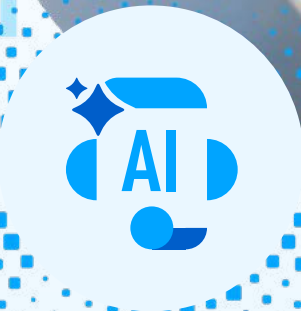


AI Supervisor Assist and AI Agent Evaluator Best Practice Guide



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AI SUPERVISOR ASSIST BEST PRACTICES

This guide provides supervisors with a comprehensive overview of AI Supervisor Assist and AI Agent Evaluator. Our goal is to equip you with the knowledge to leverage these features effectively, ensuring you can maximize their benefits for real-time coaching, agent support, and overall performance improvement.

WHAT IS AI SUPERVISOR ASSIST?

AI Supervisor Assist gives Contact Center supervisors real-time tools to coach more effectively, recognize strong performance as it's happening, and step in when calls need support — all while complementing your existing post-call review process.

With features such as **live sentiment monitoring**, **call transcription**, **AI-powered summaries**, **queue insights**, and **in-call feedback tools** (such as whisper and UC Chat), it helps supervisors take action during live interactions and reinforce learnings afterward.

On the queue dashboard, supervisors can view **Real-time AI Insights** on the Active calls tab.

At any point during the interaction, supervisor can search a **live call transcript** by clicking on the Transcript button.

Live, evolving sentiment helps supervisors know when to step in—whether to address an issue or acknowledge strong agent performance.

Supervisors see **live call topics with sentiment** to quickly assess conversation focus and urgency.

The screenshot displays the AI Supervisor Assist interface. On the left, a queue dashboard shows a list of active calls for 'Sales: New York'. The 'Active' tab is selected, showing 20 active calls. The table lists agents, calling numbers, caller names, on-hold status, and call durations. A call by Lars Timon is highlighted. On the right, a call detail view for Lars Timon is shown, including a 'join as agent' button, a 'Monitor' button, and a 'More' button. Below this, the 'AI Supervisor Assist' section displays a 'Sentiment' bar (green to red) and a 'Summary' section with call topics: 'Chest pain', 'Shortness of breath', and 'Cardiac issues'. A detailed summary of the call is provided: 'Alan Carter called the Cardiology Department reporting new, intermittent chest pains and is expressing concern about potential cardiac issues. He mentioned experiencing these pains over the past two days, particularly after physical exertion. Additionally, Mr. Carter described the pain as a dull ache in his chest, accompanied by occasional shortness of breath. He expressed worry about the possibility of a heart-related...'. A 'Live transcript' window is open, showing a search bar and a transcript of the conversation between the agent and the caller.

Agent	Calling number	Caller's name	On hold	Call duration
Lars Timon	1 650 2293506	Alan Carter		02:26
Angela Fon Mortines	1 345 5555555	G delivery		50:57
Olivia Thomas	1 650 2293506	Memo	11:10	12:35
Daniel Jackson	1 650 2293506		01:10	0:40
Emma Harris	1 650 2293506			0:39
Dany Gell	1 650 2293506			0:33
Ava Smith	1 650 2293506			0:21
Lars Timon	1 650 3802967	Summer company		0:20
Robert Jones	1 650 2293506			0:20
Isabella Brown	1 650 2293506			0:12
David White	1 650 2293506			0:10
Logan Scott	1 650 2293506			0:09
Dilara Umanov	1 650 2293506			0:05
Gretta Gumbert	1 650 2293506			0:03
Sarah Johnson	1 650 2293506			0:02

Supervisors can preview what's happening with **real-time summaries** before deciding to monitor or join.



REAL-TIME QUEUE INSIGHTS

Supervisors gain crucial real-time queue insights from the Real-Time Monitoring page. Key metrics such as hold times, call volumes, and call durations instantly highlight staffing gaps, workflow issues, or coaching needs.

WHAT TO LOOK FOR:

- Spikes in average hold time or call duration on specific queues.
- Agents who are consistently handling longer calls than their peers.
- Sudden shifts in queue volume — either building unexpectedly or dropping off.
- Queues with little activity during peak hours, which could indicate routing issues.

WHAT IT MEANS:

- Long hold times or rising call volumes can signal staffing gaps, high call complexity, or workflow issues.
- Consistently long call durations may point to coaching needs, poor process adherence, or unclear guidance.
- Sharp drops in call activity might indicate a technical problem, misconfigured routing, or a reporting issue.
- Idle queues during busy periods could mean uneven workload distribution or incorrect skill assignments.

HOW TO ACT ON IT:

- Shift agents between queues in real time to reduce wait times and balance workload.
- Check longer calls to identify whether agents need product support, clearer scripting, or process training.
- Monitor underused queues to diagnose routing or availability issues quickly.
- Use queue-level data to spot coaching trends (e.g., one team consistently resolving faster) and replicate successful behaviors across the organization.
- Pair queue data with sentiment and summary trends to triage where supervisor attention is most needed.



LIVE SENTIMENT ANALYSIS

Live Sentiment Analysis gives supervisors real-time insights into the call's emotional tone. It uses AI to analyze the words and tone customers use, updating the sentiment throughout the conversation. Supervisors can see which interactions are turning negative and prioritize where to focus their attention. This helps protect customer satisfaction and ensures agents get timely support.

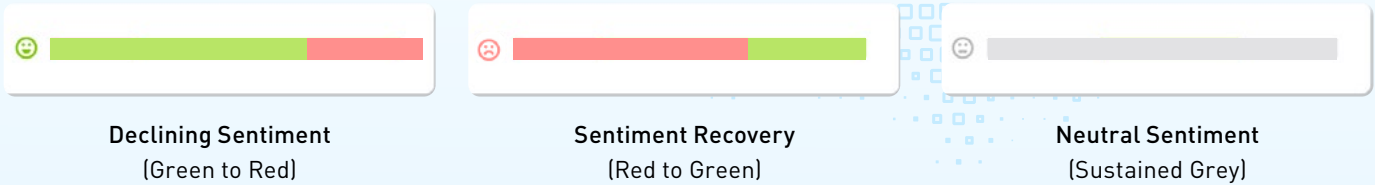
WHAT TO LOOK FOR:

Each call displays a sentiment color that updates in real time:

- **Green:** Indicates positive, cooperative language from the customer.
- **Red:** Suggests frustration, confusion, or negative sentiment.
- **Grey:** Signals neutral or unclear language — typically at the start of the call or when the system is unsure.



LIVE SENTIMENT ANALYSIS



WHAT IT MEANS:

- **Green to red:** The call is going sideways. Common causes: policy pushback, long hold times, agent uncertainty, or a disconnect in communication.
- **Red to green:** The agent is recovering the situation. This can indicate effective de-escalation, strong empathy, or a clear resolution path.
- **Sustained grey:** The system may not be detecting strong sentiment cues. This can happen with passive customers, quiet tones, or minimal conversation.

HOW TO ACT ON IT:

- **Don't just chase the red calls.** Some of your **best coaching opportunities are in red-to-green recoveries** — use these as examples of what good sounds like.
- **When sentiment shifts,** check the **live transcript** to understand what triggered it. Was it something the agent said? A policy they explained clearly?
- **If a red sentiment persists** without agent response, use **whisper or chat** to suggest clarifying questions, empathy statements, or escalation paths.
- **Since all calls are recorded,** consider flagging red-to-green recoveries as **training examples to share with new hires or for peer learning.**



LIVE TRANSCRIPTION

Live transcription provides a real-time, searchable record of every call, clearly distinguishing between the agent and the customer so you can track each side of the conversation independently. Every statement is tagged with sentiment—positive, negative, or neutral—allowing you to quickly assess tone and emotional shifts throughout the interaction. Because the transcript is indexed and time-stamped, supervisors can easily search for specific keywords, customer concerns, or agent behaviors. This level of visibility makes it easier to review key moments, coach agents more effectively, and identify patterns that may impact customer experience or compliance.

WHAT TO LOOK FOR:

In Support Environments:

- **Repeated customer questions** — a sign the agent’s explanation may be unclear or too technical.
- **Policy terms or trigger words** like “refund,” “cancellation,” or “supervisor” — often signal calls that may escalate.
- **Gaps in agent responses** — long pauses or repeated filler language can indicate agent uncertainty or hesitation.

The screenshot displays a call center interface with a central 'Live transcript' window. The transcript shows a conversation about a refund, with alternating agent (A) and customer (C) messages. The interface also shows a list of agents on the left and a supervisor assist panel on the right.

Agent	Calling number
Lars Timon	1 650 2293506
Angela Fan Mortines	1 345 5555555
Olivia Thomas	1 650 2293506
Daniel Jackson	1 650 2293506
Emma Harris	1 650 2293506
Dany Gell	1 650 2293506
Ava Smith	1 650 2293506
Lars Timon	1 650 3802957
Robert Jones	1 650 2293506
Isabella Brown	1 650 2293506
David White	1 650 2293506
Logan Scott	1 650 2293506
Dilera Umanov	1 650 2293506
Genie Guibert	1 650 2293506
Sarah Johnson	1 650 2293506

Live transcript

Search: Refund

A: I'm sorry to hear the product didn't meet your expectations. Is there anything I can do help address your concerns? 00:17

C: Yeah, I think I would just prefer a refund if possible? 00:20

A: Yes, we can certainly provide you with a refund. We can refund the charges to the credit card you used to make the purchase if that's alright with you? 00:24

C: Yeah, that would be fine. Thank you. 00:27

A: You're very welcome 00:31

AI Supervisor Assist

Sentiment: [Progress bar]

Summary: [Generate]

In Sales Environments:

- **Objections in the customer's language** — look for mentions of price, timing, or existing vendors.
- **Missed buying signals** — phrases like “how soon could we start?” or “what's the next step?” that go unacknowledged.
- **Leading questions from agents** — the difference between discovery and pitching too early is often visible in how questions are framed.

In General:

- **Sentiment shifts in context** — pair what's happening in the transcript with live sentiment changes to understand cause and effect.
- **Unusual call flow** — customers driving the conversation or agents backtracking may indicate coaching opportunities.
- **Searchable moments** — leverage the transcript's search to zero in on high-risk or high-value calls without listening live.

WHAT IT MEANS:

- Repetition signals confusion — the agent may not be explaining themselves clearly.
- Keywords often indicate escalation risk or common support scenarios.
- Pauses and fillers can point to agent uncertainty or lack of confidence.
- Ignored buying signals = missed sales opportunities.
- Transcripts paired with sentiment show not just what was said, but how it landed.

HOW TO ACT ON IT:

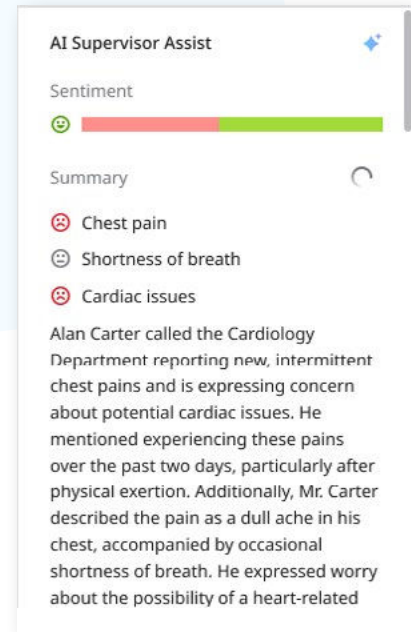
- Whisper or chat if the agent is fumbling through a policy or missing customer intent.
- Note strong explanations or effective objection handling for reuse in coaching.
- Use real-time search to scan multiple live calls for high-risk language or training moments.
- Post-call, clip and annotate transcript sections to provide specific, contextual feedback.
- Share well-handled segments where agents turned confusion into clarity or pushback into progress — these are strong peer coaching moments.





AI-POWERED CALL SUMMARIES

Mid-call summaries in AI Supervisor Assist give supervisors real-time insight into ongoing conversations without needing to join or monitor every call. These summaries highlight what's been discussed so far, keeping supervisors informed of key developments as they happen. In addition to the running summary, the system automatically tags the call with relevant topics—such as billing, cancellations, or technical issues—and attaches sentiment to each, so supervisors can quickly assess the tone and nature of the conversation. This enables more proactive support, faster intervention when needed, and a clearer picture of what's driving customer interactions across the team.



WHAT TO LOOK FOR:

- Besides getting immediate context of the conversation, look at the associated topics and whether sentiment is clustered around one topic (e.g., all red under “billing”) or spread across multiple topics.

WHAT IT MEANS:

- If only one topic is negative and others are neutral or positive, the agent may be doing a good job isolating and de-escalating that issue — a strong coaching example.
- If all or most topics are negative, the call likely reflects broader dissatisfaction — possibly tied to agent performance, tone, or multiple breakdowns in process.

HOW TO ACT ON IT:

- Prioritize calls with multiple negative topics for live monitoring or post-call coaching.
- Share calls where agents contain and turn around a negative topic while maintaining a positive tone on others — these are powerful best-practice moments.
- Use topic-level sentiment to guide coaching — you’ll know exactly what the issue was and how it was handled.



CHAT, WHISPER, BARGE (LIVE AGENT GUIDANCE TOOLS)

With AI Supervisor Assist, supervisors have multiple tools to support agents in real time. Monitor lets them listen in on active calls without the customer knowing, while Whisper allows the supervisor to coach the agent privately during the call. If needed, they can Barge into the conversation to speak with both parties directly. For added flexibility, supervisors can also send private messages to agents using integrated chat through our UC platform—ideal for quick guidance without disrupting the flow of the call. Together, these features help supervisors stay connected, provide timely support, and maintain quality across customer interactions.

The screenshot displays a call center interface. At the top, a call header shows the agent's name 'Gdelivery & Thomas Schmitt' and 'Technical support' with a duration of '00:12'. A 'Remove agent' button is visible on the right. Below the header, a 'Queues' section displays various metrics: 'Customers waiting: 17', 'Max customers: Support cases: 5', 'Longest wait time: Sales: New York: 13:01', and 'Service level: 100%'. A table lists queues with columns for 'Queues', 'Type', 'Waiting', 'Exceeding', 'Wait time', 'Callbacks', 'Agents', and 'Available'. The table data is as follows:

Queues	Type	Waiting	Exceeding	Wait time	Callbacks	Agents	Available
Total (24)		16	5		1		
Sales: New York	Chat	4	1	13:01	-	11	-
Support cases	Chat	5	1	12:44	-	11	-
Tech Support	Voice (in)	2	1	7:29	1	6	-
Customer service	Voice (in)	2	2	1:54	-	6	-
Sales	Chat	1	-	0:34	-	4	-
Main office	Email	1	-	0:16	-	5	-

On the right side, a 'Sales: New York (12)' panel shows a list of agents with their names, status, and time. The agents listed are: Thomas Shimmer (Busy wrap up, 4:12), Jason Bourne (Busy wrap up, 2:45), Lana Moor (Busy wrap up, 1:56), Rosalind Fr... (Busy on break, 32:24), and Lars Timon (Busy on call, 2:45). A 'Join as agent' button is also present.

An inset window on the left shows a call in progress with the agent's name 'Lars Timon' and 'Busy on call' with a duration of '00:58'. Below the call information, there are two buttons: 'Monitor' and 'More', both highlighted with an orange box. An orange line connects the 'More' button to the call header area in the main interface.

WHAT TO LOOK FOR:

- Calls where the agent pauses frequently, uses vague phrasing, or seems unsure.
- Repeated customer questions or statements such as “I don’t understand,” “you’re not hearing me,” or “this is frustrating”.
- Missed escalation cues or non-responses to sentiment drops.
- Agents clearly handling difficult calls well — not just the ones who are struggling.



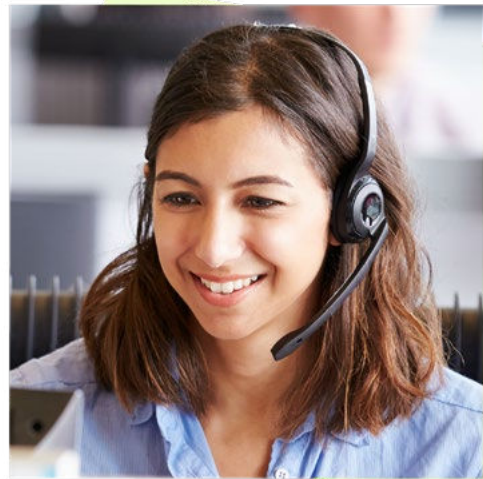
CHAT, WHISPER, BARGE CONT. (LIVE AGENT GUIDANCE TOOLS)

WHAT IT MEANS:

- Pauses and filler language often point to uncertainty, especially with new or less confident agents.
- Customer repetition or tone shifts suggest the agent may need help clarifying policy, defusing tension, or regaining control.
- Whisper and chat allow you to course-correct in real time, but how and when you use them affects agent confidence.
- Providing mid-call support for strong performance (e.g., a well-handled objection or clear explanation) reinforces good habits, not just fixes problems.

HOW TO ACT ON IT:

- Use Whisper for quick, in-the-moment corrections or reminders when tone or confidence wavers.
- Use UC Chat when agents need links, more detailed phrasing, or reference info they can read and use live.
- Avoid overusing either — micromanagement mid-call erodes agent trust.
- Highlight positive use cases, too: whispering “Great explanation — stay with that” or following up via chat with “That was a perfect way to frame it” reinforces the right behaviors.
- After the call, review which interventions had a positive effect — especially if sentiment improved or the call resolved successfully.





POST-CALL EVALUATION & COACHING (AI AGENT EVALUATOR)

AI Agent Evaluator gives supervisors the flexibility to review and score calls more efficiently—whether automatically assigned based on predefined keywords or manually selected for closer inspection. Supervisors or admins can configure rules to flag a percentage of calls that mention specific terms or phrases, ensuring priority conversations are reviewed. Each evaluation includes a full transcription with sentiment tagged per statement, keyword highlights aligned with business goals, and a breakdown of evolving sentiment from the agent, customer, and overall. To support coaching and performance tracking, it also presents key metrics like talk-to-listen ratio and words per minute. This gives supervisors a clearer, more consistent view of agent performance—without the need to comb through every recording.

EVALUATIONS: SUPERVISOR VIEW

Search for specific evaluations

Interaction Date

Evaluator Name

Easy filter dropdown menus

Create External Evaluation Button
Evaluate an employee based on activity done outside of the Contact

List of agents being evaluated

Agent	Type	Date	Sen.	Evaluator	Template	Status	Collaboration	ACK.
Niklas Sundin	in	Apr 20, 2020	🟢	Massimiliano Cavaleri	Trainee probation	PASSED		
Maria Hantzis	out	Apr 20, 2020	🟡	Steve DiGiorgio	Trainee probation	PASSED	Finished	
Ingrid Thulin	in	Apr 20, 2020	🟡	Lars Ulrich	Trainee probation	FAILED	Finished	
Lawrence Cardine	in	Apr 20, 2020	🔴	Massimiliano Cavaleri	Company ethics and p...	FAILED	Finished	
Jordyn Vetross	in	Apr 20, 2020	🔴	Massimiliano Cavaleri	Company ethics and p...	FAILED	Disabled	
Geoff Tate	out	Apr 19, 2020	🟢	Bernard Lowe	Trainee probation	PASSED	Disabled	
Cindy Volk	in	Apr 19, 2020	🟡	Steve DiGiorgio	Company ethics an...	IN PROGRESS		
Marshall Hendrix	out	Apr 19, 2020	🟡	Steve DiGiorgio	Probation	PASSED		
Nicole Howell	out	Apr 19, 2020	🔴	Steve DiGiorgio	Monthly performance...	FAILED	Disabled	
Marilyn Novak	in	Apr 19, 2020	🟡	Steve DiGiorgio	Trainee probation	IN PROGRESS	Waiting for agent	
Simone Simons	out	Apr 19, 2020	🟡	Jessica Macomber	Trainee probation	IN PROGRESS	Agent responded	
Scott Kline	out	Apr 18, 2020	🟢	Steve DiGiorgio	Trainee probation	PASSED	Finished	
Isabella Picasso	in	Apr 18, 2020	🔴	Massimiliano Cavaleri	Company ethics and p...	AUTOFAILED	Finished	
Taylor Morsmen	out	Apr 18, 2020	🟡	Massimiliano Cavaleri	Trainee probation	PASSED	Finished	
Sarah Brightman	in	Apr 18, 2020	🟡	Alexander Cooke	Trainee probation	PASSED	Finished	
Bruce Bailey	in	Apr 18, 2020	🟡	Stephen Harris	Trainee probation	PASSED	Finished	

Additional Evaluation information

Collaboration
See the status of evaluation results sent to a frontline user to review

Type of Evaluation
Distinguish between Inbound/ Outbound Interactions or External Evaluations

Sentiment Analysis powered by Interaction Analytics and Artificial Intelligence (AI)
Save time and quickly identify and evaluate the conversations that matter most to your supervisors and admins based on sentiment scores of recorded interactions or transcribed conversations

Template Type
Create, duplicate an evaluation template of your choosing

Evaluation Status
Know instantly whether a frontline user's evaluation passed, failed, or is in progress

Acknowledgment
Track whether frontline users have reviewed the evaluation feedback and either agree or disagree with the final evaluation results



POST-CALL EVALUATION & COACHING (AI AGENT EVALUATOR)

GRADING TEMPLATES

Grading Templates are predefined sets of criteria used to evaluate agent performance. These templates can be customized to fit the specific needs of the contact center.

Collaborate to stay on the same page

Collaboration involves both the evaluator and the agent under evaluation. This process allows multiple evaluators and a single agent to communicate through comments on any or all the evaluation questions.

Evaluations to Improve Customer Service Levels

Customized Evaluation Templates:

Create new forms, clone forms, and set up multiple forms. Types of questions consist of Yes/No questions, multiple choice, and rating systems.

The screenshot displays the 'Evaluation for Nicole Howell' interface. On the left, a 'Form template' titled 'Monthly performance review' is shown with a list of 10 questions. Question 1 is highlighted: '1. If the call was transferred did the agent adapt the greeting accordingly?'. Below the question are radio buttons for 'Yes' and 'No', and a 'Comments' section with a text input field. On the right, a 'Transcription' panel shows a list of call segments with timestamps and status indicators (green for correct, red for error). One segment is highlighted with a red error icon: 'C My agents can't log in to the system. There is some kind of error'. The interface also includes a 'Back to evaluations' button, a 'Score: 0' indicator, and a 'Go next' button at the bottom.



POST-CALL EVALUATION & COACHING (AI AGENT EVALUATOR)

INTERACTION ANALYTICS

Evolving Sentiment Analysis

Tracks sentiment changes for both the agent and customer throughout the interaction. Categories include Overall, Agent, and Customer sentiment.

This feature is invaluable for supervisors, enabling them to better understand conversation sentiment, identify coaching opportunities, and highlight best practices.

In this scenario:

Overall Sentiment:
Tends toward neutrality

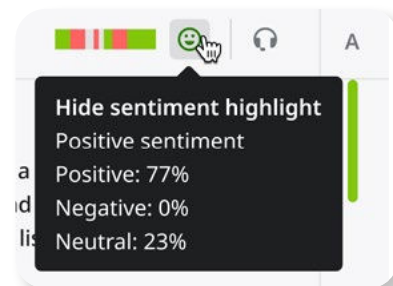
Agent Sentiment:
Remains consistently positive

Customer Sentiment:
Initially expresses dissatisfaction but later transitions to a positive



Overall Sentiment Analysis

Provides a summary of the emotional tone of a conversation, categorizing it as positive, negative, or neutral. Supervisors can view a percentage breakdown by hovering over the icon.



Agent Performance:

Headset Icon: provides a quick snapshot of key agent performance metrics.

Talk/Listen Ratio: Measures the balance between an agent's speaking time and active listening during interactions, presented as percentages like 54/46. It helps supervisors assess engagement levels for both inbound and outbound calls.

Words per Minute (WPM): Indicates an agent's speaking speed, crucial for ensuring customer understanding and maintaining optimal call handle time.

Keywords Finder

Enables supervisors to monitor specific keywords. For instance, by inputting the keyword "Error," the AI Agent Evaluator can pinpoint transcriptions that contain this term. Clicking on a keyword displays all instances within the transcript, allowing for an in-depth review of the context and results of these interactions.

Assigned on Apr 20, 2022 by Monthly assesment rule

Transcription Information

Summary

Help Technical problem Product work

During the call the customer had an issue related to a product or service they had purchased. The agent introduced themselves and confirmed the customer's identity for security purposes. They then listened to the ...

Show more

3 keywords found

Technician Error Name

A Good afternoon! Thank you for calling Acme Network. How can I help you? 00:01

C Yeah, hi. My system is down and I need a technician. 00:07

A Oh, okay, I see. Let me gather some information and see how we can help. What is your first name? 00:10

C Alexander 00:16

A And your last name? 00:18

C Smith 00:21

A Okay, And your company name? 00:25

Add annotation 00:00 | 01:20

WHAT TO LOOK FOR:

- Calls that were auto-assigned based on keyword presence (e.g., “cancel,” “escalate,” “refund”).
- Agents who consistently underperform on specific scorecard categories, such as soft skills, resolution confidence, or policy adherence.
- Speech patterns like talk speed that regularly exceeds ~160 words per minute (above the recommended 140–160 WPM for conversational clarity).
- Talk vs. listen ratios skewed heavily toward the agent — such as 80/20, where effective conversations are typically closer to 60/40 or even 50/50 depending on the call type.

WHAT IT MEANS:

- Keyword-based assignment helps you surface high-risk or high-interest calls across the team without reviewing everything manually.
- Repeated misses on certain evaluation categories often point to a coaching opportunity tied to confidence, product understanding, or soft skills.
- Faster-than-average talk speed may indicate rushing, nervousness, or a lack of confidence.
- A lopsided talk ratio suggests the agent may be dominating the call or missing cues to listen and clarify, especially problematic in support and consultative sales roles.

HOW TO ACT ON IT:

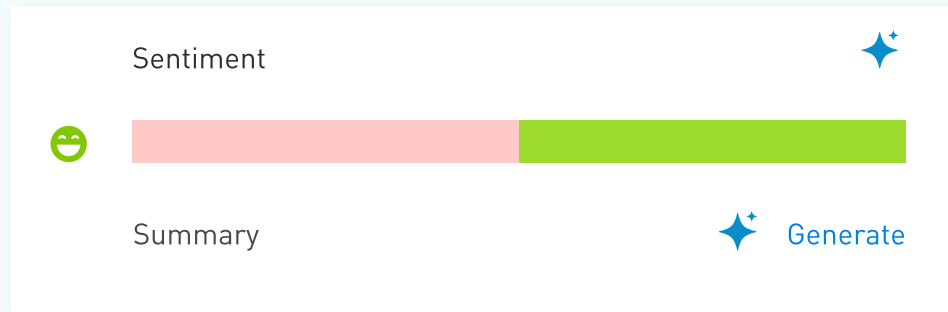
- Focus coaching on recurring evaluation issues that align with your team’s goals (e.g., clarity, tone, or resolution skills).
- Use calls with keyword-based assignment to deliver targeted, relevant coaching, especially when paired with real-time observations.
- Address talk speed and ratio trends during 1:1s — these are easy to adjust and can drive immediate improvement in customer understanding and satisfaction.
- Add timestamped annotations to the transcript so agents can see exactly where the behavior occurred — this grounds feedback in context and makes it easier to act on.
- Track these metrics over time to show progress, set expectations, and reinforce behavior changes that stick.

BEST PRACTICES: THINGS TO KEEP IN MIND:

Do's

1. **DO:** Proactively monitor real-time sentiment cues to identify at-risk customer interactions and provide timely agent support.
2. **DO:** Use direct agent communication tools (UC chat/whisper) to provide immediate and effective coaching during live calls.
3. **DO:** Validate AI-generated information with your own expertise to ensure accuracy, especially in complex situations.
4. **DO:** Analyze real-time queue data to make informed decisions about staffing and resource allocation.
5. **DO:** Provide constructive feedback to agents based on AI insights, focusing on skill development.

Ai Supervisor Assist



Dont's

1. **DON'T:** Rely solely on AI sentiment analysis without considering the broader context of the conversation.
2. **DON'T:** Micromanage agents; instead, use AI insights to provide helpful guidance and support their development.
3. **DON'T:** Ignore direct communication from agents who may be requesting assistance.
4. **DON'T:** Assume AI-generated summaries are always 100% accurate; always use your judgment.
5. **DON'T:** Use live monitoring in a way that undermines agent trust; focus on ethical and constructive use.



Tip: *AI Supervisor Assist is here to support you in making every supervisor your best supervisor, leading to a more efficient, effective, and customer-centric contact center.*

QUESTIONS? CONTACT US TODAY!

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