

Supervisor Copilot

Genesys PureCloud

Supervisor Copilot

Documentation

Study Notes

Topic	Description
Supervisor Copilot	AI-powered assistant providing real-time insights for supervisors
Virtual Supervisor	Automates evaluation scoring using AI for 100% of interactions
AI Scoring	Automated performance evaluations with transparency and fairness
Analytics Explorer	AI Skill providing historical and real-time data insights
Quality Management	Automates routine tasks, focuses supervisors on coaching
Time Savings	40% reduction in quality evaluation time, 25% in multilingual work

Navigation

Admin → Quality Management → Virtual Supervisor OR Quality → Evaluation Dashboard → AI Scoring Settings

Supervisor Copilot Overview

Supervisor Copilot is an AI-powered toolkit designed to enhance supervisor productivity and decision-making in the contact center. It acts as a sidekick for managers, providing prescriptive support for quality assurance, compliance and coaching. Powered by generative AI, it automatically summarizes interactions, allowing supervisors to quickly review and make informed decisions.

Virtual Supervisor and Supervisor Copilot are AI-powered tools designed to support and enhance supervisor workflows. These features combine powerful capabilities (AI scoring, summary, insights, and translate), to deliver a smarter, more efficient way to monitor performance, gain clarity from conversations, and act quickly on key information.

Key Capabilities

- AI Scoring for automated performance evaluations of 100% of interactions
- AI Summary & Insights capturing full conversation context
- AI Translate converting transcripts into 70+ languages
- Automated interaction summaries highlighting key moments
- Reason for contact, resolution, action items, sentiment drivers
- Advanced quality and conversational intelligence
- Compliance monitoring across interactions
- Coaching opportunity identification
- Real-time performance insights
- Integration with Agent Copilot data

Performance Improvements

Organizations using Supervisor Copilot report:

- 40% reduction in quality evaluation time
- 25% reduction in multilingual evaluation time
- 38% decrease in quality management administrative costs
- Better coaching effectiveness through data-driven insights
- Improved compliance and consistency
- Enhanced agent performance and satisfaction

Edition & Module Requirements

Requirement	Details
Minimum Edition	Genesys Cloud CX 1-4 (CX 3-4 recommended)
Module	Virtual Supervisor or Supervisor Copilot add-on
License Type	Required for quality scoring and analytics
AI Tokens	Consumption based on evaluation volume
Features	AI Scoring, AI Translate, AI Summary & Insights

Study Notes - Supervisor Copilot Components

Component	Function	Benefit
AI Scoring	Automated evaluation of interactions	100% coverage, consistency, reduced manual work
AI Translate	Multi-language transcript conversion	Faster multilingual review, 25% time reduction
AI Summary & Insights	Key points extraction and analysis	Quick understanding, identified coaching needs
Reason for Contact	Automatic issue categorization	Pattern identification, trend analysis
Resolution Status	Whether issue was resolved	Outcome tracking, quality assessment
Action Items	Follow-up tasks identified	Process improvement, compliance tracking
Sentiment Drivers	What caused customer emotion	Root cause analysis, service improvement
Analytics Explorer	Data visualization and trends	Real-time insights, strategic visibility

Virtual Supervisor & AI Scoring

What is Virtual Supervisor?

Virtual Supervisor enhances Quality Management by leveraging AI to automate interaction evaluations. It automatically scores interactions and delivers actionable insights, highlighting areas

for improvement and explaining the rationale behind each assessment. By reducing the need for manual reviews, Virtual Supervisor empowers supervisors to more effectively support agents and focus on coaching and performance development.

How AI Scoring Works

Interaction Completed

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Virtual Supervisor Receives Transcript

└ Recording

└ Transcript

└ Agent info

└ Customer info

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AI Analysis Engine Evaluates

└ Compliance requirements

└ Quality standards

└ Best practices

└ Behavioral criteria

└ Customer outcomes

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Scoring Process

└ Question 1: Did agent greet properly?

| └ AI Analysis: YES - "Agent used proper greeting with company name"

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└ Question 2: Compliance disclosure given?

| └ AI Analysis: YES - "Agent stated privacy policy per minute 2:15"

|

└ Question 3: Issue resolved?

| └ AI Analysis: YES - "Customer confirmed satisfaction at end"

|

└ Question 4: Proper tone used?

| └ AI Analysis: PARTIAL - "Professional but slightly rushed in places"

|

└ Question 5: Call handled efficiently?

└ AI Analysis: YES - "Average handle time 6.2 min vs queue avg 6.8"

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Score Generated

└ Greeting: 10/10

└ Compliance: 10/10

└ Resolution: 10/10

└ Tone: 7/10

└ Efficiency: 9/10

└ Overall Score: 92/100

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Justifications Provided

└ Strengths: Compliance excellent, efficient handling

└ Improvement Areas: Pacing during explanations

└ Coaching Recommendations: Practice clear, methodical explanations

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Delivered to Supervisor

└ Score with justifications

└ Transcript highlighting

└ Coaching suggestions

└ Comparison to standards

AI Scoring Features

Automated Scoring

- Scores 100% of interactions (not just sample)
- Consistent application of standards
- Eliminates evaluator bias
- 24/7 operation (no human scheduling)

Transparency & Fairness

- AI-generated justifications for each score
- Shows reasoning behind assessments
- Highlights both strengths and improvements
- Supervisors can review and adjust before final score
- Promotes fair and consistent evaluation

Multi-Question Coverage

- Behavioral criteria (tone, empathy, etc.)
- Compliance requirements (disclosures, adherence)
- Process adherence (proper steps followed)
- Customer outcomes (satisfaction, resolution)
- Efficiency metrics (handle time, efforts)

Quality Control

- Supervisors review and approve/adjust scores
 - Two-step process ensures accuracy
 - Learn from supervisor overrides
 - Continuous model improvement
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Analytics Explorer (AI Skill)

Analytics Explorer is the first AI Skill that provides historical and real-time data to help supervisors lower time-to-insight and access performance trends without complex dashboards.

What is Analytics Explorer?

Analytics Explorer uses natural language processing to let supervisors ask questions about metrics and trends in plain language, rather than navigating complex dashboards. It provides:

- Historical performance data
- Real-time metrics
- Trend analysis
- Comparative insights
- Anomaly detection
- Predictive indicators

How Analytics Explorer Works

Supervisor Question:

"Which agent had the highest AHT this week?"

Natural Language Processing

├ Identify: Query type (agent comparison)

├ Extract: Metric (AHT)

├ Parse: Timeframe (this week)

└ Understand: Ranking (highest)

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Data Query & Analysis

├ Retrieve: This week's AHT data for all agents

├ Calculate: Average per agent

├ Rank: By highest to lowest

└ Context: Compare to queue average

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Response Generated

"Agent James had the highest AHT this week at 8.3 minutes, which is 15% above queue average of 7.2 minutes. This is typical for his skill set but elevated compared to his personal average of 7.8."

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Additional Insights

- └ Trend: Increasing vs past 4 weeks
- └ Context: Why (queue complexity, etc.)
- └ Recommendation: Review calls, provide coaching

Common Analytics Explorer Queries

Performance Trends

- "What's Sarah's average handle time trend?"
- "Which queues had lowest CSAT this month?"
- "Show me top performers on calls answered"

Comparative Analysis

- "How does Team A compare to Team B on quality?"
- "Which channels have lowest first-contact resolution?"
- "What's the difference in AHT between morning and afternoon?"

Anomaly Detection

- "Why is call volume so high today?"
- "Which interactions had unusual sentiment?"
- "Show me abandonment spike causes"

Predictive Insights

- "What's the forecast for queue volume Friday?"
- "Which agents might need coaching based on trends?"
- "What's the predicted impact of staffing changes?"

Supervisor Workflows with Copilot

Quality Management Workflow

Traditional vs. AI-Powered Approach:

TRADITIONAL (16 hours/supervisor/week):

- └ Monday: Randomly select 25 interactions
- └ Tuesday: Listen to calls (2 hours)
- └ Wednesday: Score evaluations (2 hours)
- └ Thursday: Compile feedback (1 hour)
- └ Friday: Meet with agents individually (6 hours)
- └ Continuous: Handle urgent issues

AI-POWERED (10 hours/supervisor/week):

- └ Morning: Review AI Scoring of 100% interactions
 - └ 1 hour to review 150+ scored interactions
- └ Identify: Focus areas and top performers
 - └ 30 min (automated pattern detection)
- └ Deep Dives: Review specific interactions
 - └ 2 hours (only complex or critical ones)
- └ Coaching: Deliver targeted feedback
 - └ 4 hours (focused on high-impact areas)
- └ Analytics: Trend analysis and planning
 - └ 1.5 hours (data-driven decisions)
- └ Strategic: Process improvement and planning
 - └ 1 hour (freed-up supervisory time)

Time Savings: 6 hours/week per supervisor = \$12,000/year per supervisor

Quality Improvement: Data-driven coaching, 100% coverage vs. sampling

Coaching Workflow with AI Insights

Step 1: AI Scoring Identifies Issues

- └ Virtual Supervisor scores 100 interactions
- └ 15 need coaching on "tone and empathy"
- └ 8 have compliance gaps
- └ 3 show efficiency concerns

Step 2: Supervisor Reviews AI Justifications

- └ Reads AI explanations for each score
- └ Understands root causes
- └ Sees agent strengths highlighted
- └ Identifies coaching themes

Step 3: Supervisor Selects Coaching Targets

- └ Priority 1: Compliance gaps (critical)
- └ Priority 2: Tone issues (systemic)
- └ Priority 3: Individual efficiency (targeted)
- └ Recognition: Top performers (5 agents)

Step 4: Prepare Coaching Sessions

- └ Pull specific interaction examples
- └ Write coaching notes with AI suggestions
- └ Plan 1-on-1 meetings
- └ Prepare recognition for strong performers

Step 5: Conduct Coaching

- └ Share AI insights with agents
- └ Discuss specific examples
- └ Explain improvements with data
- └ Create development plans
- └ Recognize strengths and efforts

Step 6: Follow-Up

- └ Monitor next evaluations
- └ Use AI Scoring to track improvement
- └ Celebrate progress with agents
- └ Adjust coaching if needed

Real-Flow Scenarios

Scenario 1: Automated Quality Evaluation

Monday Morning - Quality Review:

Supervisor logs in at 9 AM

AI Scoring Summary Shows:

- ├ 147 interactions scored over weekend
- ├ Average quality score: 87/100
- ├ 3 interactions scored below 70 (below standard)
- ├ 12 interactions with compliance tags
- ├ 8 agents exceeded their personal average
- └ 2 high-risk interactions flagged

Supervisor Action (30 minutes):

1. Reviews 3 low-scoring interactions

- ├ Reads AI justifications
- ├ Listens to specific moments
- └ Identifies coaching points

2. Flags 12 compliance interactions

- ├ Shares with quality team
- ├ Schedules compliance training
- └ Creates preventive alerts

3. Celebrates high performers

- ├ Sends recognition messages
- ├ Shares with management
- └ Motivates team

Result: What would take 4-5 hours manually is done in 30 minutes

Quality: More objective, data-driven, fair evaluations

Coaching: More targeted, based on data insights

Scenario 2: Multilingual Evaluation

Wednesday - International Team Review:

Supervisor manages team across 3 languages:

- ├ English speakers (50%)
- ├ Spanish speakers (35%)
- └ French speakers (15%)

Traditional Approach:

- └ Must hire bilingual evaluators
- └ Or use translation services (slow, expensive)
- └ Or only evaluate in English (unfair)
- └ Result: Inconsistent quality evaluation

AI-Powered Approach:

- └ Virtual Supervisor AI Translates all transcripts
- └ All agents evaluated in supervisor's language
- └ Consistent standards across all languages
- └ Takes 25% of the time vs traditional methods
- └ Result: Fair, consistent, efficient

Supervisor Benefits:

- └ Evaluates all agents fairly
- └ No language barrier
- └ Consistent quality standards
- └ Time saved: 75% reduction in multilingual work
- └ No translation costs

Scenario 3: Compliance Monitoring

Friday End-of-Day - Compliance Check:

Supervisor needs to verify compliance for audit:

AI Scoring automatically:

- └ Reviewed 500 interactions this week
- └ Tagged required disclosures (100% coverage)
- └ Flagged missing compliance statements
- └ Noted proper documentation
- └ Generated compliance report

Supervisor Action (30 minutes):

- └ Reviews AI-generated compliance report
- └ Drills into 3 flagged interactions
- └ Notes pattern (new agents missing disclosure)
- └ Schedules training session

└ Reports 98% compliance to management

Traditional Manual Approach:

└ Would require sampling (maybe 10%)

└ Time: 8+ hours of listening

└ Coverage: ~10% of interactions

└ Risk: Might miss issues

└ Inefficient for audit

AI Result: 100% coverage, done in 30 min, comprehensive audit-ready report

Best Practices

Quality Management

- **Leverage AI Scoring** - Use 100% scoring to identify true patterns
- **Review Justifications** - Understand AI reasoning before coaching
- **Focus on High-Impact Areas** - Use data to prioritize coaching
- **Consistent Standards** - AI ensures consistent application
- **Regular Monitoring** - Use automated scoring for continuous improvement

Agent Coaching

- **Share Data** - Show agents the AI scoring and justifications
- **Be Fair** - Explain that all agents are scored equally
- **Focus on Development** - Use AI insights for targeted coaching
- **Celebrate Strengths** - Recognize what agents do well
- **Track Progress** - Monitor improvements with AI scores

Compliance & Governance

- **Regular Audits** - Use AI Scoring for continuous compliance tracking
- **Investigate Flags** - Review AI-flagged compliance issues
- **Training Reinforcement** - Provide coaching on compliance gaps
- **Documentation** - Keep records for audit purposes
- **Preventive Measures** - Address systemic issues proactively

Analytics & Insights

- **Use Analytics Explorer** - Ask natural language questions about data
 - **Trend Analysis** - Identify patterns and anomalies
 - **Comparative Insights** - Understand relative performance
 - **Forecasting** - Use predictive indicators for planning
 - **Data-Driven Decisions** - Base coaching and scheduling on evidence
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Implementation Guide

Step 1: Enable Supervisor Copilot

1. Navigate to Admin → Quality Management
2. Enable "Supervisor Copilot" features
3. Configure AI Scoring permissions
4. Set up Virtual Supervisor access
5. Enable Analytics Explorer AI Skill

Step 2: Configure AI Scoring

1. Define quality evaluation form
2. Map questions to AI scoring categories
3. Set scoring standards and thresholds
4. Configure supervisor review process
5. Establish approval workflow

Step 3: Train Supervisors

1. Explain AI Scoring capabilities
2. Show how to review AI justifications
3. Practice using Analytics Explorer
4. Establish new coaching workflow
5. Share best practices

Step 4: Establish Workflow

1. Define daily/weekly quality reviews
2. Establish coaching process
3. Create compliance monitoring procedures
4. Set up reporting and analysis
5. Establish escalation process

Step 5: Monitor & Optimize

1. Track adoption metrics
2. Gather supervisor feedback
3. Review AI Scoring accuracy
4. Optimize based on learnings
5. Refine training as needed

Interview Cheat Sheet

Question	Answer
What is Supervisor Copilot?	AI-powered assistant providing insights and automation for supervisors
What does Virtual Supervisor do?	Automates evaluation scoring of 100% of interactions with justifications
How much time is saved?	40% reduction in quality evaluation time, 25% in multilingual work
What is AI Scoring?	Automated evaluation using AI with transparency and fairness
How does fairness work?	AI-generated justifications explain every score, supervisors can adjust
What about multilingual?	AI Translate converts transcripts to 70+ languages automatically
What's Analytics Explorer?	AI Skill providing natural language access to metrics and trends
Can supervisors override AI?	Yes, review and adjust scores before finalizing
What's included in summary?	Reason for contact, resolution, action items, sentiment drivers
How accurate is AI Scoring?	Uses latest LLMs; continuously improving accuracy
Can it handle compliance?	Yes, flags compliance issues and monitors requirements
What's the ROI?	40% time savings + better quality through consistency

Question	Answer
How long to implement?	2-4 weeks for setup and training
What edition needed?	CX 3-4 recommended (CX 1-2 possible with add-on)
Does it work with Agent Copilot?	Yes, integrates seamlessly with Agent Copilot data

Key Takeaways

- **Automated Scoring** - Scores 100% of interactions vs. sampling
 - **Transparency** - AI justifications explain every score
 - **Fairness** - Consistent, objective evaluation across all agents
 - **Significant Time Savings** - 40% reduction in quality evaluation time
 - **Better Coaching** - Data-driven insights enable targeted development
 - **Multilingual Support** - AI handles 70+ languages automatically
 - **Compliance** - Automated monitoring and documentation
 - **Analytics Ready** - Natural language access to all metrics
 - **Integration** - Works seamlessly with Agent Copilot
 - **Continuous Improvement** - Learning from interactions and feedback
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Additional Resources

Official Documentation

- Virtual Supervisor & Copilot: help.mypurecloud.com/articles/about-virtual-supervisor-and-supervisor-copilot/
- AI Scoring: help.genesys.cloud/articles/about-virtual-supervisor/
- Supervisor Copilot Overview: help.genesys.cloud/articles/about-supervisor-copilot/
- Quality Management AI: help.genesys.cloud/articles/ai-driven-quality-management/

Support & Training

- Genesys University: genesys.com/training
 - Community Forums: <https://community.genesys.com>
 - Technical Support: <https://support.genesys.com>
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