/A Analyst verified customer's SSIN for security purposes before doing a password reset N/A Analyst verified customer's SSIN for security purposes before doing a password reset N/A Analyst was professional Analyst was professional Analyst was professional Analyst demonstrated active listening and acknowledgement Analyst demonstrated active listening and acknowledgement Analyst adapted to customer's skill level Analyst adapted to customer's skill level Analyst adapted to customer's skill level Analyst avoided interupting or talking over customer Resolution Analyst verified the customer's issue was resolved Analyst verified the customer for their time Yes Analyst thanked the customer for their time Yes Analyst thanked the customer for their time Yes Analyst updated any new contact information for the customer Yes New Journal - Note New Meecord 1 of 3 New Yes Passan Yes Yew -	Accessed Date/Rv· - select Assesed Date/Bv -	Analyst used customer's name	Yes 💌
Analyst wordled dead air ites   Analyst keydded dead air Yea   Analyst keydded dead air Yea   Analyst keydded dead air Yea   Analyst werfied customer's SSN for security purposes before doing a password rest N/A   Yant To: Soft Skills   Analyst was courteous Yea   Analyst was courteous Yea   Analyst demonstrated active listening and acknowledgement Yea   Analyst communicated clearly Yea   Analyst avoided dead air Yea   Analyst offered the most appropriate solution Yea   Analyst verified customer's issue was resolved Yea   Analyst verified the customer's issue was resolved Yea   Analyst offered the customer with ticket number Ne   Analyst the customer with ticket number Ne   Analyst the customer of their time Yea   Analyst the dated any were contact information for the customer Yea   Analyst updated any new contact information for the customer Yea   Analyst updated any new contact information for the customer Yea   Yea Yea Yea		Analyst used proper hold procedures	N/A 💌
Analyst Bruce Robertson Ticket Number 101331 Analyst verified customer informed of actions Analyst verified customer's SSN for security purposes before doing a password reset N/A To: Want To: Analyst was courteous Analyst was professional Analyst was professional Analyst was professional Analyst demonstrated active listening and acknowledgement Yea Analyst adapted to customer's skill level Analyst adapted to customer's skill level Analyst avoided interupting or talking over customer Yea Analyst verified the most appropriate solution Yea Analyst verified the customer's issue was resolved Analyst verified the customer with ticket number Analyst verified further assistance at end of call Analyst thanked the customer for their time Ticket Documentation Analyst updated any new contact information for the customer Yea New Journal- Note Yea New Journal- Note Yea Yea Yea Yea Yea Yea Yea Yea Yea Ye		Analyst avoided dead air	Yes 💌
Ticket Number 101331   Want To:   View Date/Time Information   Attach Recording   Add Note   Analyst was professional Analyst demonstrated active listening and acknowledgement Analyst demonstrated clearly Analyst adapted to customer's skill level Analyst adapted to customer's issue was resolved Analyst verified the most appropriate solution Analyst verified the customer's issue was resolved Analyst tranked the customer for their time Ticket Documentation Analyst updated any new contact information for the customer Yes New Journal-Note X Mew Journal-Note X		Analyst kept customer informed of actions	Yes
I Want To: Analyst was courteous Yes   View Date/Time Information Analyst was professional Yes   Analyst demonstrated active listening and acknowledgement Yes   Analyst demonstrated active listening and acknowledgement Yes   Analyst adapted to customer's skill level Yes   Analyst adapted to customer's skill level Yes   Analyst avoided interupting or talking over customer Yes   Analyst ovided interupting or talking over customer Yes   Analyst ovided interupting or talking over customer Yes   Analyst ovided customer's issue was resolved Yes   Analyst offered the most appropriate solution Yes   Analyst offered further assistance at end of call Yes   Analyst tanked the customer for their time Yes   Ticket Documentation Yes   Analyst updated any new contact information for the customer Yes   Analyst updated any new contact information for the customer Yes	Analyst Bruce Robertson	Analyst verified customer's SSN for security purposes before doing a password reset	N/A
View Date/Time Information   Attach Recording   Add Note   Analyst demonstrated active listening and acknowledgement Analyst demonstrated clearly Analyst adapted to customer's skill level Analyst avoided interupting or talking over customer Yes Resolution Subtotal: 8 / 1 Analyst offered the most appropriate solution Analyst verified the customer's issue was resolved Analyst verified the customer's issue was resolved Analyst verified the customer for their time Yes Analyst thanked the customer for their time Yes Journals You Takket Yes Tokket Yes Tokket Yes	Ticket Number 101331 🔍 💽	Soft Skills	Subtotal: 14 / 14
fiew Date/Time Information   kttach Recording   Analyst demonstrated active listening and acknowledgement   Analyst domonstrated active listening and acknowledgement   Analyst communicated clearly   Analyst adapted to customer's skill level   Analyst adapted to customer's skill level   Analyst avoided interupting or talking over customer   Resolution   Subtotal: 8 / 1   Analyst offered the most appropriate solution   Analyst offered the most appropriate solution   Yes   Analyst offered further assistance at end of call   Analyst offered further assistance at end of call   Analyst thack due customer for their time   Ticket Documentation   Yes   Analyst updated any new contact information for the customer   Yes	Want To:	Analyst was courteous	Yes 💌
Analyst demonstrated active listening and acknowledgement Yes   Analyst adapted to customer's skill level Yes   Analyst adapted to customer's skill level Yes   Analyst adapted to customer's skill level Yes   Analyst avoided interupting or talking over customer Yes   Analyst offered the most appropriate solution Yes   Analyst offered the most appropriate solution Yes   Analyst offered the ustomer's issue was resolved Yes   Analyst offered further assistance at end of call Yes   Analyst offered further assistance at end of call Yes   Analyst thanked the customer for their time Yes   Ticket Documentation Yes   Analyst updated any new contact information for the customer Yes   Yes Yes	/iew Date/Time Information	Yes	
Analyst communicated clearly Analyst communicated clearly Analyst adapted to customer's skill level Analyst adapted to customer's skill level Analyst analyst adapted to customer's skill level Analyst analyst analyst analyst analyst analyst analyst avoided interupting or talking over customer Resolution Yes Analyst offered the most appropriate solution Analyst offered the most appropriate solution Analyst offered the most appropriate solution Analyst verified the customer's issue was resolved Analyst provided customer with ticket number Analyst offered further assistance at end of call Yes Analyst thanked the customer for their time Yes Ticket Documentation Yes		Analyst demonstrated active listening and acknowledgement	Yes
Analyst maintained control of the call Analyst maintained control of the call Analyst avoided interupting or talking over customer Resolution Analyst offered the most appropriate solution Analyst offered the most appropriate solution Analyst verified the customer's issue was resolved Analyst provided customer with ticket number Analyst provided customer with ticket number Analyst offered further assistance at end of call Analyst thanked the customer for their time Yes Ticket Documentation Subtotal: 16 / Analyst updated any new contact information for the customer Yes Journal - Note X         Record 1 of 3	-	Analyst communicated clearly	Yes
Analyst avoided interupting or talking over customer Yes          Analyst avoided interupting or talking over customer       Yes         Resolution       Subtotal: 8 / 1         Analyst offered the most appropriate solution       Yes         Analyst verified the customer's issue was resolved       Yes         Analyst offered further assistance at end of call       Yes         Analyst offered further assistance at end of call       Yes         Analyst thanked the customer for their time       Yes         Ticket Documentation       Subtotal: 16 /         Analyst updated any new contact information for the customer       Yes         Journal - Note X       Yes		Analyst adapted to customer's skill level	Yes
Resolution Subtotal: 8 / 1   Analyst offered the most appropriate solution Yes   Analyst verified the customer's issue was resolved Yes   Analyst provided customer with ticket number No   Analyst offered further assistance at end of call Yes   Analyst thanked the customer for their time Yes   Ticket Documentation Subtotal: 16 /   Analyst updated any new contact information for the customer Yes		Analyst maintained control of the call	Yes
Analyst offered the most appropriate solution          Analyst offered the most appropriate solution       Yes         Analyst verified the customer's issue was resolved       Yes         Analyst provided customer with ticket number       No         Analyst offered further assistance at end of call       Yes         Analyst thanked the customer for their time       Yes         Ticket Documentation       Subtotal: 16 /         Analyst updated any new contact information for the customer       Yes         Journals       Yes         No       Yes         No       Yes         Yes       Yes         Yes       Yes		Analyst avoided interupting or talking over customer	Yes 💌
Analyst verified the customer's issue was resolved Analyst verified the customer's issue was resolved Analyst provided customer with ticket number Analyst offered further assistance at end of call Analyst offered further assistance at end of call Analyst thanked the customer for their time Yes Ticket Documentation Subtotal: 16 / Analyst updated any new contact information for the customer Yes		Resolution	Subtotal: 8 / 10
Analyst reinied uit contents i bate two resoluted Analyst provided customer with ticket number Analyst provided customer with ticket number Analyst offered further assistance at end of call Analyst thanked the customer for their time Yes Ticket Documentation Analyst updated any new contact information for the customer Yes Journals Ticket No Yes Journals Note X   M		Analyst offered the most appropriate solution	Yes 💌
Analyst offered further assistance at end of call Analyst offered further assistance at end of call Analyst thanked the customer for their time Ticket Documentation Subtotal: 16 / Analyst updated any new contact information for the customer Yes Journals Ticket New Journal-Note X   M		Analyst verified the customer's issue was resolved	Yes 💌
Analyst thanked the customer for their time Yes Ticket Documentation Analyst updated any new contact information for the customer Yes Journals Ticket X I K K Record 1 of 3  X I K K Record 1 of 3  X I K K K K K K K K K K K K K K K K K K		Analyst provided customer with ticket number	No
Ticket Documentation       Subtotal: 16 /         Analyst updated any new contact information for the customer       Yes         Journals       Ticket           Wasyn updated any new contact information for the customer       Yes		Analyst offered further assistance at end of call	Yes
Analyst updated any new contact information for the customer Yes       Journals     Ticket       New Journal - Note     X       Image: Second 1 of 3     Y       Image: Second 1 of 3     Y		Analyst thanked the customer for their time	Yes 💌
Image: Capacity Relation and Capacity Relationships of the Capac		Ticket Documentation	Subtotal: 16 / 16
😻 New Journal - Note 🗙   🚧 🐗 Record 1 of 3 🕨 🍽   🝸 👻   🗞 E-mail 👻 🖶 View 👻		Analyst updated any new contact information for the customer	Yes 💌
Type Created - By Datails			
Journal - History 11/29/2016 11:05 AM Cherwell Admin The following changes were made to the Quality Assessment 9 by CSDAdmin on 11/29/2016:>	Type Created V By	Details	

Quality Assessment Tuesday, November 29, 2016	Filter by Assessment Date		Presented by:					
Assessments 3	Overall Avg Score	Introduction Avg Score	Transaction Avg Score	Soft Skills Avg Score	Resolution Avg Score	Documentation Avg Score		
See Additional Dashboards	87	72.33	72.33	95.33	91.67	95.67		
	Quality Assessments by Status							
	35-							
	2.5- ម្ម							
	ອງ 2- ອງ 1.5-							
	* 1-							
	0.5-							
	0h Completed							
	Overall Average Score by Analyst							
	100- 90- 87							
	80- 70-							
	60- 50-							
	40- 30-							
	20- 10-							
	0-1		Che	rwell Admin				

### **New Objects/Dashboard**

- Quality Assessment (major)
- Quality Assessment Answer (lookup)
- Quality Assessment Type (lookup)
- Quality Assessment Dashboard

### **Modified Objects**

• Incident (additional relationship)

# Requirements

Cherwell version 5 or later.

# Setup Tasks

Configure security groups appropriately based on needs for View, Add, and Edit.