

| CallID | QA Evaluation Summary | Script Flow | Script Flow Comment | Caller Introduction | Introduction Comment | Listens to Client | Listens to Client Comment | Call Recording | Call Recording Comment |
|----------|---|-------------|---|---------------------|---|-------------------|--|----------------|---|
| xxxxxxxx | The agent effectively followed the script, engaged with the prospect professionally, and ensured all necessary details were collected before transferring to the advisor. | Yes | Agent followed the script by introducing [brand], confirming residency, collecting personal details, and transferring to advisor. | Yes | Agent provided a clear and friendly introduction at the beginning of the call. | Yes | Agent actively listened, showed empathy, and maintained professionalism throughout the conversation. | Yes | Agent disclosed the call recording, explained its purpose, and obtained client consent. |
| xxxxxxxx | The agent effectively followed the script, engaged with the prospect professionally, and transferred to an [product] advisor for further assistance. | Yes | Agent followed the script, introduced [brand], confirmed residency, collected personal details, and transferred to [product] advisor. | Yes | Agent provided a professional and friendly greeting at the beginning of the call. | Yes | Agent actively listened, demonstrated empathy, and maintained professionalism throughout the conversation. | Yes | Agent disclosed the call recording, explained its purpose, obtained consent, and followed business rules. |
| xxxxxxxx | The agent failed to adhere to the script but maintained professionalism and engaged with the prospect effectively. | No | Agent did not follow the script properly, did not confirm residency status or personal details, and did not transition to a licensed advisor. | Yes | Agent provided a clear and friendly introduction and greeting at the beginning of the call. | Yes | Agent maintained professionalism and engaged with the prospect throughout the conversation. | No | Agent did not disclose the call recording, explain purpose, or obtain consent, violating business rules. |
| xxxxxxxx | The agent effectively followed the script, engaged with the prospect professionally, and ensured a smooth transition to a licensed advisor for further discussion on [product] options. | Yes | Agent followed the script by introducing [brand], confirming residency, collecting personal details, and transitioning to a licensed advisor. | Yes | Agent provided a clear and friendly introduction at the beginning of the call. | Yes | Agent actively listened, demonstrated empathy, and maintained professionalism throughout the conversation. | Yes | Agent disclosed the call recording, explained its purpose, and obtained client's consent. |
| xxxxxxxx | The call lacked clarity, professionalism, and engagement. The agent failed to follow the script and build rapport with the prospect. | No | Agent did not clearly explain the purpose of the call or [brand]'s services, leading to confusion. | No | Multiple interruptions and lack of clear greeting affected the professionalism of the call. | No | Agent did not actively listen, rushed through questions, and lacked empathy towards the prospect. | Yes | Agent disclosed the call recording, explained its purpose, and obtained client consent professionally. |

Advancing Ethical AI using Human in Loop processes

AI AutoScorecards in AutoInsights improve accuracy in several ways by leveraging advanced AI algorithms, machine learning techniques, and human-in-the-loop validation processes. Here's how they contribute to enhanced accuracy:

1. Automated and Objective Scoring:

- **AI AutoScorecards** remove the subjectivity that can often occur in manual quality assurance (QA) processes. AI evaluates every interaction consistently based on pre-defined criteria, ensuring there are no variations in scoring across different agents or evaluators.
- The algorithms are trained to identify specific behaviors, compliance issues, and key performance indicators (KPIs) across all customer voice interactions. This ensures every conversation is evaluated based on the same criteria, without human bias.

2. Scoring 100% of Customer Interactions:

- Unlike traditional QA processes that sample only a fraction of calls, **AI AutoScorecards** can analyze 100% of customer interactions, ensuring no critical conversation goes unnoticed. This results in more comprehensive data and insight into trends, behavior, and compliance issues that may be missed in random sampling.
- By covering all interactions, AutoInsights gives businesses a more accurate picture of their overall performance and any potential areas for improvement.

3. Generative AI for Enhanced Context:

- With **Generative AI**, AutoInsights doesn't just score based on keywords or isolated data points—it understands the context of the conversation, identifying sentiment, emotion, and intent. This allows the system to provide a more accurate assessment of agent performance, ensuring scores reflect the true nature of the interaction.
- For instance, it can recognize when empathy was expressed in difficult customer situations or when compliance was adhered to, even in complex or nuanced discussions.

4. Customer-in-Loop Validation:

- **Customer-in-the-loop** measures add an extra layer of validation to ensure the AI-generated scores are accurate. Customers can provide feedback on whether the AI's assessment aligns with their experience, and this feedback can be used to continuously refine the AI's scoring algorithms.
- This process helps the AI system learn and adjust its understanding of various contexts, improving its accuracy over time as it adapts to real-world customer feedback and behavior.

5. Adaptive Machine Learning:

- **AI AutoScorecards** utilize machine learning algorithms that improve over time. As more data is analyzed, the system becomes better at identifying patterns, detecting anomalies, and refining its scoring models.
- This adaptive nature ensures that the scoring becomes more precise as the AI is exposed to a broader range of interactions and agent behaviors, leading to continuously improving accuracy.

6. Human-in-the-Loop QA:

- While AI provides the initial scoring, human QA analysts are involved in a **human-in-the-loop** process to validate AI scores for specific calls. These expert QA evaluators fine-tune AI models by verifying the accuracy of scores and ensuring that the AI is learning from actual human behaviors and nuances.
- This validation process helps build confidence in AI-driven scoring, ensuring that the AI models are calibrated correctly for the specific needs of the business.

7. Customizable for Business Needs:

- **AI AutoScorecards** are highly customizable, allowing businesses to tailor the scoring to their specific industry requirements, KPIs, or regulatory compliance needs. This adaptability ensures that scores are not just accurate, but also relevant to the business's unique operational goals.

8. Continuous Monitoring and Governance:

- AutoInsights includes monitoring tools to ensure that AI scoring remains stable and explainable. Governance frameworks built into the system allow businesses to track how the AI is making decisions, ensuring transparency and accountability in the scoring process.
- Regular monitoring ensures that if there are shifts in agent performance, customer expectations, or compliance requirements, the AI system adjusts to these changes and maintains its scoring accuracy.

In Summary:

AI AutoScorecards in AutoInsights improve accuracy through consistent and objective scoring, context-aware generative AI, customer and human validation, adaptive machine learning, and real-time feedback. These capabilities ensure that every customer interaction is assessed with precision, giving businesses a reliable and comprehensive understanding of their agent performance, compliance adherence, and overall customer experience.