

Quality Management

Section	Description
Module Context	Part of Quality, Performance, and Engagement Management within Genesys Cloud Workforce Engagement Management (WEM).
Purpose	Enables supervisors to record interactions, evaluate agents, analyze conversations, gather customer feedback, and coach agents to improve service quality and compliance.
Admin Location	Admin → Quality
Alt Navigation (most sub-sections)	Menu → Conversation Intelligence → ... (see Navigation table below)
Core Capabilities	Recording encryption, evaluations, surveys, policies, speech & text analytics, topic mining, sentiment analysis, and coaching tools.

Quality management helps organizations monitor interactions, enforce compliance, evaluate agent performance, and gain insights into customer conversations using analytics and feedback tools.

Study Notes

Topic	Explanation
Quality Management	Framework for evaluating and improving agent interactions and service quality.
Interaction Recording	Captures voice and digital interactions for compliance and review.
Evaluation Forms	Scorecards used to evaluate recorded interactions and measure agent performance.
Surveys	Customer feedback collected after interactions (e.g., CSAT or NPS).
Policies	Automation rules for evaluation assignment, recording retention, calibration, and surveys.
Topic Miner	Identifies frequently occurring phrases or topics in conversation transcripts.

Topic	Explanation
Speech & Text Analytics	AI-powered analysis of transcripts to identify trends, topics, and sentiment.
Topics & Programs	Structured definitions used to track business-level intents within interactions.
Sentiment Feedback	Allows administrators to correct incorrectly classified phrases in sentiment analysis.
Recording Management	Controls recording infrastructure: screen recording concurrency, URL expiration, storage region, and orphaned recordings.

Navigation

Feature	Admin Navigation	Alt Navigation
Encryption Keys	Admin → Quality → Encryption Keys	—
Evaluation Forms	Admin → Quality → Evaluation Forms	Menu → Conversation Intelligence → Quality Management → Evaluation Forms
Survey Forms	Admin → Quality → Survey Forms	—
Policies	Admin → Quality → Policies	Menu → Conversation Intelligence → Recording and Policies → Policies
Evaluators (Dashboard)	Performance → Overview → Quality Evaluator	Menu → Conversation Intelligence → Quality Management → Evaluators
Recording Management	Admin → Quality → Recording Management	Menu → Conversation Intelligence → Recording and Policies → Recording Management
Topic Miner	Admin → Quality → Topic Miner	—
Speech & Text Analytics	Admin → Quality → Speech & Text Analytics	—
Sentiment Feedback	Admin → Quality → Sentiment Feedback	—
Topics	Admin → Quality → Topics	—
Programs	Admin → Quality → Programs	—

Configuration Fields (UI Form Fields)

Encryption Keys

Field	Description	Options
Key Configuration Type	Encryption key management model	Genesys Cloud Managed Keys / Local Key Manager / AWS KMS Symmetric
Periodic Key Change	Frequency for generating new encryption keys	Daily / Weekly / Monthly / Yearly / Never
Save	Save encryption configuration	Button

Evaluation Forms

Field	Description	Options
Create	Creates a new evaluation form	Button
Form Name	Name of the evaluation form	Text
Last Modified	Timestamp of last modification — also serves as version ID	Read-only
Question Group	Category grouping related questions	Example: Compliance / Customer Experience
Add Question	Adds new evaluation question	Button
Question Type	Type of evaluation question	Multiple Choice / Yes-No / Range
Question Name	Question text shown to evaluator	Text
Help Text	Tooltip guidance for evaluator	Text
Points	Score value assigned to answers	Numeric
Require Additional Comments	Forces evaluator to add a comment	Toggle
Conditional Question	Displays question based on previous answer	Toggle

Field	Description	Options
Fatal Question	Incorrect answer fails entire evaluation automatically	Toggle
Critical Question	High-impact question — affects score but does not auto-fail	Toggle
Save	Save draft evaluation form	Button
Publish	Make form available for evaluators and policies	Button

Survey Forms

Field	Description	Options
Create	Create new survey form	Button
Survey Language	Language used for survey	Dropdown
Survey Form Name	Internal survey identifier	Text
Header	Instructions or images displayed to customer	Text / Image
Add Question	Add survey question	Button
Question Type	Survey question format	Multiple Choice / Yes-No / Range / Free Text / NPS
NPS Question	Net Promoter Score question	Only one NPS question allowed per survey
Save	Save survey form	Button
Publish	Publish survey form	Button
Preview Form	Preview survey before publishing	Button

Policies

Field	Description	Options
Create New Policy	Creates new quality policy	Button
Policy Name	Name of policy	Text
Description	Policy purpose	Text

Field	Description	Options
Media Type	Interaction type tabs	Call / Chat / Email / Message (each configured separately)
Conversation Direction	Interaction direction filter	Inbound / Outbound
Specific Users / Work Teams	Restrict policy to specific users or teams	Dropdown
Specific Queues	Apply policy to queues	Dropdown — max 250 recommended
Specific Wrap-Up Codes	Filter interactions by wrap-up result	Dropdown
Time Sets	Apply policy during specific time ranges	Dropdown
Date Range	Policy date criteria	Calendar
Conversation Duration	Match interactions by duration	Numeric — includes queue time and ACW
Customer Participation	Match email/message by customer participation	Participated / Did not participate
Recording Retention	Required field — Define recording retention	Retain / Do Not Save
Export Recordings	Export recordings to AWS S3	Toggle
Screen Recording	Enable screen recording (ACD only)	Toggle — max 365 days retention
Create Evaluations by Evaluators	Assign fixed evals per evaluator per period	Toggle
Create Evaluations by Agents	Assign fixed evals per agent per period	Toggle
Create Evaluations by Interaction	Assign eval for every matching interaction	Toggle
Create Calibration Evaluations	Generate calibration sessions	Toggle
Send Web Survey	Automatically send surveys	Toggle — requires Architect Survey Invite Flow

“ **Evaluation limits:** Max **50/day, 175/week, 700/month** per agent. **No-match behavior:** Recordings without a matching policy are retained indefinitely (or up to org maximum if configured).

Recording Management

Field	Description	Options
Maximum Simultaneous Screen Recordings	Limits concurrent screen recordings	0–2000
Recording Playback URL Time-to-live	How long playback links remain valid	2–60 minutes (default 60)
Recording Batch Download URL Time-to-live	How long download links remain valid	2–60 minutes (default 60)
Storage of Call Recordings	Recording storage region	Home Region / Global Media Fabric trunk region
Orphaned Recordings	Recordings stored on Edge device that failed to upload	Clickable link to manage

Topic Miner

Field	Description	Options
New Miner	Create mining job	Button
Language	Transcript language model	Dropdown
Data Source	Interaction data source	Genesys Cloud
Date Range	Time window to analyze	Calendar
Media Type	Interaction channel	Voice / Chat / Message / Email
Queue Selection	Select queues to mine	Up to 5 queues

Speech & Text Analytics Settings

Field	Description	Options
Voice Transcription	Enables transcription	Toggle
Transcript Confidence Threshold	Minimum confidence for inclusion	Default 40%
Low-Latency Transcription	Near real-time transcript generation	Toggle
Content Search	Enables transcript keyword search	Last 35 days

Sentiment Feedback

Field	Description	Options
Add Phrase	Add phrase for sentiment correction	Button
Phrase Text	Phrase as it appears in transcripts	Text
Sentiment Label	Correct sentiment classification	Positive / Neutral / Negative
Dialect	Speech analytics dialect model for phrase	Dropdown

Topics

Field	Description	Options
Topic Name	Unique topic identifier	Text
Description	Topic explanation	Text
Tags	Classification tags	Text
Strictness	Matching sensitivity	Low / Medium / High
Participants	Conversation participants analyzed	External / Internal / Both

Programs

Field	Description	Options
Program Name	Program identifier	Text
Dialect	Language dialect	Dropdown
Add Topics	Add topics to program	Button
Merge Phrases	Combine detected phrases	Toggle
Queue Mapping	Assign program to queues	Dropdown
Flow Mapping	Assign program to Architect flows	Dropdown

QM Roles and Permissions

Role	Key Permissions
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Quality Administrator	Manage encryption keys, policies, evaluation forms, calibrations, recordings, annotations
Quality Evaluator	Edit evaluations and annotations; view chats, recordings, encryption keys — requires Quality > Evaluation > Edit Score

“ Both roles are customizable. Quality Administrator recording access can be restricted to specific queues using conditions.

Dependencies

Component	Purpose
Interaction Recording	Required for evaluations
SIP Trunk (Line Recording enabled)	Required for call recording to function
Speech & Text Analytics	Enables transcript-based analysis
Architect	Required for survey invitation flows
Workforce Engagement Management	Integrates coaching and quality monitoring
AWS S3	Optional long-term or external recording storage

Platform Integration / Related Components

Component	Relationship
Architect	Sends surveys and triggers workflows
Analytics Workspace	Provides reporting dashboards
Workforce Engagement Management	Supports agent coaching and training
Interaction Recording	Captures interactions for evaluation
Gamification	Uses evaluation data for performance metrics

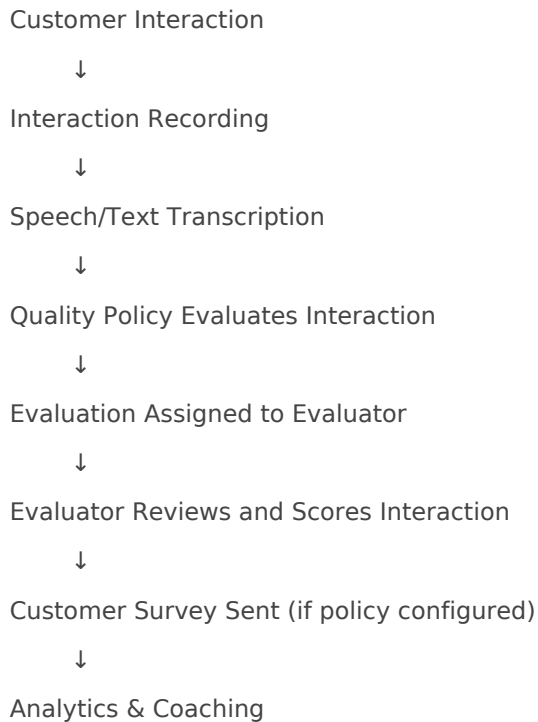
Implementation Checklist

Step	Status
Configure recording encryption keys	<input type="checkbox"/>
Enable Line Recording on SIP trunks	<input type="checkbox"/>
Enable interaction recording	<input type="checkbox"/>
Create evaluation forms	<input type="checkbox"/>
Publish evaluation forms	<input type="checkbox"/>
Create survey forms	<input type="checkbox"/>
Configure Architect survey invite flow	<input type="checkbox"/>
Create quality policies	<input type="checkbox"/>
Configure recording storage and URL TTL	<input type="checkbox"/>
Enable speech transcription	<input type="checkbox"/>
Configure topics and programs	<input type="checkbox"/>

Implementation Guide

Step	Action
Step 1	Configure recording encryption keys
Step 2	Enable Line Recording on SIP trunks
Step 3	Enable interaction recording
Step 4	Create and publish evaluation forms
Step 5	Create and publish survey forms
Step 6	Create Architect survey invite flow
Step 7	Create quality policies
Step 8	Configure Recording Management (concurrency, TTL, storage region)
Step 9	Enable speech transcription
Step 10	Configure analytics topics and programs

Workflow



Best Practices

Practice	Reason
Standardize evaluation forms	Maintain consistent scoring
Use speech analytics	Detect customer sentiment trends
Regularly review evaluations	Identify coaching opportunities
Combine surveys and evaluations	Gain full customer experience insight
Define clear policies	Automate quality monitoring processes
Separate retention and evaluation policies	Keeps policies focused and manageable
Calibrate evaluators regularly	Ensures consistent scoring standards

Limitations / Constraints

Constraint	Description
NPS per survey	Only one NPS question per survey form
Policy scope	Applies only to interactions after activation
Screen recording	Maximum 365 days retention; ACD interactions only
Topic Miner	Limited to 5 queues per mining job
Evaluation limits	Max 50/day, 175/week, 700/month per agent
Content search	Up to 35 days of transcript data
Screen recording concurrency	Max 2000 simultaneous screen recordings
Playback/download URL TTL	2-60 minutes (default 60)

Interview Cheat Sheet

Question	Answer
What is Genesys Cloud Quality Management?	A system for evaluating interactions and improving service quality using recordings, evaluations, surveys, policies, and analytics.
What tools are included?	Evaluations, surveys, policies, recordings, speech analytics, topic miner, sentiment feedback, programs, topics.
What is a fatal question?	A question that automatically fails an evaluation if answered incorrectly.
What is Topic Miner?	Tool used to discover frequently occurring phrases in interaction transcripts.
What is sentiment feedback?	Allows administrators to manually correct sentiment classification errors.
What are evaluation assignment limits?	50/day, 175/week, 700/month per agent.
What happens to recordings with no matching policy?	Retained indefinitely (or up to org maximum).
What is the version ID for an evaluation form?	The last-modified date/time timestamp.
Where do evaluators access their dashboard?	Performance → Overview → Quality Evaluator

Key Takeaways

Topic	Summary
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Quality Management	Ensures high service standards through evaluation, recording, and analytics
Evaluation Forms	Structured scoring — fatal questions auto-fail; critical questions heavily impact score
Surveys	Capture customer feedback — one NPS per survey; require Architect invite flow
Speech Analytics	Automated transcript analysis — confidence threshold default 40%; search up to 35 days
Policies	Automate evaluations, surveys, and recording retention — 3 evaluation assignment methods
Evaluation Limits	50/day / 175/week / 700/month per agent
Coaching	Evaluations and analytics drive performance improvement
Recording Management	Screen recording max 2000 concurrent; URL TTL 2-60 min; storage home region or GMF

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