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# Performance DNA Administrator Guide

Manually Managing DNA Base Data

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# Manually Managing DNA Base Data

You can define the basic data types from the **DNA Base Data Definitions** page which will be used to create DNA Strands. Performance DNA supports three types of DNA Base Data, they are as follows:

1. **Assessments** – Imported Assessment scores (historical) or Assessment data from a 3<sup>rd</sup> party system.
2. **KPI** – Imported Key Performance Indicators and other Performance data.
3. **Questions** – Imported from Assessments, but scored by the chosen question.

To create a new DNA Base Data,

1. Navigate to **Admin > DNA > Base Data Definitions**.

| Name                           | Data Type | Assessment/Question Name | KPI | Size | Thresholds | Repeat | Unit/Frequency | Multiplier | Agg. Method | Sort Order  | Offending Data Row |
|--------------------------------|-----------|--------------------------|-----|------|------------|--------|----------------|------------|-------------|-------------|--------------------|
| ACT-Act Time                   | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| ACT-Act                        | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| ACT-Act (KPI)                  | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Assessment - Product Knowledge | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Assessment - Product Offering  | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Sales                          | KPI       |                          |     | 400  | 400        | 400    | 400            | 1          | Average     | Whole Value | Stop               |
| Complaints Received            | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - CSAT                      | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - NPS                       | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - NPS                       | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Extended Warranty              | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Insurance Sales                | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - Agent Attitude            | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - Customer Info Fit         | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| CX - Customer Understanding    | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Report                         | KPI       |                          |     | 400  | 400        | 400    | 400            | 1          | Average     | Whole Value | Stop               |
| Sales - Average Sales Value    | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Sales - Conversion Rate%       | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Sales - Sales per Hour         | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |

2. On the **Base Data Definitions** page, you will see a list of Base Data already configured in the system. If you want to create a new Base Data, scroll down to the bottom of the page and click **+ ADD**. You can see the newly inserted row at the bottom of the table as shown below.

| Name                        | Data Type | Assessment/Question Name | KPI | Size | Thresholds | Repeat | Unit/Frequency | Multiplier | Agg. Method | Sort Order  | Offending Data Row |
|-----------------------------|-----------|--------------------------|-----|------|------------|--------|----------------|------------|-------------|-------------|--------------------|
| GM - Agent's Associate      | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| GM - Customer Info Fit      | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| GM - Customer Understanding | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Report                      | KPI       |                          |     | 400  | 400        | 400    | 400            | 1          | Average     | Whole Value | Stop               |
| Sales - Average Sales Value | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Sales - Conversion Rate%    | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
| Sales - Sales per Hour      | KPI       |                          |     | 100  | 100        | 100    | 100            | 1          | Average     | Whole Value | Stop               |
|                             | None      |                          |     |      |            |        |                |            |             |             |                    |

3. Click **None** in the **Data Type** column, you will see a modal window.
4. On the **Choose Data Type** modal window, select the Data Type for the Base Data you are creating. You can select:
  - KPI
  - Assessment or
  - Question

5. Click **Next**.
6. Based on the **Data Type** selected, the values you enter might differ, see [Data Type Definition](#) to know what values are changing. Enter the data type specific values and click **Finish**. Your new Base Data will be added to the existing list.
7. Specify other details by referring to [Base Data fields](#).
8. Click **Save**.
9. Click **Revert**, if you want to cancel and redo the definition.

### Important

The Base Data Definition table works like a standard spreadsheet. If you want to edit a Base Data, edit the values right away in the table and click **Save**.

## Data Type Definition

This section explains how you define your Data Type values for different Base Data.

### For KPI

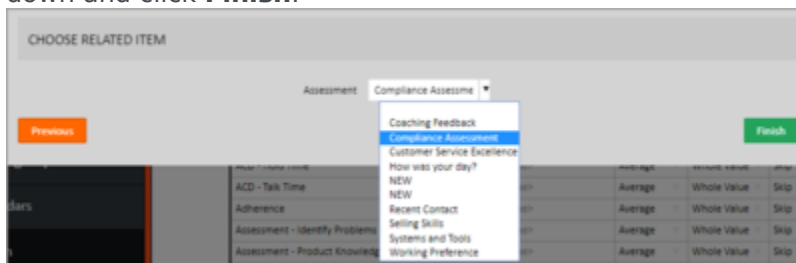
If you are defining a KPI as Base Data, specify the KPI name and click **Finish**.



The screenshot shows a dialog box titled "CHOOSE RELATED ITEM". It has a text input field labeled "Name" with the value "TestKPI" entered. Below the input field are two buttons: "Previous" (orange) and "Finish" (green).

### For Assessments

If you are defining an assessment as Base Data, you can choose the assessment name from the drop down and click **Finish**.



The screenshot shows a dialog box titled "CHOOSE RELATED ITEM". It has a dropdown menu labeled "Assessment" with "Compliance Assessment" selected. Below the dropdown is a table with columns: "Assessment", "Metric", "Metric Value", and "Unit". The table contains several rows of data, including "ACD - Talk Time", "Adherence", "Assessment - Identify Problems", and "Assessment - Product Knowledge". A "Previous" button (orange) is on the left and a "Finish" button (green) is on the right.

### For Questions

Questions are part of an assessment. If you are defining a question as Base Data, you must first search the question from the list of questions, select the required question using the radio button and click **Finish**.

The screenshot shows a web interface titled "CHOOSE RELATED ITEM". At the top is a search bar containing the text "complaint". Below the search bar is a table with two columns: "Question Text / HTML" and "Question Type". The table contains five rows of questions related to customer complaints. The first two rows have a "Pick Correct" question type, while the last three have a "Multiple Choice" question type. At the bottom of the table, there is a pagination bar showing "10 items per page" and "1-5 of 5 items". There are also "Previous" and "Finish" buttons at the bottom of the interface.

| Question Text / HTML   | Question Type   |
|--|-----------------|
| PCI Compliance: What should you do to protect customer's credit card details? (Select all that apply)  | Pick Correct    |
| Process Complaint: I have been waiting for 2 weeks for my Welcome Pack. I was told that it will arrive via mail within 3-5 business days. Without it I can't use my service yet I'm still being charged! What action will you take to address customer's complaint? (Select all that apply)  | Pick Correct    |
| Product Complaint: I added the Sports Basic plan to my existing cable TV subscription 2 months ago. I was hoping I'd be able to watch English Premier League games and international test cricket matches however these channels are not included in this plan. This Sports Basic plan is rubbish and I don't want it anymore! How will you respond to the customer? | Multiple Choice |
| Service Complaint: Customer has called in to complain about the previous agent who is alleged to have been rude and insensitive towards the customer. What should you do?  | Multiple Choice |
| Supervisor Related: What should you do if your supervisor does not adhere with compliance guidelines? (Select all that apply)  | Multiple Choice |

### Important

If you do not remember any keyword for searching a question, you can directly click the search icon to retrieve all the questions.

The Question values will be taken only when the Assessment which has the question is in *completed* status. The values are not displayed if the test is *partially completed*. The values are open ended (no end date) but will update when the question has been answered in later completed assessment.

## Base Data Fields Description

For the Base Data, provide a unique Name, description and then configure the remaining information as required, including:

- **Name** – this must be a unique name. In environments with several measures of similar names best practice would be to prefix the name with the business area i.e. Sales – AHT, Email – AHT. For Questions, you can edit the automatically populated name with a shorter name.
- **Assessment Name** – this links the imported value to a specific Assessment within the system. To select the Assessment, you can either start typing the name and select the Assessment from the auto filtered list, or you can select the Assessment manually from the drop down list.
- **Min (value)** – this is used to normalize the lowest value expected for the KPI. For example, if you enter 5 as the default minimum value, any imported values that are less than 5 will be rounded up to 5. For Questions, this value is set as 0 and you cannot edit it.
- **Max (value)** – this is used to normalize the highest value expected for the KPI. For example, if you enter 100 as the default maximum value, any imported values that are greater than 100 will be rounded down to 100. For Questions, this value is set as 100 and you cannot edit it.
- **Thresholds** – this allows you to assign a previously created Threshold to this base data definition\*. If there are no Thresholds available, this column will just show "<None>".
- **Flipped\*** – by default Performance DNA assumes that higher scores are indicative of better performance ('better'). In some cases, like Average Handle Time (AHT) or Hold Time (HT) lower values are normally considered better. By checking this option, the system treats lower scores as better.
- **Load Frequency** – From the dropdown select if the Base Data is measured, and imported, at a Daily,

Weekly or Monthly level.

- **Multiplier** – this is used to set the Load Frequency recurrence.
  - 1 means the data is expected every Day, Week or Month
  - 2 would indicate the data is expected every 2<sup>nd</sup> Day, Week or Month
- **Agg. Method** – defines the aggregation method used when reporting on this data. The options are:
  - **Sum** – the values are added together
  - **Average** – the values are averaged
  - **No Aggregation Allowed** – if the reporting period is larger than the data frequency, then no value will be available for this item. (i.e. if you try to view a “daily” data item for a reporting period of more than one day)
- **Part Period** – defines how data is reported when the data frequency is smaller than the reporting period (i.e. reporting for a week when the data is imported monthly). The options are:
  - **Whole Value** – uses the value for the period in its entirety
  - **Fraction** – scales the value for the data to the fraction of the reporting period that it falls within (i.e. a weekly value of “7” would score “1” for a single day)
  - **Reporting not allowed** – if the reporting period does not match the data frequency, no value will be available for this item.
- **Missing Data Handling** – defines what data is to be used if there is gap in the imported values. The options are:
  - **Default Value** – User defined default value
  - **Skip** – Just use the data that is in the system
  - **Do Not Calculate** – No value is used if there is missing data for a Base Data Definition.
- **Value** – this is the user defined value that will be used if there is missing data for this Base Data Definition.
- **Precision** – The number of decimal places that this Base Data Definition should be reported to.
- **Aliases** – These are additional names related to a specific Base Data. These names are used to match the KPI name while importing the KPI data through the KPI uploader.

\* When **Flipped** is checked, the lower end of the data value range aligns with the upper end of Thresholds, and vice-versa.

**Note:** Once a valid and unique name has been created the validation error will be removed.

Once you have configured the Base Data details click **Save** to create the Base Data. If there are any validation errors these will be shown below the Base Data Definitions grid.