

# Simplify and Improve Agent and Customer Engagement

## eLoyalty omnichannel solution

eLoyalty's omnichannel solution, powered by Upstream Works for Finesse, provides dynamic smart views, proactive task selection and simple context navigation to the single view desktop, increasing agent success while improving customer engagement.

### Key Features of Upstream Works for Finesse:

- Single, unified agent interaction activity workspace – view and manage all interactions
- Simplified task management – efficiently organize, prioritize and complete tasks
- Enhanced communication and management tools – great control and operational efficiency
- More detailed data capture – advanced business reporting needs
- Enhanced integrations – third-party CRM platforms and Cisco® v11.5

### Interaction Activity Workspace and Simplified Task Management

Intuitive, unified view of all interactions, tasks and queues enables agents to easily optimize every customer engagement.

Features	Descriptions	Benefits
Interaction Activity	Single, unified, comprehensive workspace with view of all agent interactions including: current contact context, my tasks, my queues, my day, search and interaction history  Agents are equipped with smart views, quick actions, and easy navigation of context all within an intuitive, convenient workspace	<ul style="list-style-type: none"> <li>✓ Agents can better view, manage and organize their tasks and queues</li> <li>✓ Supervisors can be more responsive and easily manage agents and tasks</li> <li>✓ Customers benefit from a responsive, insightful and personalized experience</li> </ul>
Current Contact Awareness	Easily view and manage all tasks in progress for current customer, including current digital tasks in queue and all tasks assigned to agents (voice and digital)	<ul style="list-style-type: none"> <li>✓ Agents are focused on all tasks in progress for current contact, seeing the complete customer journey</li> </ul>
Parked Task Management	Intuitive interface with single view and simplified management of all agent tasks including parked and suspended tasks	<ul style="list-style-type: none"> <li>✓ Agents are able to more effectively prioritize, manage and organize their work for faster resolution of issues</li> </ul>
Pick Personal Tasks	Allows agent to organize and pick personal digital tasks from queue	<ul style="list-style-type: none"> <li>✓ Agents can easily retrieve assigned tasks and better manage exchanges with individual customers</li> </ul>
Pick from Queue	Visual queue with a "cherry pick" feature; authorized agents can view and pick or reserve digital tasks in queue, based on skills	<ul style="list-style-type: none"> <li>✓ Agents can be proactive and service tasks in an order that maximizes efficiency</li> <li>✓ Supervisors can designate specific agents to meet particular needs</li> </ul>
Supervisor Assign Task to Agent	Supervisors can easily review all digital tasks in queue, reskill, delete, and assign/reassign tasks to/from agents, directly from the task queue	<ul style="list-style-type: none"> <li>✓ Supervisors can easily respond to requirements and manage task assignments on the fly</li> </ul>
Dynamic Reason Codes	Flexibility to present different reason code selections to agents based on task variables, such as skill or contact type  Capture more precise and granular data for comprehensive reporting on all skills	<ul style="list-style-type: none"> <li>✓ Agents can move more seamlessly between roles and skills for improved flexibility and efficiency</li> <li>✓ Agent activity is tracked more accurately and precisely to provide deeper insights and more comprehensive reporting</li> </ul>

## Omnichannel features and benefits

Features	Descriptions	Benefits
Preview Task Information and Media Content	<p>Agents can easily preview information captured in the contact and interaction panels, as well as all media associated with the task (transcripts, audio files, video files, documents, links to websites)</p> <p>Choice of quick view or detailed view for easy navigation through all media associated with a contact</p>	<ul style="list-style-type: none"> <li>✓ Agents can easily access all relevant information and context in one central view to deliver a seamless, responsive customer experience</li> </ul>
Interaction Links in Media Viewer	<p>Quick access to information and external documents including PDF files, videos</p> <p>Open HTML-based linking to any artifact such as a CRM page, or any record that is web-accessible</p>	<ul style="list-style-type: none"> <li>✓ Agents can quickly navigate full conversation history and related media</li> <li>✓ Rich interaction context with ability to track and manage all tasks and interactions including web records via <i>AnyTask</i> functionality</li> </ul>
Dynamic Template Content	<p>Smart tags can be used in templates for email, chat and SMS</p> <p>Tags can be any task variable including: contact name, agent name, tracking number, etc.</p>	<ul style="list-style-type: none"> <li>✓ Agents can provide more personalized and responsive email, chat and SMS interactions</li> <li>✓ Management has flexibility to easily add Dynamic Tags to templates</li> </ul>

## Enhanced Communication and Management Tools

Improvements to task management with greater control for simplified agent and customer engagements.

Features	Descriptions	Benefits
Max tasks per Agent, per channel	Ability to assign individual agents maximum number of tasks per channel based on capabilities and experience, e.g., Agent A can handle two chats concurrently, Agent B can handle four, etc.	<ul style="list-style-type: none"> <li>✓ Agents can be assigned concurrent task workload based on their experience and skill sets</li> <li>✓ Simplifies training of new team members with ability to easily modify assignments</li> </ul>
User Defined Messages: Chat/SMS	Ability to tailor system messages for chat/SMS to reflect corporate messaging – e.g., member, citizen, patient, etc., rather than blanket term “customer”	<ul style="list-style-type: none"> <li>✓ Personalizes and differentiates your business with a more tailored, relevant experience for the end user</li> </ul>
Notification Enhancements	<p>More visible notifications of incoming chat and SMS messages, emails, phone calls, outside (any non-IE) browser</p> <p>Enhancements are for both agent and customer</p>	<ul style="list-style-type: none"> <li>✓ Increase agent efficiency in handling of multiple contacts in multiple tabs or applications</li> <li>✓ Reduces customer effort</li> </ul>
GUI Improvement: Chat/SMS	Updated GUI for users to easily distinguish between agent and customer messages	<ul style="list-style-type: none"> <li>✓ Agents can be more efficient and accurate with enhanced intuitive interface</li> </ul>
Contact Center Chat Closed Button	Single button in Business Hours scheduler interface to activate chat closed behavior	<ul style="list-style-type: none"> <li>✓ Administrator can easily turn off chat as needed, e.g., due to site outage</li> </ul>
SMS Transfer and SMS Transcript	<p>SMS conversations can be transferred</p> <p>Option to have SMS transcripts emailed to customers at end of conversation</p>	<ul style="list-style-type: none"> <li>✓ Agents can provide better service with ability to transfer for quick issue resolution</li> <li>✓ Organizations can ensure that customers receive a transcript of their conversations if desired</li> </ul>
Preview Dialer Events and Behavior	<p>Task created when a preview record is issued</p> <p>Tracks time and activity for preview in addition to the call</p>	<ul style="list-style-type: none"> <li>✓ More complete picture of agent activity</li> <li>✓ Better reporting and visibility of the full task from preview to call</li> </ul>

## Omnichannel features and benefits

### Extensive Integrations

Deeper and enhanced integrations providing organizations flexibility to extend the value of their existing desktop applications and seamlessly and consistently manage and report across all system.

Features	Descriptions	Benefits
UWF Support for Cisco V11.5	Complements and supports Cisco V11.5 ECE (Enterprise Chat and Email) support Full Task Routing API, email, chat, SMS and <i>AnyTask</i> for UCCE, PCCE, HCS	<ul style="list-style-type: none"> <li>✓ UWF enhances the Cisco contact center by providing an out-of-the-box connected digital customer experience</li> <li>✓ Powerful solution with UWF's Single Agent Desktop, seamless integration with all channels, applications and systems coupled with Cisco's enterprise-class universal queue</li> </ul>
Enhanced Integration Gateway Support in Third-Party CRMs	Enhanced APIs for task management between third-party CRMs and UWF UWF task management and softphone controls accessible within third-party CRM applications Full bi-directional information exchange	<ul style="list-style-type: none"> <li>✓ Gain deeper visibility with CRMs more aware of UWF tasks</li> <li>✓ Agents gain efficiency by operating in CRM applications while maintaining the full power of UWF</li> </ul>

### LAR/PAR Improvements and Enhancements:

More personalized and responsive service with enhancements to Last Agent Routing (LAR) and Personal Agent Routing (PAR).

Features	Descriptions	Benefits
Last Agent Routing (LAR) and Skill Assignment	LAR now respects skill assignment and will only route to last agent if the agent is skilled for the current task Example: Customers who have an assigned agent through LAR for customer service would not be sent to that same agent for billing	<ul style="list-style-type: none"> <li>✓ Optimized use and support of agent skills as they move between skill assignments</li> <li>✓ Improved customer experience allowing only agents skilled to assist them to be engaged</li> </ul>
Personal Agent Routing (PAR)/LAR based on business hours	LAR/PAR reservation time now calculated based on business hours. Non-business hours do not count against reservation time.	<ul style="list-style-type: none"> <li>✓ Improved management with greater accuracy and consistency in service level measurement and reports</li> </ul>

### Inclusion of Interaction History Records in Historical Reporting Database:

More granular reporting capabilities for detailed interaction history data and easy scheduling of detailed reports within CUIC.

Features	Descriptions	Benefits
Inclusion of Interaction History Data in CUIC reports	Interaction detail report now includes all data captured by interaction capture Provides ability to generate detailed reports with granular business information	<ul style="list-style-type: none"> <li>✓ Leverage CUIC to create and schedule detailed reports of customer contacts to meet business needs</li> <li>✓ Easily access lists of customers whose contacts match specified business criteria</li> </ul>
Scheduled Transfer of Interaction History Records to Reporting Database	Interaction history data is copied to reporting database on scheduled intervals Provides ability to access detailed records with minimal impact to production system	<ul style="list-style-type: none"> <li>✓ Detailed data is available to analytics and reporting systems for advanced business reporting needs</li> </ul>

## Omnichannel features and benefits

## Additional Enhancements

Features	Descriptions	Benefits
Inclusion of Interaction History Data in CUIC Reports	Consolidated phone queue stats and transfers in multi-PG centers Single click to transfer to multi-location agent pool	<ul style="list-style-type: none"> <li>✓ Greater visibility and simplified management across the enterprise</li> <li>✓ Simplified switch configuration of hardware and resources</li> <li>✓ Better resource management using call data to determine queue assignment</li> </ul>
Timestamps on Customer Replies Chat/SMS	Customer chat/SMS replies now have timestamps	<ul style="list-style-type: none"> <li>✓ Customers have access to more detailed interaction information with less effort required</li> </ul>
Improved Chat Distribution	Chat/SMS task allocation improvement for multi-chat environments	<ul style="list-style-type: none"> <li>✓ Agent efficiency increased with improved, even distribution of tasks across all agents</li> </ul>
UWF Stats, Directory Queue, and Task View Auto Updates	Gadgets now refresh automatically	<ul style="list-style-type: none"> <li>✓ Agents more productive with accurate information at their fingertips</li> </ul>

## Other Customer Driven Enhancements:

## New Preferences Gadget for Agents

- Empowers agents to set and make changes to selected settings: My Profile Tab, Email Signature Tab, Out-of-Office Tab

## Interaction Activity – Resend Email Functionality

- Enables agents and supervisors to resend completed email from Interaction History

## Interaction Activity– SLA Indicator in My Queue

- Enables agent to quickly see SLA warning notice
- Color coding for different stages of SLA

## Contact eLoyalty?

eLoyalty.com  
 solutions@eLoyalty.com  
 +1.512.391.7700  
 +1.800.835.3832

## Why eLoyalty?

eLoyalty, a TeleTech company, was the first North American partner to achieve Cisco HCS Certification and Contact Center as a Service Designation, has received the Cisco Advanced Technology Partner Certification for Contact Center Enterprise and Customer Voice Portal, and the Cisco Customer Satisfaction Award every year since 2007. We are the only Cisco Cloud Partner offering a solution with this type of increased flexibility and capability incorporated directly into the HCS platform. With a 95 percent client renewal rate, eLoyalty has proven itself a deserving partner as it helps chart customer experience technology roadmaps, implementing cloud systems to provide safer, faster, smarter, and more agile service interactions. For more information, contact us at solutions@eLoyalty.com or visit [eLoyalty.com](http://eLoyalty.com).

