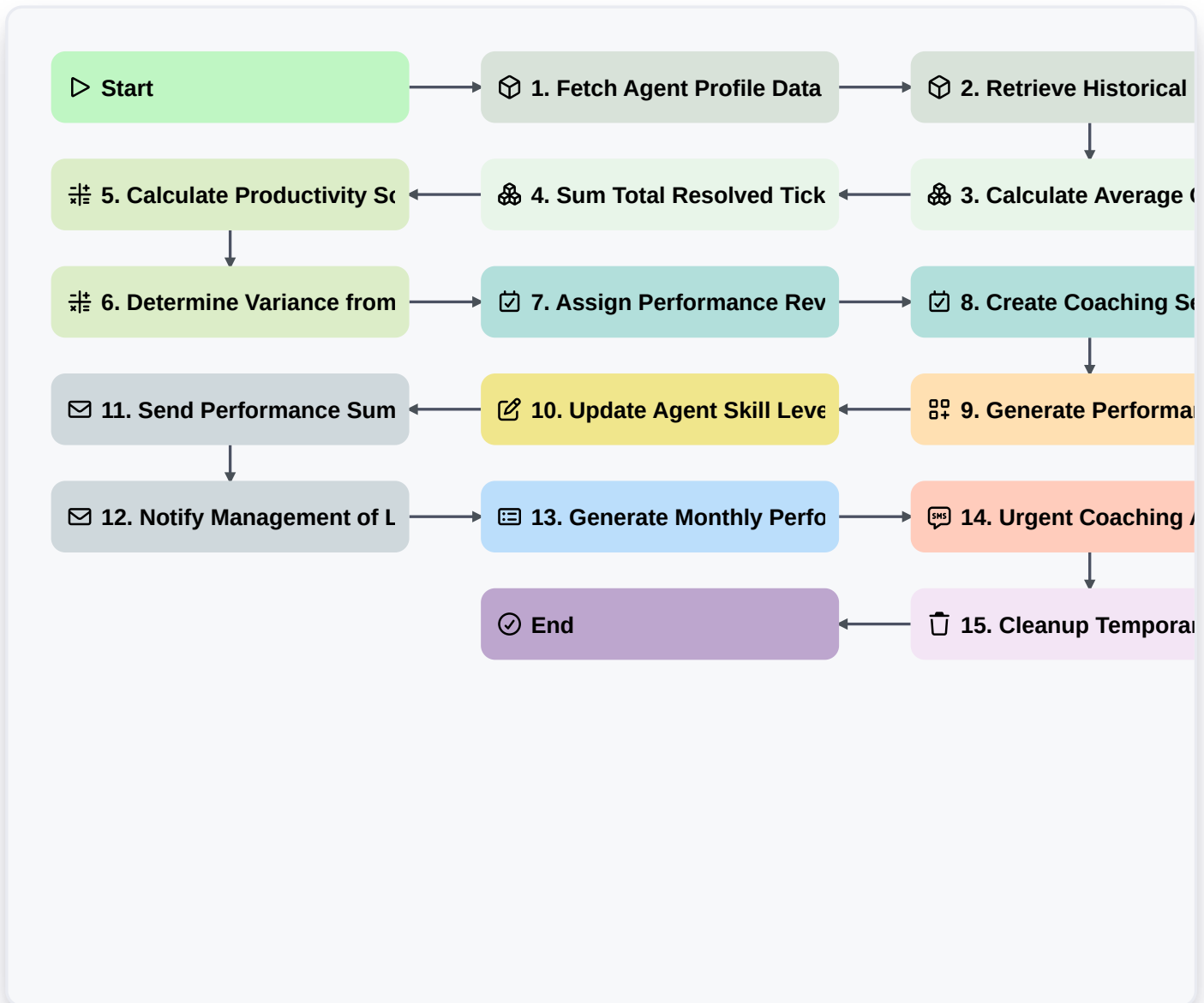


# Agent Performance Tracking Workflow



## Start

Start of the Workflow/Process.

## 1. Fetch Agent Profile Data

Retrieve agent details, including name, role, and assigned team from the Agent Data Model.

## 2. Retrieve Historical Performance Logs

Fetch all completed task entries and performance metrics for the specific agent for the current month.

## 3. Calculate Average Quality Score

Calculate the average of all 'Quality Audit' scores from the recent performance entries.

## 4. Sum Total Resolved Tickets

Aggregate the count of all 'Resolved' status entries linked to the agent's ID.

## 5. Calculate Productivity Score

Execute a formula:  $(\text{Total Resolved Tickets} * 0.6) + (\text{Average Quality Score} * 0.4)$  to derive a weighted performance index.

## 6. Determine Variance from KPI

Calculate the difference between the calculated Productivity Score and the predefined Team KPI target.



### **7. Assign Performance Review Task**

Create a task for the Team Lead to review the calculated metrics and provide qualitative feedback.

### **8. Create Coaching Session Task**

If the Productivity Score is below threshold, create a task for the Supervisor to schedule a 1-on-1 coaching session.

### **9. Generate Performance Record**

Create a new entry in the 'Monthly Performance Summary' data model containing the aggregated metrics and calculated score.

### **10. Update Agent Skill Level**

Update the 'Skill Level' field in the Agent Data Model based on the new performance results.

### **11. Send Performance Summary to Agent**

Send an automated email to the agent's email address containing their monthly highlights and score.

### **12. Notify Management of Low Performance**

Send an alert email to the Department Head if the performance variance is negative.

### **13. Generate Monthly Performance PDF**

Generate a formal report from the performance task data for archival and monthly review meetings.

### **14. Urgent Coaching Alert**

Send an SMS notification to the Supervisor if an urgent coaching task is created due to critical KPI drops.

### **15. Cleanup Temporary Calculation Logs**

Delete the temporary raw calculation entries used during the aggregation process to maintain data cleanliness.

### **End**

End of the Workflow/Process.