GENESYS®

AN ALCATEL-LUCENT COMPANY

Frontline Advisor™

Manager User Manual Release 3.3

Genesys Performance Management Advisor™

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Contents

Overview

Frontline Advisor™ improves both agent performance and customer satisfaction by giving supervisors and managers a real-time view of agent activity. Customizable alerts draw immediate attention to agents who need coaching and enable supervisors to more effectively manage results.

The real-time data enables supervisors to correct problems and reinforce progress as it happens, not after the break or during the next shift. Frontline Advisor puts everything supervisors and managers need to pay attention to in a single location, so they can capture the priority issues and quickly direct their attention to the agents who need coaching.

Current status, performance, behavioral- or activity-based data can be presented in customized views. Sophisticated, configurable business rules monitor key performance indicators and then notify supervisors of situations requiring immediate attention.

The alert activity in Frontline Advisor makes agent activity trends more obvious, without requiring supervisors to be screen-watchers. It increases efficiency so supervisors have more time to spend with their agents.

Frontline Advisor is designed to help supervisors and managers raise the performance of agents, allowing them to instantly identify activities that need correction or additional training, as well as areas where agents are performing optimally.

Manager Console

The Manager Console (Figure 1) is divided into four views:

- **Monitoring Hierarchy view**: displays the nodes of your monitoring hierarchy together with the data grid representing rollups at each level
- **Teams view**: the agents' overall status activity in real time
- **Agent Alerts view**: the details of the alerts for a selected agent
- **Team Alerts view**: the details of the alerts for all agents on the selected team

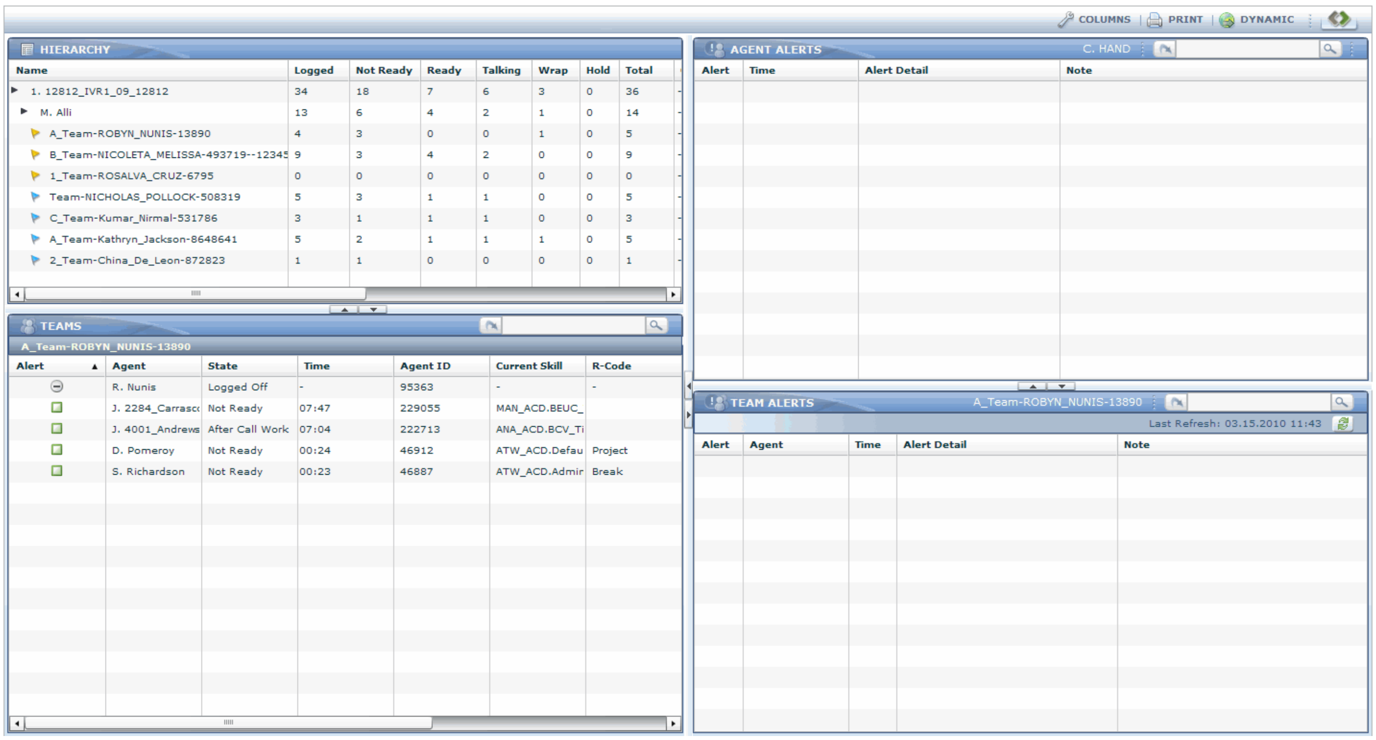


Figure 1: *Frontline Advisor*

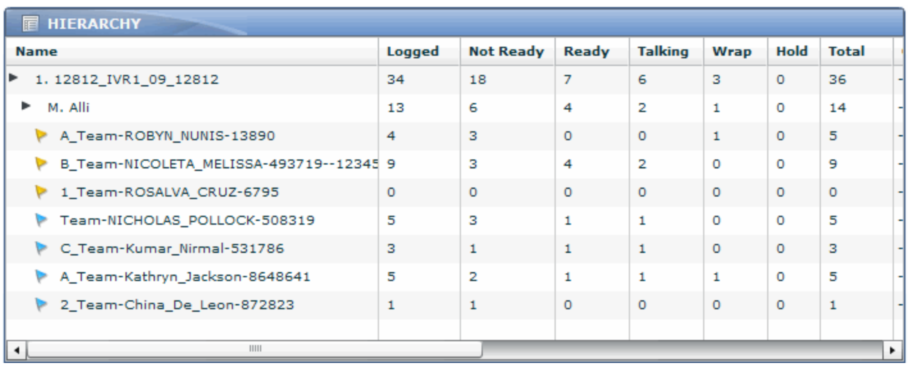
Monitoring Hierarchy

The Monitoring Hierarchy (Figure 2) contains the groups and monitors in your monitoring hierarchy, that is, the managers, supervisors, and teams who report to you as indicated in your monitoring hierarchy, plus your direct manager. The Hierarchy view displays primary (yellow flag) and back up teams (blue flag). The metric values of backup teams do not contribute to the rolled-up metric values for backup supervisors. The primary teams display next to a yellow icon and the backup teams display next to a blue icon. Tooltips indicate the type of the team.

The count of uncleared alerts (that is, triggered rules) roll up through all levels of the monitoring hierarchy.

Selecting teams of agents to monitor

To monitor one or more teams of agents, select the immediate supervisor of the teams from the Hierarchy view. To monitor a particular team select the team from the Hierarchy view. To display primary and backup teams in the Teams view, select the immediate supervisor of the teams.


HIERARCHY

Name	Logged	Not Ready	Ready	Talking	Wrap	Hold	Total
1. 12812_IVR1_09_12812	34	18	7	6	3	0	36
M. Alli	13	6	4	2	1	0	14
A_Team-ROBYN_NUNIS-13890	4	3	0	0	1	0	5
B_Team-NICOLETA_MELISSA-493719--12345	9	3	4	2	0	0	9
1_Team-ROSALVA_CRUZ-6795	0	0	0	0	0	0	0
Team-NICHOLAS_POLLOCK-508319	5	3	1	1	0	0	5
C_Team-Kumar_Nirmal-531786	3	1	1	1	0	0	3
A_Team-Kathryn_Jackson-8648641	5	2	1	1	1	0	5
2_Team-China_De_Leon-872823	1	1	0	0	0	0	1

Figure 2: Hierarchy

How Frontline Advisor monitors agents

Thresholds and rules are defined in the Administration Console by users with the admin role. Thresholds define the critical, warning, and acceptable conditions for each metric. Thresholds and rules can be used to find positive behavior as well.

In addition to performance information, Informiam Frontline Advisor tracks and records all exceptions and allows supervisors to enter notes and coaching information to support positive and negative feedback. Supervisors describe their actions for dealing with the alert in a note. The note becomes part of the recorded history of the agent.

Depending on the metric, a value may be acceptable above or below a certain value. Some thresholds trigger an alert if the value is below or above defined values. In general, if a metric value is:

greater than	the value in the 4th text box			then the value is critical high (red).
greater than	the value in the 3rd text box	and less than or equal to	the value in the 4th text box	then the value is warning high (yellow).
greater than or equal to	the value in the 2nd text box	and less than or equal to	the value in the 3rd text box	then the value is accept-able (green).
greater than or equal to	the value in the 1st text box	and less than	the value in the 2nd text box	then the value is warning low (yellow).
less than	the value in the 1st text box			then the value is critical low (red).

The four text boxes are colored to provide a visual cue for the status (Figure 3). Red indicates a critical value range. Yellow indicates a warning value range. Green indicates an acceptable value range.

Figure 3: Threshold bar

Here are three examples. The system setting for how often the metrics are calculated (that is, the performance calculation interval) is 10 minutes for the purposes of these examples. For an average of 3-minute calls, handling 2 or more calls but less than or equal to 5 calls is green. Handling 1 call but less than 2 calls (that is, two five-minute phone calls) is yellow. Handling less than 1 call is red. Handling more than 5 calls but less than or equal to 8 calls (that is, the calls are too short) is yellow. And handling more than 8 calls (that is, short-calling) is red (Figure 4).

Figure 4: Threshold is acceptable between two values

In the example in Figure 5, handling 2 or more calls but less than or equal to 5 calls is normal (green). Handling 1 call triggers a warning (yellow). Handling less than 1 call or more than 5 calls is a critical (red).

Figure 5: Threshold without a high yellow warning

In the example in Figure 6, handling 1 or more calls but less than or equal to 5 calls is normal (green). Handling more than 5 calls but less than or equal to to 8 calls triggers a warning (yellow). Handling less than 1 call or more than 8 calls is a critical (red).

Figure 6: Threshold without a low yellow warning

Rules are conditions that continuously monitor the agents' statistics. For example, an agent has more than 10 agent calls transferred in the past 10 minutes. If the status is within a critical or warning range, an alert is triggered. Alerts help to focus your attention on the most important issues effecting your agents' performance and behavior. Rules also count events throughout an interval of time, which allows them to trigger on the frequency of events. The frequency of an alert is a leading indicator of good or bad trends. It is good practice to learn to make use of alerts to quickly focus on where to take action now.

A threshold compares a measured value at a point in time to a threshold range to determine the status. Rules evaluate and trigger on agent metrics, but not for team metrics.

The thresholds and rules should be aimed at highlighting significant situations and be very purposeful. Ideally, the number of alerts should be low: one or two per agent per day would lead to very effective coaching. Rules could monitor only one or two types of situations a week. The rules could be changed to tighten the triggering numbers in a future week (to "raise the bar") or, once good performance is achieved, new rules could be defined to move to new areas of performance. See also, "Appendix A: Tailoring a Coaching Strategy" on page 18.

The five types of thresholds and rules are:

Class	Explanation	Action
Threshold	Based on a count	change text red or yellow
Threshold	Based on an average or maximum time value	change text red or yellow
Threshold	Based on the duration of an agent's state	change text red or yellow
Rule	Based on the frequency of calls held or calls transferred	issue a red alert
Rule	Based on the frequency of (long or short) call durations or wrap times	issue a red alert

Figure 7: The five types, how they trigger, and what actions they perform

Teams

The Teams view (Figure 8) is where you can focus on an agent's overall status in real time. Primary teams display before the backup teams.

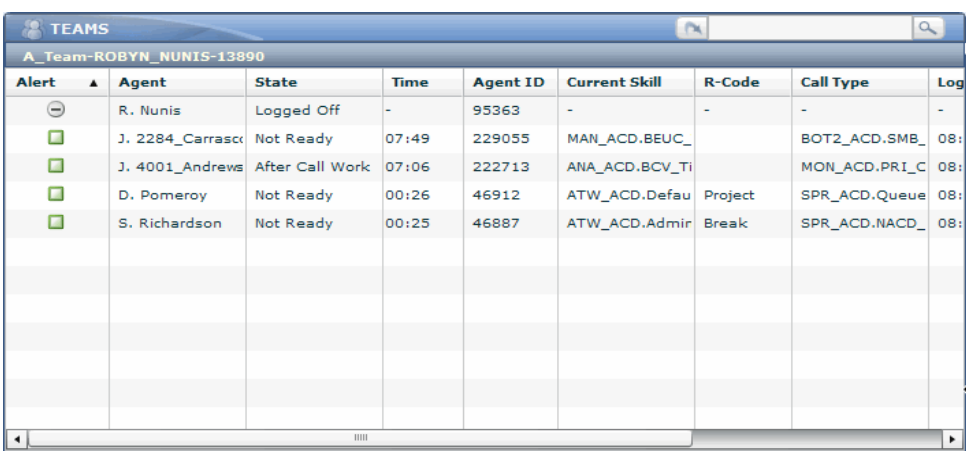
A team bar displays for each team being monitored and contains the team name. Within each team, a row for each agent displays including logged off agents. The information is updated and refreshed by default every 10 seconds for the state data and every 10 minutes for the performance data. The refresh rate is configured in the Administration module. Some default columns include:

- **Alert**: the agent's current alert state is indicated by a colored icon:

  Red indicates at least one critical alert.

  Green indicates that no alerts are active: the value is normal.

  In addition, a gray icon indicates the agent is not logged into the ACD.
- **Agent**: first initial and last name
- **Agent ID**: the agent's identification
- **Current Skill**
- **Call Type**
- **Log-In**: the time the agent logged in
- **R-code**: reason code
- **State**: the agent's current state, including logged on, logged out, not ready, ready, talking, work not ready, work ready, busy other, reserved, unknown, hold, active, paused, and not active.
- **Time**: the amount of time that the agent has been in the current state (minutes:seconds)


TEAMS

A_Team-ROBYN_NUNIS-13890

Alert	Agent	State	Time	Agent ID	Current Skill	R-Code	Call Type	Log
	R. Nunis	Logged Off	-	95363	-	-	-	-
	J. 2284_Carrasc	Not Ready	07:49	229055	MAN_ACD.BEUC_		BOT2_ACD.SMB_	08:
	J. 4001_Andrews	After Call Work	07:06	222713	ANA_ACD.BCV_Ti		MON_ACD.PRI_C	08:
	D. Pomeroy	Not Ready	00:26	46912	ATW_ACD.Defau	Project	SPR_ACD.Queue	08:
	S. Richardson	Not Ready	00:25	46887	ATW_ACD.Admir	Break	SPR_ACD.NACD_	08:

Figure 8: Teams view

Agent Alerts

The details of the alerts for an agent display in the Agent Alerts view (Figure 9). Display the alerts for an agent by selecting an agent in the Teams view. The agent's name displays beside the Agent Alerts view. The alerts are for a moving window of the past 24 hours. All the alerts triggered for an agent in the past 24 hours display in the Agent Alerts pane and default to reverse chronological order.

The details of the Agent Alerts view include:

- **Alert**: the alert's status (red). Values do not update in the Agent Alerts view until the agent logs in.
- **Time**: the time when the alert was triggered on the current day (hh:mm:ss)
- **Alert Detail**: the rule description
- **Note**: an inline editing field where a supervisor provides a note for the alert

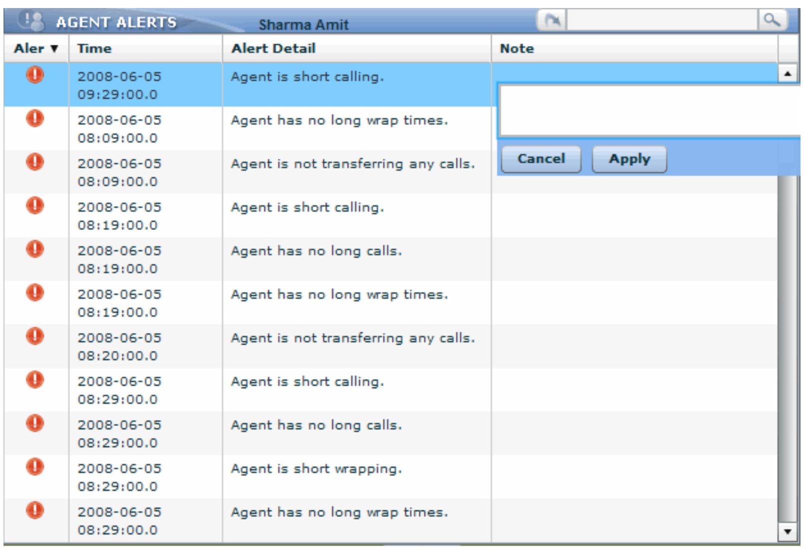


Figure 9: Agent Alerts

Clearing alerts

You can clear one or more alerts quickly and easily by applying notes on each alert. Once cleared, the note can be viewed in the Team Alerts view and becomes part of the agent's performance history. The note will be visible in both Frontline Advisor and Agent Advisor. Uncleared alerts older than 24 hours are moved to an archive. This is a moving window of 24 hours. Although alerts older than a day do not display in the Agent Alerts and Team Alerts views, those alerts and notes remain in the database.

Clear an alert by clicking in the Notes field, typing text, and clicking Apply. You cannot modify a note once it is saved. You can only type one comment per alert. The alert icon is replaced by a green icon and the status is cleared.

Deleting the text or navigating away from the note without clicking Apply will not clear the alert.

Note: If another supervisor saves a note as you are typing yours, a message indicates the conflict (Figure 10).

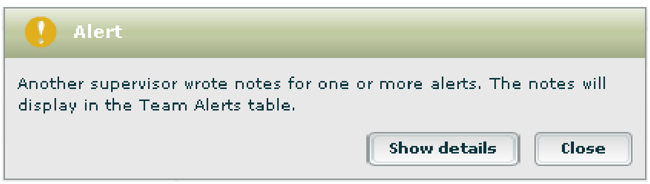


Figure 10: Notes conflict message

To see which notes were pre-empted, click Show Details. You can view the note in the Team Alerts view (Figure 11).

Figure 11: Notes conflict details

Team Alerts

The details of alerts for all agents on the selected team display in the Team Alerts view (Figure 12). The team's name displays beside the Team Alerts tab. The alerts are those generated in the past 24 hours from the current time and default to reverse chronological order. You cannot view alerts beyond the past 24 hours; however, they are stored in the database for the ability to do alert reporting in a future release.

The details of the Team Alerts view include:

- **Alert**: the agent's alert state is indicated by red for an alert or green for a cleared alert.
- **Agent**: first initial and last name of the agent triggering the alert Agents display if they have had any alerts in the past 24 hours.
- **Time**: the time when the alert was triggered on the current day (hh:mm:ss)
- **Alert Detail**: explanatory text describing what situation triggered the alert
- **Note**: the text a supervisor provides for the alert

Update the list by clicking the Refresh ( ) icon. The date and time of the last refresh display next to the Refresh icon.

Note: Agents display in the Alert log if they have had any alerts since 12:00:00 a.m..

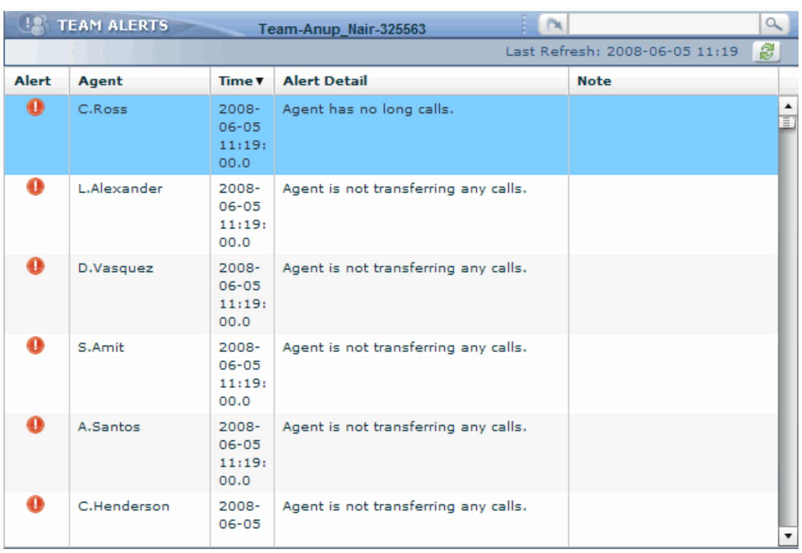


Figure 12: Team Alerts view

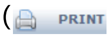
Printing your current view

You can print the information currently displayed and out of view in a formatted report. The printout goes to any printer that is configured for the computer on which the Frontline Advisor is running. Details of the printout include:

- date and time stamp
- alert status: in color and by shape
- team name receiving the alert
- agent state
- time the alert was issued
- page numbers

The details of the printout do not include the values in columns that are not enabled.

To print your current view:

1. Click the Print (

) icon.
The Print dialog displays.
2. Configure the printer.
3. Click Print to confirm.
The document is sent to the printer.

Opening a defined URL

You can open a Web site that your administrator defined by clicking the Link Out (

) icon.

User Status icon

You can display the User Status icon () to monitor the status of alerts while Frontline Advisor runs in the background. When an alert is triggered, the primary color of the icon changes to red. You may want to keep the User Status icon on your desktop for the first part of the day, then if/when it changes color, open Frontline Advisor (Figure 1) to see the details.

Customizing the Display

Choosing metric columns

You can select which of the optional state and performance metrics display in the Hierarchy and Team views.

The state metrics include: Alert, Agent, State, Time, Agent ID, Current Skill, R-Code (that is, Reason Code), Call Type, and Log-In (that is, Logged in Time). The team performance metrics include: Calls Handled, Average Handle Time, Average Talk Time, Average Wrap Time, Calls Transferred, Longest Call, and Longest Wrap. The hierarchy metrics include: Calls, LngCall, AHT, Xfer, AvgWrap, AvgTalk, LngWrap, Logged, Not Ready, Ready, Talking, Wrap, Hold, Total.

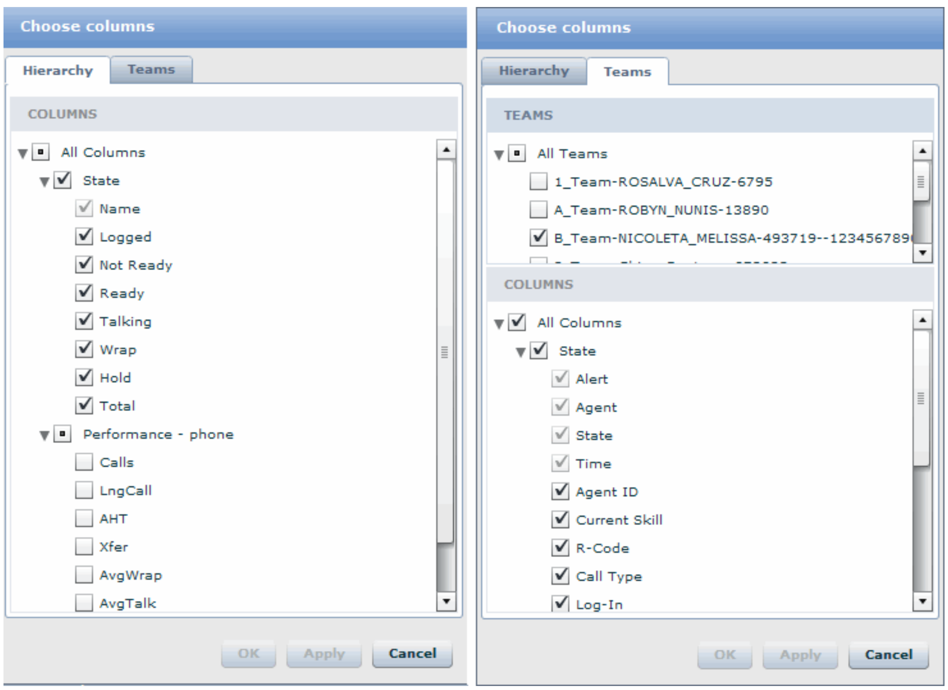
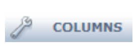


Figure 13: Column Configurator

To select the columns:

1. Click  .

   The Choose Columns dialog opens.
2. For the selected columns to display for all teams, on the Teams tab, select the All Teams check box or
   for the selected columns to display for a specific team, clear the All Teams check box and select the specific team.
3. Select check boxes.
   Include all agent states or performance metrics by selecting the State or Performance check box. Exclude agent states or performance metrics by clearing check boxes or

exclude all agent states or performance metrics by clearing the State or Performance check box.

4. Select the Hierarchy tab to select hierarchy metrics.
   Include all hierarchy metrics by selecting the All Columns check box. Exclude agent states or performance metrics by clearing check boxes or exclude all agent states or performance metrics by clearing the State or Performance check box.
5. Click Apply. The selected columns display in the view.
   To close the Column Chooser without changing the columns, click Cancel.

Ordering the metrics

You can change the order the metrics display by dragging a column heading to another location in the view. The default columns always display to the left of the optional columns. You cannot hide the default columns.

Sorting the views

You can sort a view by clicking a column heading. You can sort the view in ascending or descending order. Sorting by the Alerts column is a great way to see all red alerts first. A sort triangle indicates the direction. The sorting persists if you select another team.

Adjusting the width of columns

If one or more columns are selected to, or removed from, display, the width of the columns adjusts accordingly. There is a minimal default width. Adjust the width of individual columns, by dragging the pointer when it changes to a near the column break.

Resizing the views

You can resize the height of each view by dragging the splitter up or down, or side to side.

Searching

You can search for:

- supervisor and agent names in the Teams view
- alert details and notes in the Agent Alerts view
- agent name, alert details, and notes in the Team Alerts view

To search type text in the Search field and click . Searching finds the next occurance of the search text from the current cursor location and highlights it. The hierarchy is expanded if necessary.

To find the next occurence, click again. Search continues from the current location and wraps around the end to the beginning.

To clear the Search field, click .

Persistant settings

Logging out and in (to any machine) or returning from another module in the Informiam Browser retains the:

- column selection
- row expansions
- location of the splitters
- selected team bar
- selected agent
- team performance or team statistics
- last selected supervisor in the Hierarchy view

Informiam Browser

Logging in

You can launch the Informiam Browser using the Windows start up menu or by using the shortcuts located on the desktop or the task panel.

Authentication is tied to the monitoring hierarchy imported from the source tables. Any supervisor or manager defined in the monitoring hierarchy has log in permission for Frontline Advisor. Informiam Frontline Advisor stores the definition of which agents belong to which teams, and which supervisors coach which teams. Only one primary supervisor exists for each team. Multiple backup supervisors may exist for each team. A person can be a primary and/or backup supervisor for any number of teams. You can only monitor the performance of the supervisors and teams you coach; you cannot see the performance of other teams.

To log in to the Informiam Browser:

1. Double click on the Informiam Browser icon.
   The Login page displays (Figure 14).
2. Type a user name (CUID) and password.
3. The host name is http://home.informiam.local by default; however, if the home.informiam.local server is not found while the Login page loads, you must type your server in the Host Name field. The host name is configured by the installer. If it is incorrect, see your system administrator. The new host name will become the default server for subsequent log ins.
4. To save the user name and password on your local machine, select the Remember Me on this Computer check box.
   If selected, the user name and password will pre-populate when you start the Informiam Browser.
5. Click the Log In button.
   The Informiam Browser displays with the module tabs to which you have access.

   Once logged in, you can display other modules in other windows by clicking the  button.

6.

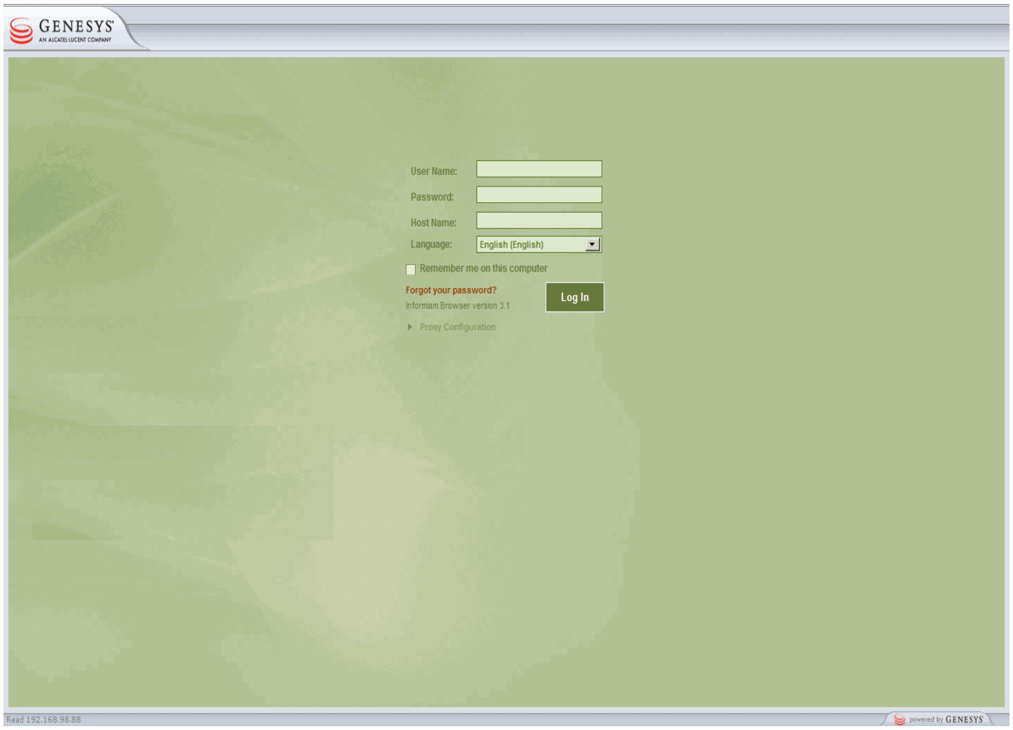


Figure 14: Login page

Navigation

Only the modules to which you have access display (Figure 15). The tab labels are configurable in the Contact Center Advisor Administration module on the System Configuration page.

Figure 15: Informiam Browser

Requesting a new password

To request a new password, if you forget yours:

1. On the Login page, click Forgot Your Password?
   A Forgot Password? page displays (Figure 16).
   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.
2. Type your user name (CUID).
3. Type your e-mail address.

4. Click Submit.
   A new password is sent to your e-mail address.

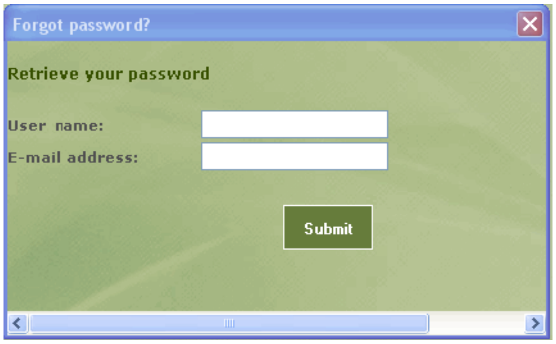


Figure 16: New Password page

Changing a password

You must be logged in to change your password.

To change your password:

1. Click the Change Password button.
   A Change Password page displays (Figure 17).
   Note: If your company uses LDAP, you must use your corporate tools to change your LDAP password.
2. Type your current password.
3. Type your new password.
4. To confirm, retype your new password.
5. To save, click Submit.

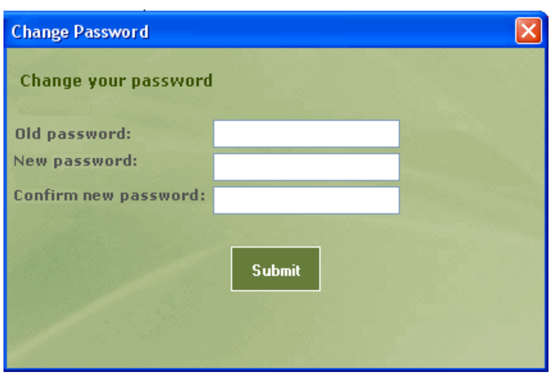


Figure 17: Change Password page

Accessing help

You can display the *Frontline Advisor Users Manual* in PDF form by clicking the Help button.

Logging out

You can log out of the Informiam Browser by clicking the Log Out button.

Appendix A: Tailoring a Coaching Strategy

You may want to use the concepts explained in this section to tailor a coaching strategy. A coaching strategy can be modified at any time. In general, coaching strategies will do the following steps:

1. Set values according to types of groups
2. Set values according to types of agents
3. “Raise the bar” over time for continuous improvement

Coaching Strategy Step 1

Consider our Acme Monitoring Hierarchy (in which the very first level under Enterprise, groups the organization into Sales and Service.

In a case like this, the coaching strategy will set sales-oriented values at the Sales node and service-oriented values at the Services node. For example, agents who are selling are most likely expected to talk longer than agents who are delivering customer service.

This Step 1 approach continues throughout the monitoring hiearchy, using inheritance when situations are similar, and using overrides when situations are different.

For example, under the Sales group is Consumer and Business. These two groups are similar in some ways because the agents are selling, but they are also different from each other because one group sells to consumers and the other group sells to businesses.

To further the Consumer and Business example, agents in both groups are selling and probably would be expected to perform the same number of holds and transfers. So the two groups would be set to inherit the hold and transfer thresholds from the Sales node. Wrap time for selling to consumers might take a shorter time than wrap time for businesses because the wrap for business buyers may include checking the balance in the business account. In this case, Consumer would be set with override values for Wrap Time different than the override values for Wrap Time in the Business group.

This Step 1 approach of setting values according to similarities and differences of groups continues all the way down the tree to the agents.

Coaching Strategy Step 2

The Acme Monitoring Hierarchy does not help much to explain Step 2. To explain Step 2, simply consider new agents versus veteran agents.

In any given group, some agents will be new and some will be veterans. Step 2 merely uses inheritance and override values at the agent level to coach differently according to agent type.

For example, newer agents might be expected to talk a little longer than veteran agents, until the newer agents learn better call control, company policies, computer applications, and so on. Veteran agents know these things, so a good coach will challenge them with tighter override values to help them continue to get a little better each day.

Therefore, Step 2 is the use of inheritance and overrides at the per-agent level, enabling coaching by agent type.

Note: Sometimes Step 2 occurs at a team level too. For example, sometimes a “nest” is used to incubate new agents, while a “tiger team” is used to leverage the expertise of long-time, veteran agents. Step 2 would use inheritance and override at the team level in these cases, where teams are groups of agent types.

Coaching Strategy Step 3

Step 3 is simply the modification over time of the other steps. Good coaches know that the best way to help people get better over time is to do it in smaller steps rather than large steps.

Therefore, Step 3 is about “raising the bar”, where coaches tighten or loosen values over time to continuously challenge agents and help them to always be improving their performance.

