Observe.AI User Guide

Overview

Observe.AI provides a Cloud Voice AI platform for call centers which uses deep learning and natural language processing (NLP) to enhance and automate Voice of the Customer, Compliance Verification, Keyword Spotting, Sentiment Analysis, and QA.
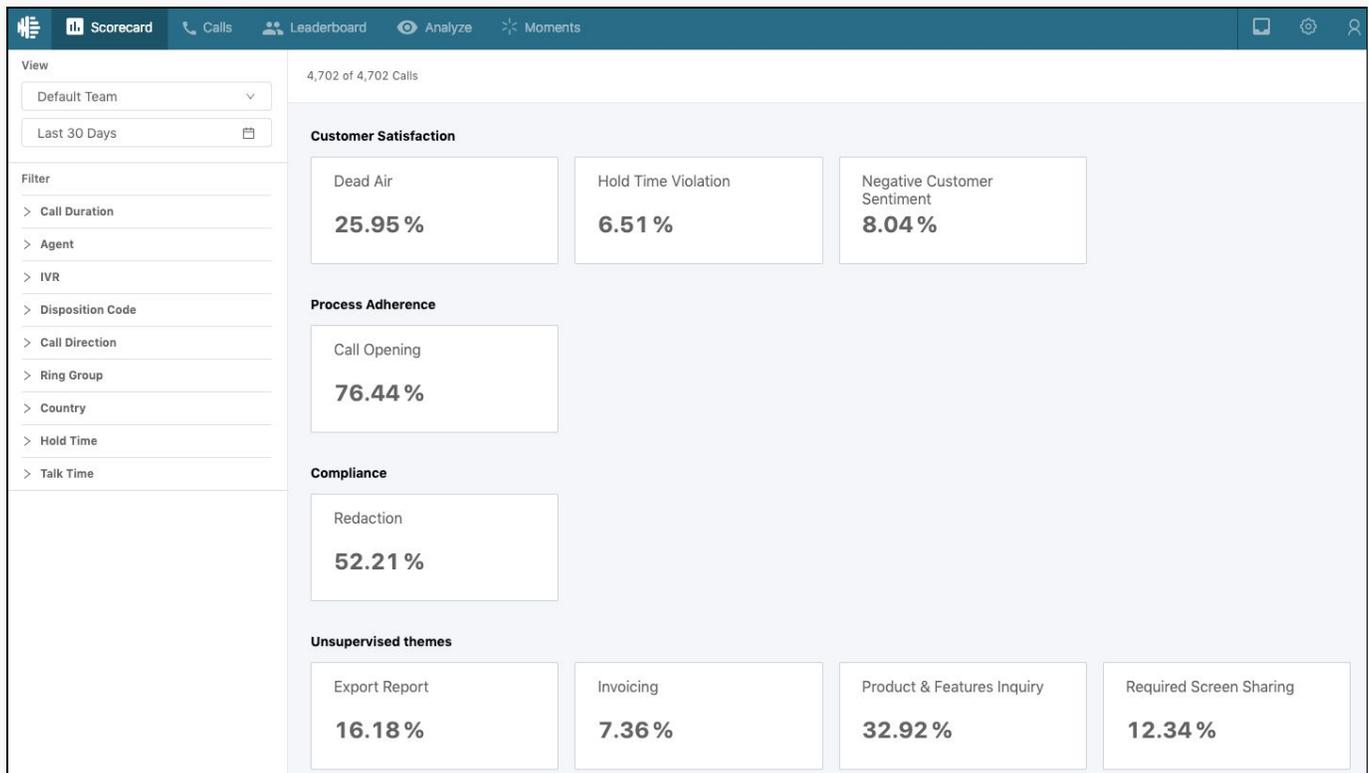

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Scorecard

The Scorecard tab provides an executive summary showing various moments configured within Observe.AI.

Filters on the left will allow for a more granular view
- **Call Duration:** View metrics only for calls lasting a specific duration
- **Agent:** View metrics only for selected Agents
- **IVR:** DTMF inputs provided by caller in IVR
- **Disposition Code:** Disposition code entered by Agent on call

Filters on the top right carry across to other tab views
- **Date Filter:** View preset or custom date range (default is 30 days)
- **Team Filter:** View metrics for all or specific teams

Calls

The Calls tab is a repository of all calls in the system. Quickly understand which calls are best or worst across various metrics.

Sorting: Click the header of any column to sort the list either ascending or descending

Filters: On the left, click one or multiple moment checkboxes to display only calls with those specific moments present.
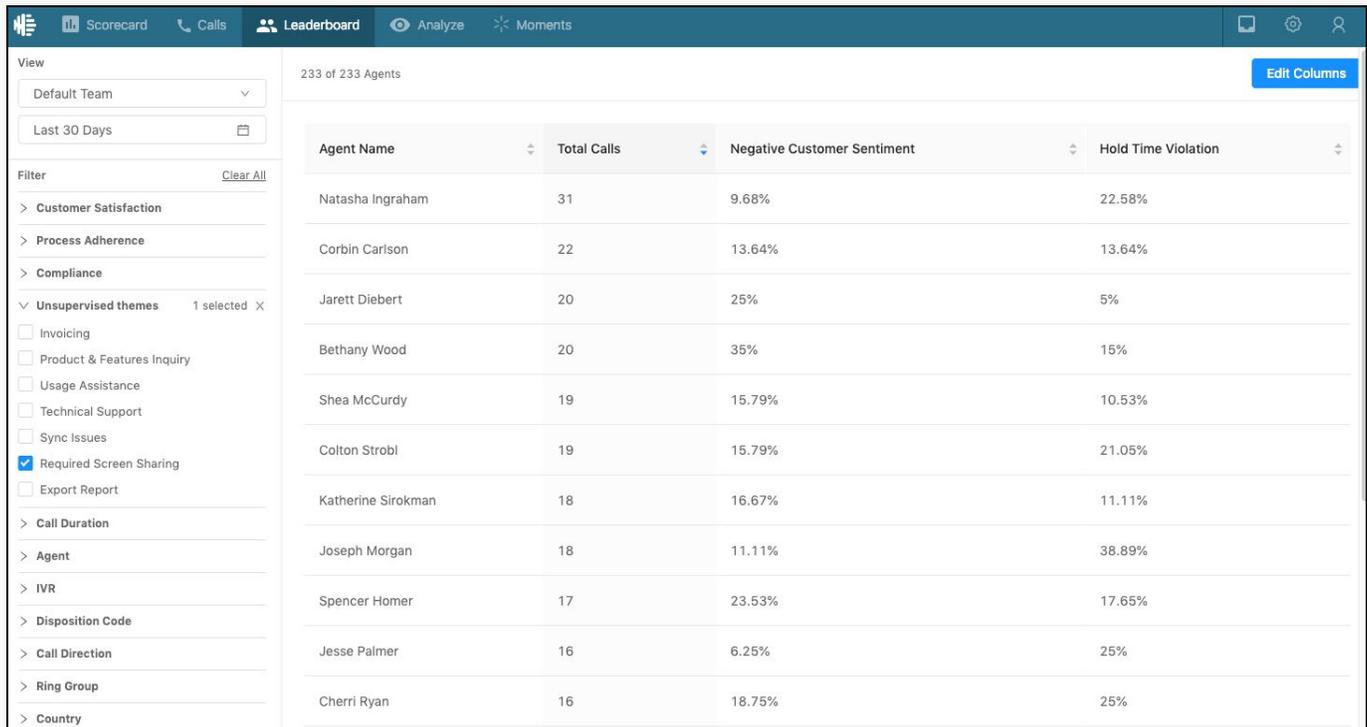
- For example, the current screenshot shows calls which include the Theme of 'Required Screen Sharing', of which 580 calls are present.

Moments: Moments show instances of when specific parameters are met. Hover over moments to see which parameters were found on each call.

Actions: Click 'View' for call details

Leaderboard

The Leaderboard tab is used to compare metrics across agents. Quickly understand which agents are top performers or bottom performers across various metrics.

Sorting: Click the header of any column to sort the list either ascending or descending. *ie, sort by which agent had the highest occurrence of Supervisor Escalations*

**Columns:** On the top right, click "Edit Columns" to choose which metrics are displayed.

- For example, the current screenshot shows the metrics 'Negative Customer Sentiment', and 'Hold Time Violation'

Filters: On the left, click one or multiple moment checkboxes to display only calls with those specific moments present

- For example, the current screenshot shows calls which include the Theme of 'Required Screen Sharing'

Analyze

The Analyze tab allows users to find calls based on specific words or phrases. This is powerful Smart Search allows for finding specific items in calls.
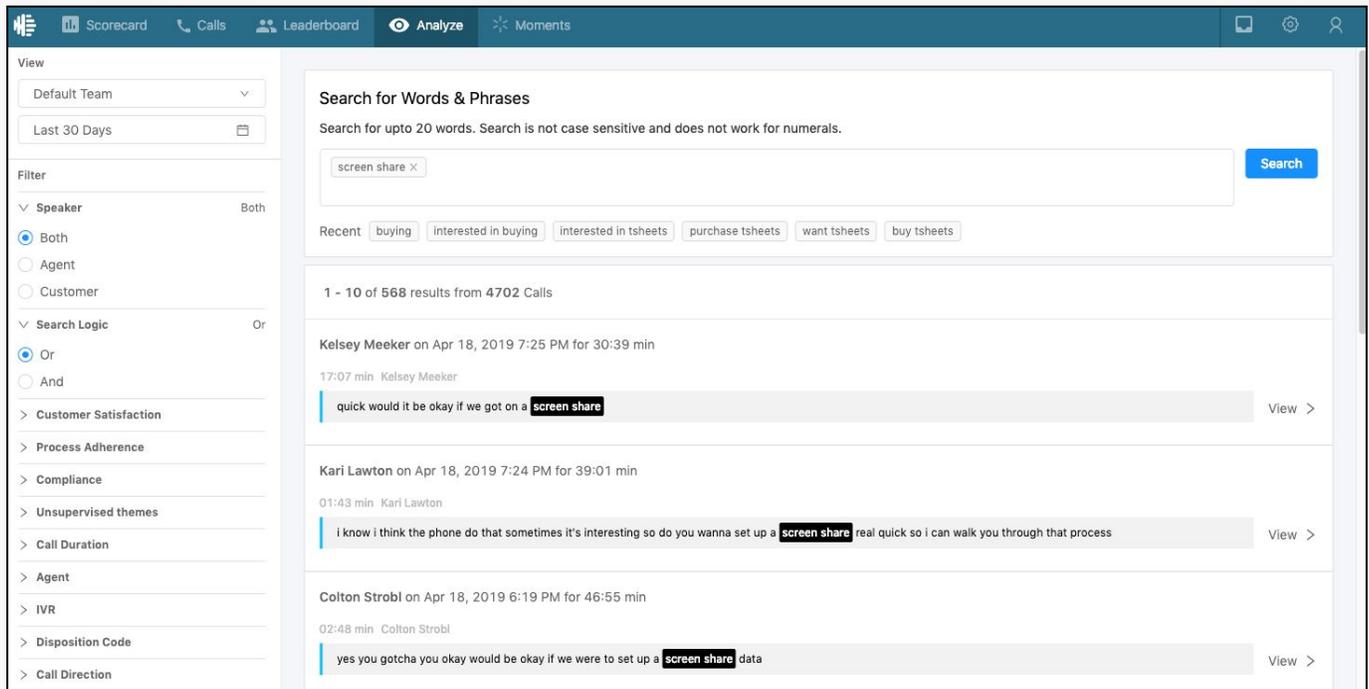
Filter by
- **Speaker:** Customer, Agent, or Both
- **Search Logic:** 'And' for calls containing all searched words or 'Or' for calls containing any of the searched words
- Along with all other standard Filters

Note: The 'Search for Words & Phrases' tool utilizes smart search - this feature returns results based on all forms of the same word. For example, searching for the word "run" will return results of 'run', 'running', and 'ran'.

Click **'View'** to
- Listen to entire call recording or just the specific audio snippet
- Leave a comment for the Agent
    - Note: To enable email notifications to Agents of comments, please contact your Observe.AI Customer Success Manager
- Report the snippet for escalation

Call Details

The Call Details view allows users to quickly see all the important moments of a call, gain more insights, while reducing QA time.
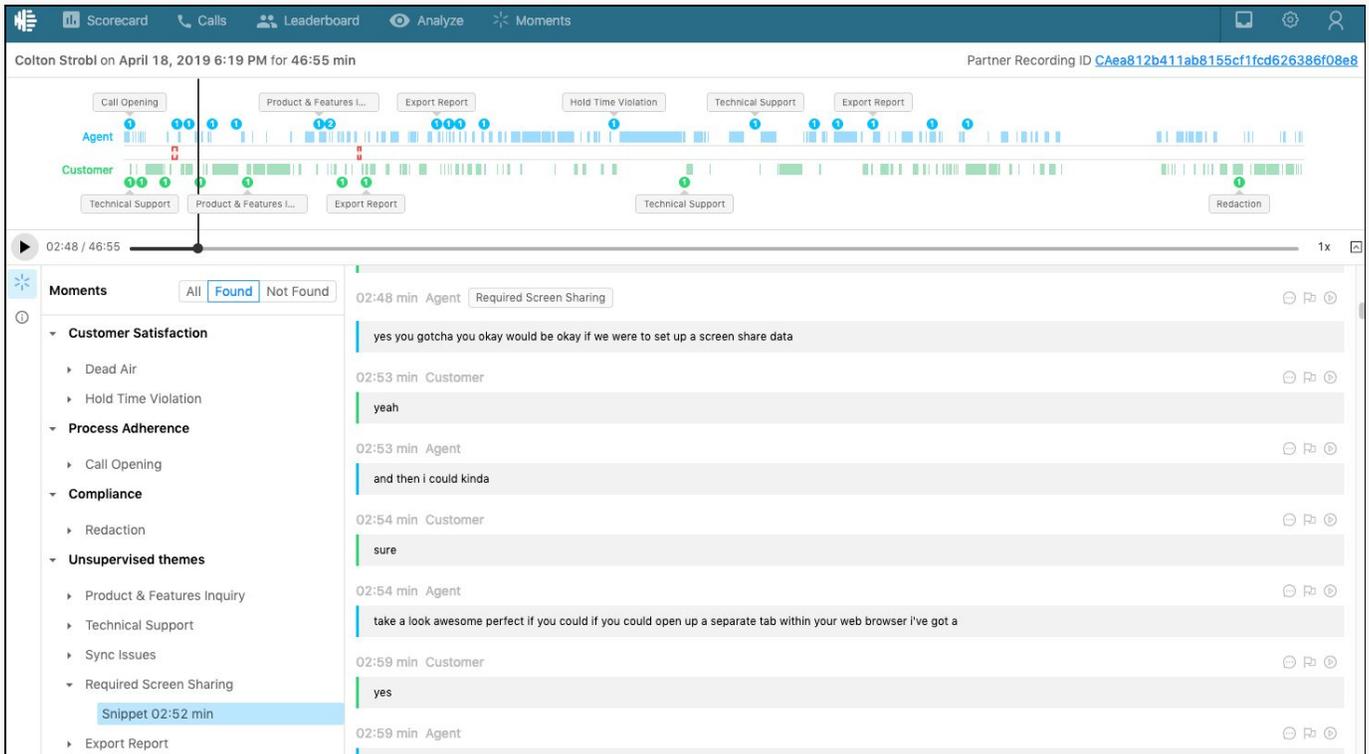
In the above call detail view

- **Moments:** Moments show instances of when specific parameters are met. The view shows which parameters were 'Found' or were 'Not Found' in the specific call. Found Moments will also show in the call transcript.
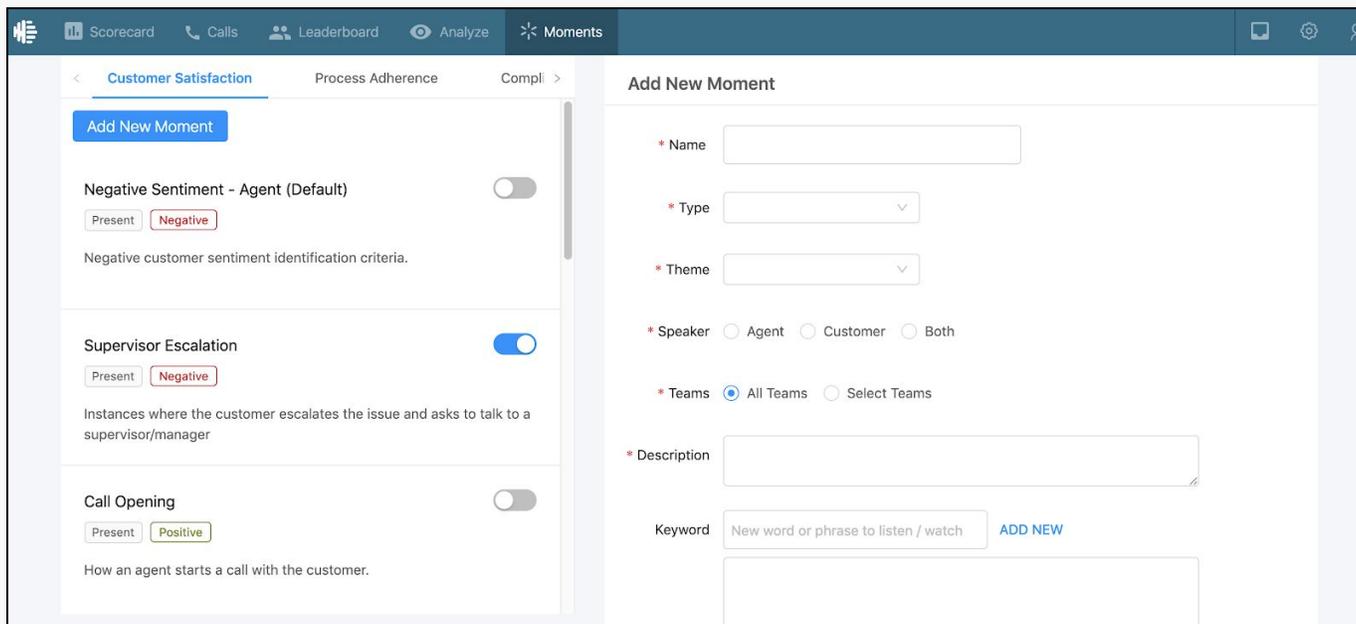- **Comments:** Any comment left will display in the specific Agent's **Inbox**
- **Playback volume & speed:** Control playback volume and speed (1x, 1.5x, 2x)

Moments

The Moments tab is used to manage moments configured within Observe.AI. These moments show on the Scorecard view, and become columns and filters by which calls can be further analyzed.

Existing moments can be viewed on the left, and can be toggled 'Active' or 'Off'. Note, only moments toggled to the 'Active' (blue) position will be discovered within calls.

Moments fall under default categories of 'Compliance', 'Customer Satisfaction', and 'Process Adherence'.

To **create a new 'Moment'**:
1. Select the **'Header'** category under which to configure the new Moment
2. Click **'Add New Moment'** on the top left side of the page
3. On the right side, Configure the
   a. **Name:** Moment name to display
   b. **Type:** Whether these keywords should be 'Present' or 'Not Present' from the call

c. **Theme:** Whether this is a 'Positive', 'Negative', or 'Neutral' moment
d. **Speaker:** Who speaks these keywords, Agent or Customer
e. **Teams:** Allows Moments to be assigned to a specific team
f. **Description:** Description of this Moment - what is the moment capturing or measuring
g. **Keyword:** Word(s) or Phrase(s) which when spoken meet this Moment criteria

4. Click **'Create'**
5. The new Moment now displays on the left under its associated header. Now toggle to 'Active' (blue) to begin capturing these Moments from calls.

Note: Newly created or edited Moments are captured on calls going forward, but not retroactively. ie: a Moment created today will be captured on a call tomorrow, but will not be captured on a call from yesterday.
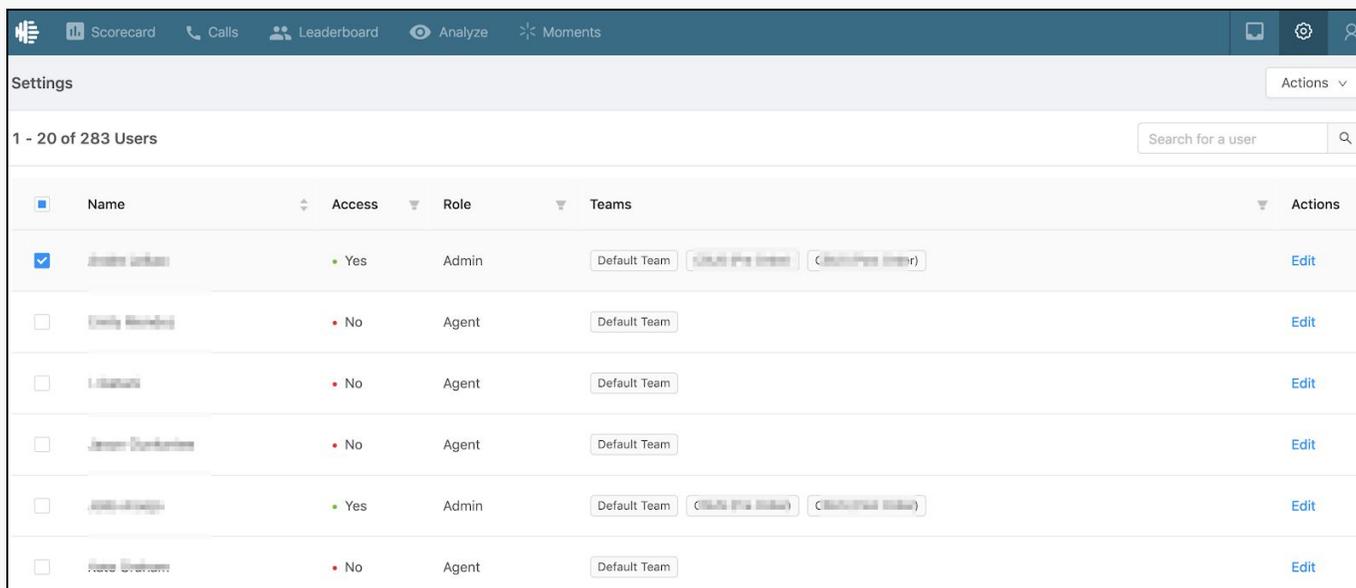
Inbox

Inbox (folder icon in the top right of screen) allows users to view any received comments. Clicking 'View' takes a user to the specific moment of the associated call where a comment was left.

Inbox functionality allows for fast, pinpointed feedback to agents allowing for faster learning improvement.

Settings

Settings (gear icon in the top right of screen) allows administrators to manage the Observe.AI access, role level, and teams of any user.
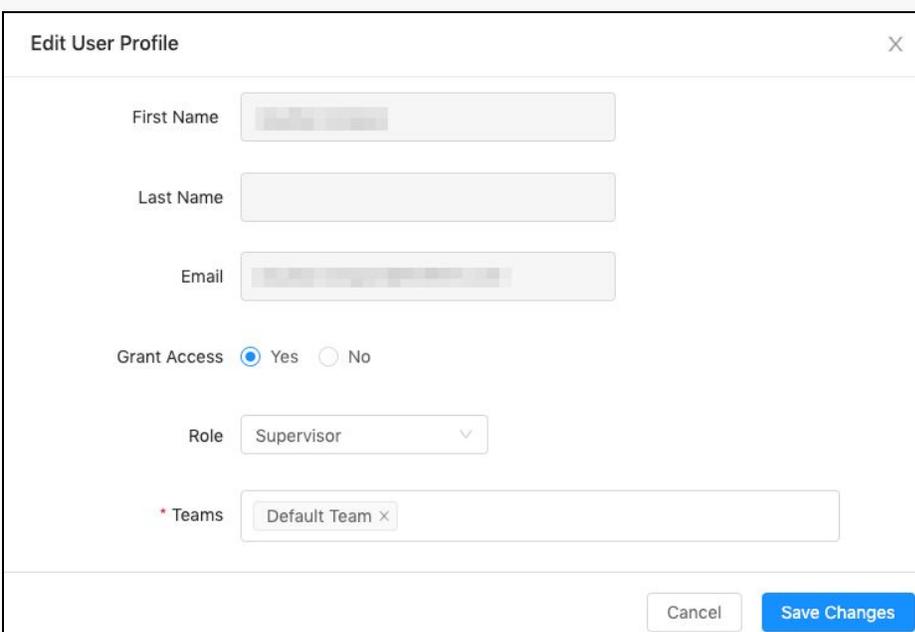

Filters: Click on the filter icon in the header row to narrow down your list of users
Order: Reorder rows by clicking on the header row name

To edit Teams associated to a user, click 'Edit' under 'Actions' next to the user.

Click the 'Teams' box, or begin typing a Team name for the selection to appear.

User Roles

Observe.AI utilizes three standard User Roles - Admin, Supervisor, Agent.

Custom roles may also be created based on fine grained permissions.

Permission	Admin	Supervisor	Agent
Scorecard View	All Calls	Calls for associated Teams	Calls taken by that Agent
Calls View	All Calls	Calls for associated Teams	Calls taken by that Agent
Leaderboard View	All Calls	Calls for associated Teams	Calls taken by that Agent
Analyze View	All Calls	Calls for associated Teams	Calls taken by that Agent
Moments Configuration	Yes	No	No
Settings Configuration	Yes	No	No
Inbox	Inbox for that User	Inbox for that User	Inbox for that User

Supervisor
- Supervisor permissions are based on the team with which they are associated.

Teams
- 'Teams' is a powerful grouping tool within Observe.AI, allowing for the grouping of users or types of calls based on any metadata. Examples of 'Teams' are
  - 'Sales Team A' - comprised of a set list of agents
  - 'Calls Type A' - comprised of all calls meeting certain metadata, for example, outbound calls from a certain ring group or skill.
- To create 'Teams', reach out to your Observe.AI customer success manager
- 'Default Team' will include all agents and all calls

Custom

- Custom User Roles can be created which allow access to any of the five below tabs
    - Scorecard
    - Calls
    - Leaderboard
    - Analyze
    - Moments
- Custom User Roles can have unique names (customer chosen), and be permissioned for all or specific team calls across the five view tabs.
- To create customer User Roles, reach out to your Observe.AI customer success manager