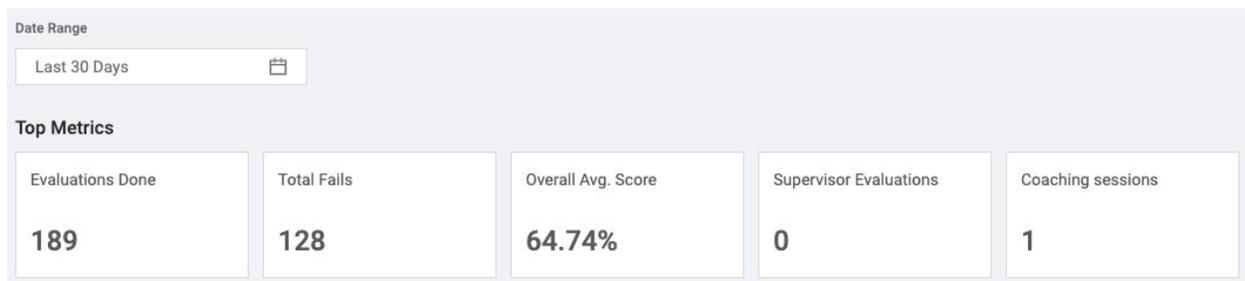# How to use the Observe.AI Agent Evaluation Dashboard – Overview

The purpose of this document is to review the agent evaluation dashboard page and how to use the evaluations that can be seen by agent.

Step 1 - Date Range and Top Metrics

Within the Agent Evaluation Dashboard, you can specify a date range for the agent you are looking at. Once the date range has been specified, the top metrics and all of the data on the screen will change along with it.

Date Range				
Last 30 Days 🗓				
Top Metrics				
Evaluations Done	Total Fails	Overall Avg. Score	Supervisor Evaluations	Coaching sessions
189	128	64.74%	0	1

Top Metrics:

- **Evaluations Done** - How many evaluations have been done for the agent
- **Total Fails** - Number of evaluations that failed (the percentage of what is considered a pass/fail is configured initially with your onboarding manager)
- **Overall Average Score** - The average score of the evaluations completed for the agent
- ****Supervisor Evaluations** - The amount of Supervisor Evaluations that have been completed for the specified date range.

*This page is currently in the beta tab. The Beta Tab in Observe.AI is used to indicate that the capability is close to General Availability, but there may be known issues, limitations, as well as further customer validation of the use case that is required.
**Please note that some features may not be enabled on your account. If you have any questions, please reach out to your customer success manager.

- ****Coaching Sessions** - Number of coaching sessions that have occurred for the agent for the specified date range.

Step 2 - QA Evaluation Calendar View

Name	Total	Avg. Score	Sep 2020						
			18	17	15	14	13	12	11
QA Eval Form	140	65.04%	8 21 3	1	1 2	1	1	1 1	1
QA Evaluation Form	367	67.47%	12 4 31	1	2 1	1	1	1 1	1
Supervisor Form	3	-							1
Coaching Sessions	4	-		1					

With the QA Evaluation Calendar view, each of the forms for evaluation are split out by the total evaluations done, and the average score. For each form, there is a calendar heatmap showing a color coding (e.g. Green - Pass, Purple - Satisfactory, Red - Fail) of the evaluations done and the days they were completed. The supervisor forms and coaching sessions will also note the dates where they were completed.

Step 3 - Areas of Opportunity

Areas of Opportunity ⓘ	
Major missed opportunities (12)	No of occurrences
5. Did the agent maintain a positive and friendly tone throughout the call QA Evaluation Form	15
4. Did the agent adhere to standard procedures QA Evaluation Form	14
3. Did the agent verify / authenticate the user QA Evaluation Form	13

Areas of opportunity include all of those questions where an agent has been given a negative response in an evaluation:

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Major missed opportunities: Will provide the questions that have had negative responses.
No of occurrences: How many times this particular question has had a negative response.

**Step 4 - Last coaching Note

Within the Last Coaching Note segment of the page, you can see the notes of the last coaching session that this agent received.

- **Coaching Date**: The date of this specific coaching session
- **Coaching Area**: The subject of this coaching session. This is a free-form data entry field that the coach can decide.
- **Feedback**: Any specific talking points from the coach
- **Action Plan**: What are the necessary steps for the coach/agent
- **Followup Date**: When will the coach reach out to the agent again.
- **View all Coaching Notes**: Hyperlink that will take you to the Coaching Notes Tab

Last Coaching Note

Coaching date:	Sep 17, 2020
Coaching Area:	n/a
Feedback:	feedback about " Did the agent verify / authenticate the user"
Action Plan:	check back in 2 weeks
Followup Date:	Oct 01, 2020 15 days ago

View all coaching notes

**Step 5 - Creating a Coaching Session

To create a coaching session for the agent you are looking at, review the "How to use the Observe.AI for Coaching Session Creation - Overview" article.

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