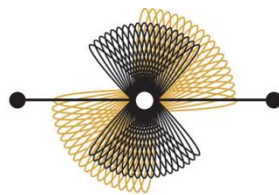


Interaction Feedback 4.0

Feature Overview



INTERACTIVE INTELLIGENCE®
Deliberately Innovative

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Last Updated: September 2011

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Interaction Feedback 4.0 Feature Overview

Interaction Feedback™ is the first Customer Feedback Management solution offered as part of a truly unified, all-in-one communications platform. Interaction Feedback helps organizations seize the opportunity to collect customer feedback at the point of interaction, the contact center, to accurately measure and proactively improve customer service.

Customer perceptions of an organization can impact retention, costs and future revenues in the form of recommendations, repeat purchases, and increased spending. With discussions of improving the customer experience now taking place at the board level, the contact center is the critical hub to capture the “voice of the customer” for the entire organization. Interaction Feedback, as part of the ININ all-in-one platform, offers an alternative to costly, complex and inflexible survey options.

Types of surveys available with Interaction Feedback 4.0

Survey Type	Description
Automated post-call surveys	For inbound interactions that involve a live agent in a workgroup queue

Features

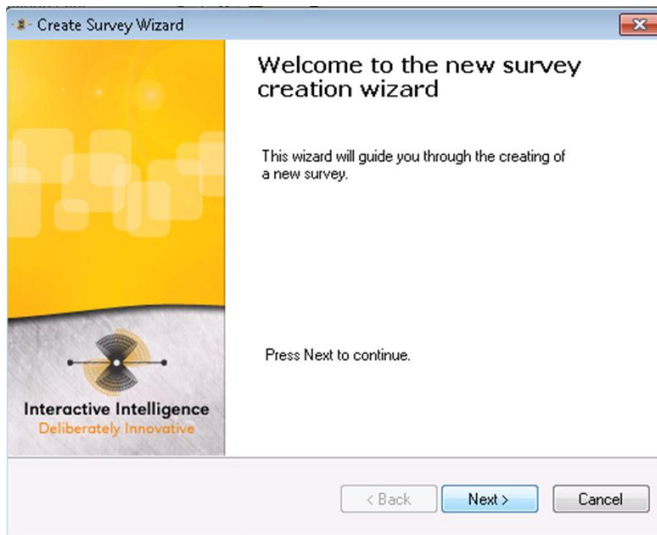
The Interaction Feedback survey module in IC Business Manager lets survey authors (typically contact center and other business operations users) create and manage surveys without involving technical or programming resources. From the same module, users can also access survey results. Business users can quickly adapt surveys to changing business needs with a flexible, intuitive interface and wizard-driven survey creation process. Features like pre-defined templates, context menus, “copy” capability and the ability to organize surveys by team or business need (i.e. “Customer Service,” “Marketing,” etc.) help increase the speed and ease of survey creation.

Creating Surveys

Survey Definition

Survey Group – allows similar surveys to be put under a user-defined heading. For example, an organization might want to put all of its Customer Service surveys under one survey group, and all Marketing surveys in another.

Survey Settings - A wizard-driven process quickly guides the user through the set-up of new a new survey, including selection of required and optional settings specific to that survey.



Survey creation wizard

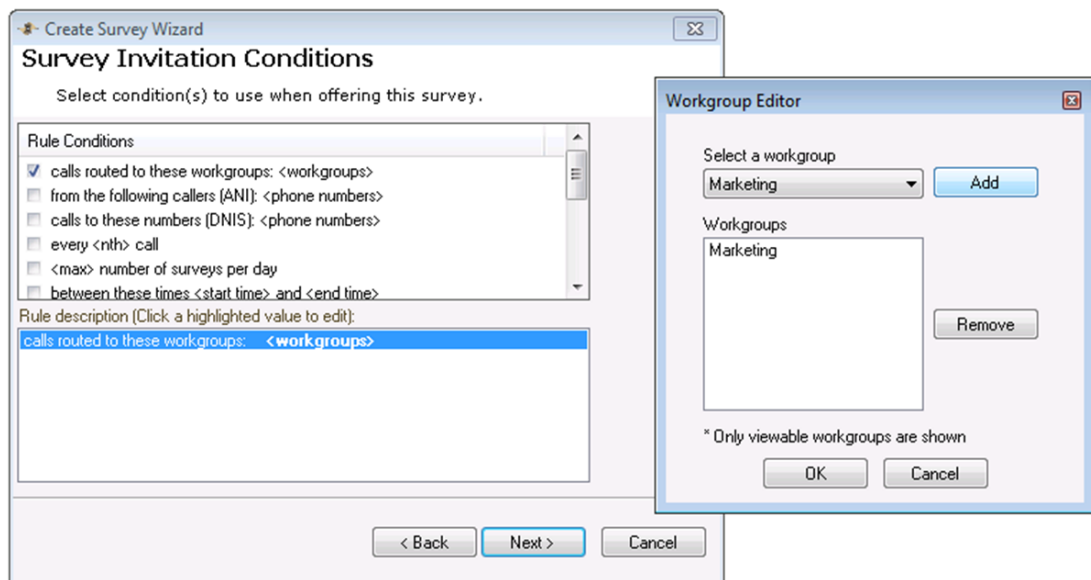
Automatically Record Calls (optional) - Customers with Interaction Recorder can select a setting to automatically record interactions for calls where participants “opt-in” to a survey, ensuring call recordings will be available for review if indicated as necessary by survey scores.

Minimum Acceptable Score (optional) – users can configure a setting to configure alerts in Interaction Supervisor to notify appropriate personnel when a completed survey score falls below this threshold.

Rank Group — Rank Group is the grading scale that is used for a Survey. The same Rank Groups are shared between Interaction Feedback and Interaction Recorder, to provide a consistent basis for comparison between internal and external (customer) perceptions of performance for a given interaction. Users may define as many different Rank Groups as they like, however each Survey can have only one Rank Group associated with it. The Survey Scoring Reports will display satisfaction ranking results for an individual agent or groups of agents. The Satisfaction vs. Quality Report will provide comparisons data for satisfaction vs. quality scores for an agent or a group of agents. The consistent ranking calibration between agent performance improvement and customer satisfaction available in CIC’s all-in-one platform enables organizations to link Quality with the Voice of the Customer, and better support coaching or evaluation efforts.

Rule Conditions - Different organizations may have very different business requirements for surveying customers. Yet often, existing “bolt-on” (or even custom) solutions offer only limited options for survey call selection. To offer more flexibility, Interaction Feedback allows multiple rule conditions for each survey. A rule condition is a set of criteria that Interaction Feedback evaluates to determine if a call should receive a survey invitation. Because Interaction Feedback is tightly integrated to the Interaction Center platform, a user can define custom attributes of a call to survey, such as the results of a database lookup, and use those attributes to trigger a survey invitation. Configurable selections allow survey authors to define which calls receive a survey invitation and under what conditions based on parameters such as:

- Workgroup
- ANI
- DNIS
- Every *n*th call (frequency)
- Maximum number of surveys per day
- Day, Date, Time selections
- Call attribute



Rule conditions for survey invitation

Survey Prompts – users can specify “general” survey prompts to be used for things like the survey invitation that asks a caller to participate, or a confirmation of that caller’s “opt-in” that thanks them and reminds them to stay on the line following their interaction. Pre-configured prompts are available, or users can create custom prompts by:

- Uploading pre-recorded .wav files
- Recording through the handset
- Using Text-To-Speech (TTS)

Questions

Questions are the building blocks for Surveys, and what Interaction Feedback’s entire scoring system is built around. The name actually refers to the type of question *response*, which can be a True/False statement, numeric scale, or multiple choice. Each Question is assigned a number of possible answers, and a score is assigned to each answer. Weights can also be assigned to a question.

Question Types

- Multiple Choice
- Numeric
- True/False (yes/no)
- Free-form comments

Free-form (Recorded) Comments

To truly understand the “voice of the customer,” the ability to capture direct customer comments or customer “verbatim” is essential. Customer comments are often where “dissatisfiers” (factors that contribute to customer attrition) are revealed. Interaction Feedback enables organizations to offer survey participants the opportunity to record their “free-form” comments. These recorded comments are managed by Interaction Feedback and accessible for playback, along with survey questions and responses, in the Survey Results.

Question Prompts

Each Question will have its own prompt that plays for the caller. Like the general Survey prompts, Question Prompts can be uploaded as pre-recorded .wav files (including professionally recorded prompts), recorded through the handset, or Text-To-Speech (TTS).

The image shows two overlapping software windows. The background window is titled 'Create Question Wizard' and has a sub-header 'Question Settings'. It contains a 'Question Type' dropdown set to 'True/False', a 'Name' field with 'Problem Resolution', a 'Description' field, a 'Question Prompt' dropdown with '[add recording]', and 'No input prompt' and 'No match prompt' dropdowns both set to '<Default>'. The 'Question weight' is set to '1.00' with a checkbox for 'Ignore score for question'. The foreground window is titled 'Prompt Edit'. It has a 'Prompt Audio' section with 'Station handset record' selected, showing 'Telephone Handset' and 'Station: 3174181037' with a 'Record' button. There is also a 'Wave file selection' option with a 'File:' field and a 'Browse' button. Below this is a 'Listen to Prompt' section with 'Play To:' set to 'PC Speakers' and a 'Play' button. The 'Prompt Information' section has a 'Name:' field with 'Problem Resolution' and a text area for 'Enter text-to-speech that will play if prompt is unavailable' containing the text: 'Were we able to resolve your issue on this call today? Press 1 for Yes or 2 for No.' At the bottom are 'Save' and 'Cancel' buttons.

Record custom prompts

Survey question prompts (and all other survey recorded prompts) are easily managed within the Interaction Feedback module.

Question Categories

Survey Questions can be grouped in Categories, to allow organizations to identify how customers evaluate them on key “drivers” of satisfaction (e.g. “Product Quality,” “IVR Process,” or “Agent Knowledge,” etc.) or desired future behaviors, (e.g. recommendations, repeat purchases, etc.).

Scoring and weighting

Users can configure scoring and optional weighting selections for each question response for a survey. The system will calculate an overall score for a Survey based on the scoring and weighting for each survey Question. Each Question can be weighted so that its score contributes more or less to the overall score of the Survey to which it belongs.

Library Templates

Interaction Feedback ships with a Library of pre-configured question templates, and enables users to create their own survey and question “templates” and store them in the Library for easy access and re-use.

***ACSI-Compliant Surveys**

Interaction Feedback incorporates [CFI Group’s](#) survey question templates to provide organizations with best practices for satisfaction survey configuration. Since 1988, more than 300 organizations have used CFI Group’s scientific approach to improve satisfaction, loyalty and financial results. CFI experience is based on the world’s most precise, reliable, and actionable science to turn "voice of the customer" data into strategies for measurable results. CFI Group developed the methodology used by the University of Michigan’s [American Customer Satisfaction Index™](#) (ACSI).

By using CFI Group’s proven ACSI survey question templates available in Interaction Feedback, organizations are assured they are asking the right questions based on what they want to measure.

A user can select ACSI questions directly from the Library; these questions are already pre-configured with recorded prompts and scoring settings. *(Note: you can create your own questions and add them to the library for future re-use; however, only ACSI questions will have their own unique icon and format.)*

Interaction Feedback will automatically validate ACSI-compliant surveys based on requisite format and question content from each of the three sections:

1. “Drivers” of satisfaction – these can be related to customer perceptions about the agent, internal processes, or even the organization itself. Some drivers are specific to the agent or CSR; some relate to process or the organization as whole, but all can impact customer satisfaction.
 - CSR Communication Skills
 - CSR Demeanor
 - CSR Knowledge
 - Image (organization)
 - IVR (process)
 - Problem Resolution
 - Quality of Information
 - Timeliness – time spent on interaction and time to reach CSR
2. Customer Satisfaction - Customer satisfaction relative to ideal or expected experience
3. Potential “outcomes” or desirable future customer behaviors an organization would ideally like to achieve, for example: recommendations, repeat purchases, or trying new products.

Based on survey results, organizations can more easily identify which category, or “driver” of satisfaction may need additional attention to improve (or capitalize) on that particular part of the customer experience, as these “drivers” feed into overall satisfaction, and ultimately, future outcomes like repeat purchases and recommendations. For example: if there are consistently low

scores across multiple agents for CSR Knowledge, this might indicate a general training issue. Or, if CSR Knowledge scores are low for a particular agent, individualized coaching might be in order. Conversely, if satisfaction scores are particularly high for an agent or workgroup, that can be the basis for rewards or incentives.

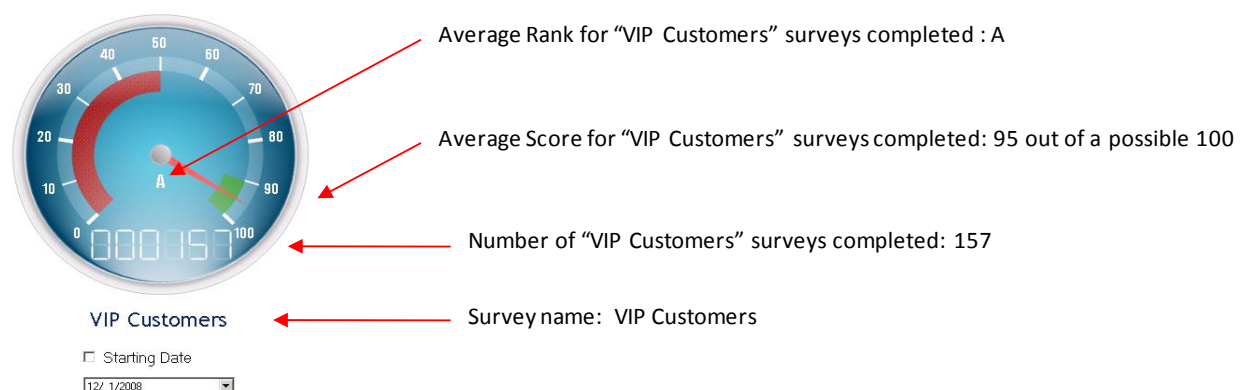
Data collected with Interaction Feedback's "ACSI compliant" surveys can be used by CFI Group should your organization choose to engage them for customized consulting and analysis of your survey program. CFI Group maps the causes-and-effects of customer satisfaction and provides actionable steps to improve customer satisfaction for maximum impact and ROI. CFI Group clients have the ability to benchmark themselves against both the nationally-recognized ACSI, published with the University of Michigan and the CCSI (Contact Center Satisfaction Index) published by CFI Group.

Survey Results

Part of the value of Interaction Feedback surveys will be the immediacy of access to survey results.

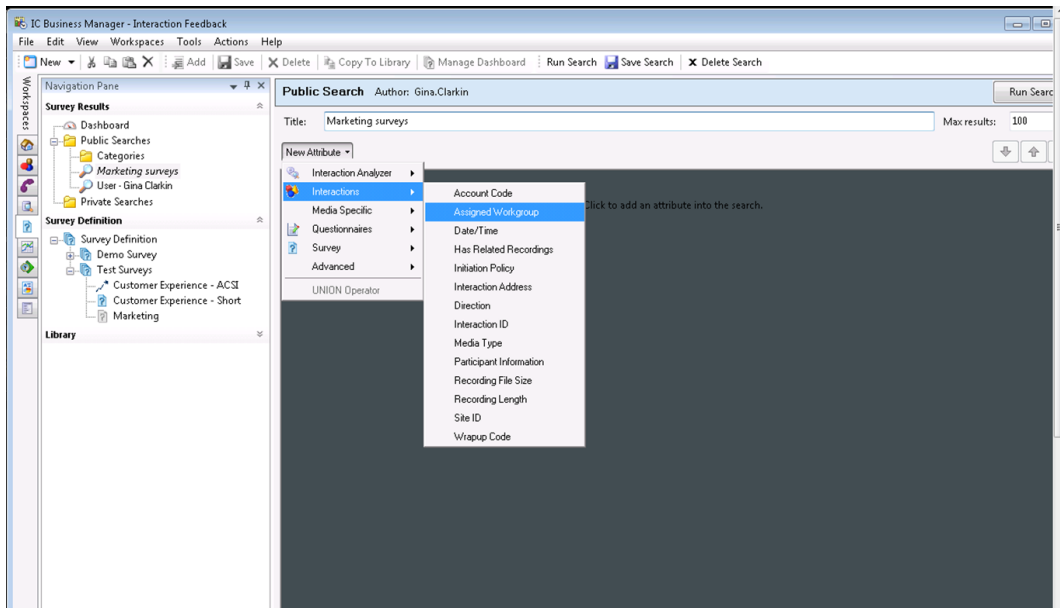
Dashboards

Dashboards provide a "heads-up" display view for at-a-glance information about a particular survey, by date: average score for a survey, by overall ranking, and number completed. Based upon the configured rankings for a particular survey, dashboards display red "danger" zones, and green "ideal" zones.

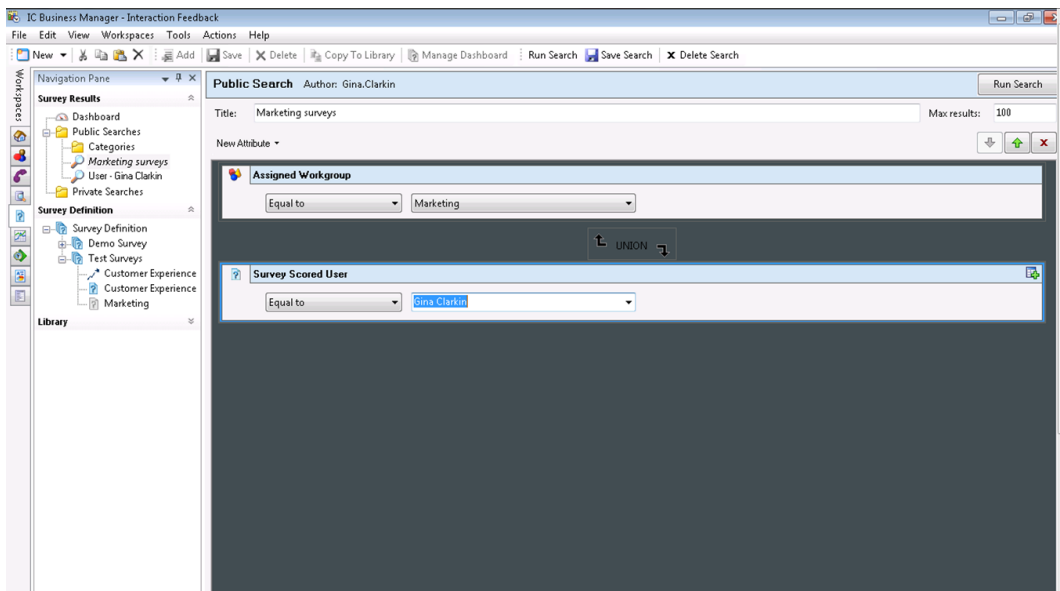


Search

From the Interaction Feedback Client interface, authorized users will be able to search and view survey results. Users will have the ability to quickly configure "nested" searches, using compound attributes, to quickly access the desired information, without having to use complex query logic. For example, someone might want to search by survey name, for a particular agent, within a certain date range. (E.g. all "Customer Service" surveys, for agent John Smith, last month.)



Results search attributes



Nested search

Once the search results are returned, a user can select a particular survey and drill-down into the details, to view information for a specific survey including, but certainly not limited to:

- Question (name and text) and its response and score
- Overall survey score
- Min/max score
- Agent
- Call ID
- Recording ID
- Survey Duration
- Recorded comments playback
- Apply a variety of filtering options (agent, survey name, etc.)
- Search by a variety of parameters (survey name, agent, customer, etc.)

For organizations with Interaction Recorder, users can choose common data elements like the Recording ID to access any recorded interactions associated with a particular Survey.

Marketing surveys (11 results found)

Survey Name	Agent	Caller	Score	Rank	Completed	Date	State	Interaction Id	Recording Id
Customer Experience - Short	Clarkin, Gina	Gina Clarkin	51	Near Perfect	True	9/7/2011 3:02	Complete	20019201672011	52514112-980D-
Customer Experience - Short	Clarkin, Gina	Gina Clarkin	20	Failure	True	9/6/2011 2:58	Complete	20019201492011	94024112-EAC8-
Customer Experience - Short	Clarkin, Gina	Gina Clarkin	48	A	True	9/6/2011 2:31	Complete	20019201472011	
Marketing	Clarkin, Gina	Gina Clarkin	0	Failure	False	9/6/2011 1:18	Caller Disconn	20019201452011	
Marketing	Clarkin, Gina	Gina Clarkin	0	Failure	False	9/6/2011 1:16	Abandoned	20019201422011	
Marketing	Clarkin, Gina	Gina Clarkin	36	Best	True	9/6/2011 1:12	Complete	20019201402011	
Customer Experience - ACS	Clarkin, Gina	Gina Clarkin	67	B	True	9/1/2011 5:09	Complete	20019201092011	C8803F12-8F94-D
Customer Experience - ACS	Clarkin, Gina	Gina Clarkin	71	B	True	9/1/2011 4:57	Complete	20019201062011	1A803F12-DC0E-
Customer Experience - ACS	Clarkin, Gina	Gina Clarkin	74	B	True	9/1/2011 4:31	Complete	20019201032011	B27E3F12-ASA4-
Demo Survey #1	Clarkin, Gina	Gina Clarkin	0	F	False	9/1/2011 4:27	Abandoned	20019201012011	

93.8% (Near Perfect)

0% 100%

Min Score: 6 Max Score: 54 Score: 51

Name	Answer	Score	Question Type	Min Score	Max Score	Weight	Description
Driver - CSR Demeanor 1 (2)	9	9	Numeric Range	1	9	1	Please rate the Customer Service Representative's willingness to
Driver - CSR Communication Skills 1 (1)	7	7	Numeric Range	1	9	1	Please rate the Customer Service Representative's ability to con
Customer Satisfaction 1 (3)	9	9	Numeric Range	1	9	1	How satisfied are you with your Customer Service experience?
Customer Satisfaction 2 (3)	9	9	Numeric Range	1	9	1	To what extent has your Customer Service experience fallen sh
Customer Satisfaction 3 (3)	8	8	Numeric Range	1	9	1	How well do you think your Customer Service experience com
Outcome - Try New Products (1)	9	9	Numeric Range	1	9	1	How likely are you to try other products from our company? F
Tell Us - Comments	Listen to comments	0	Freeform Recording	0	0	0	

Survey results

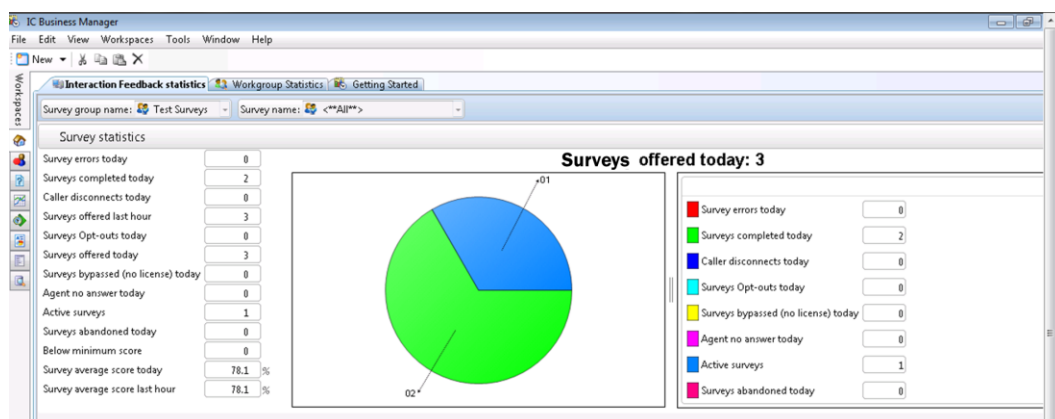
Monitoring & Alerts – Interaction Supervisor

Monitoring and alerts for survey activity are available via the Interaction Feedback plug-in in Interaction Supervisor, now in IC Business Manager.

Monitoring

Supervisors can monitor survey activity to see real-time statistics by survey that can include:

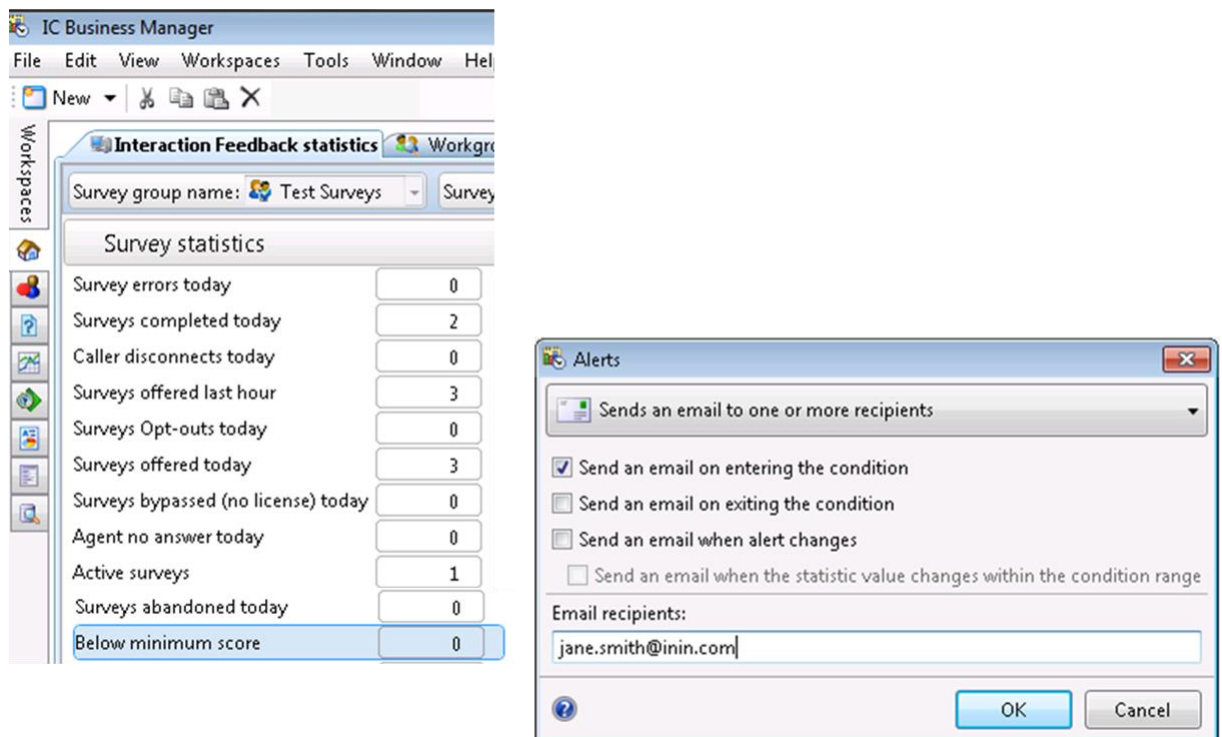
- Surveys offered last hour
- Surveys offered today
- Active surveys (in-process)
- Completed surveys
- Abandoned surveys
- Surveys where callers opted-out
- Surveys with scores below “minimum acceptable score”



Survey statistics

Alerts

Survey best practices underscore the importance of timing for survey delivery. Recommendations are that in order to increase results accuracy, a survey should be offered as close to the conclusion of the interaction as possible. But equally important is timing relative to the speed at which an organization can respond to customer issues. Interaction Feedback offers real-time alerts that can be configured to trigger based on a survey score or any other available Interaction Supervisor survey statistic. For example, survey scores that fall below a “minimum acceptable score,” real-time alerts can be set to notify appropriate personnel (a Supervisor or “Customer Retention Specialist,” for example), prompting proactive approaches to address issues before they escalate past the “point of no return.”

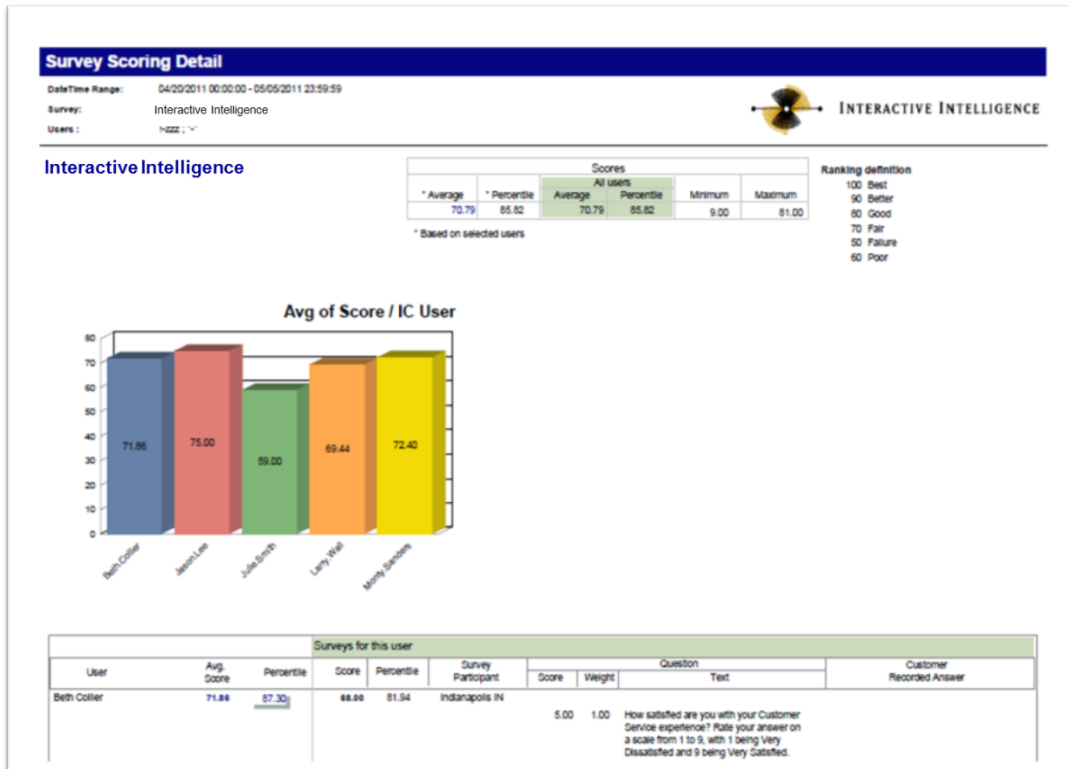


Configurable alerts

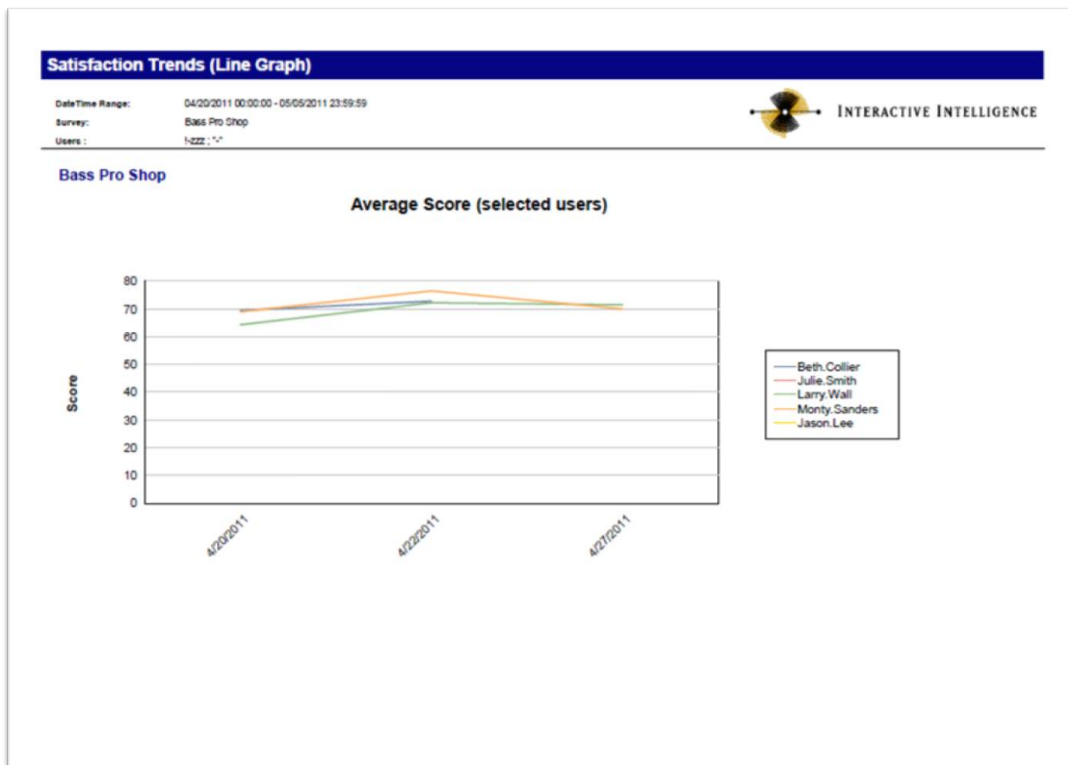
Historical Reports

Historical reports are available for Interaction Feedback with CIC 4.0 GA and can be accessed through the IC Business Manager by way of the new Interaction Reporter module. Interaction Feedback historical reports can provide insight into:

- Satisfaction ranking by agent - how individual agents compare in terms of satisfaction scores and ranking,
- Comparison of “external” survey results to “internal” QA results with scored recordings (*available with Interaction Recorder*)
- Reports that break-out survey scores by question categories can help managers identify “drivers” of satisfaction that might need improvement or incentives for continued success.
- Satisfaction trends over time, by agent

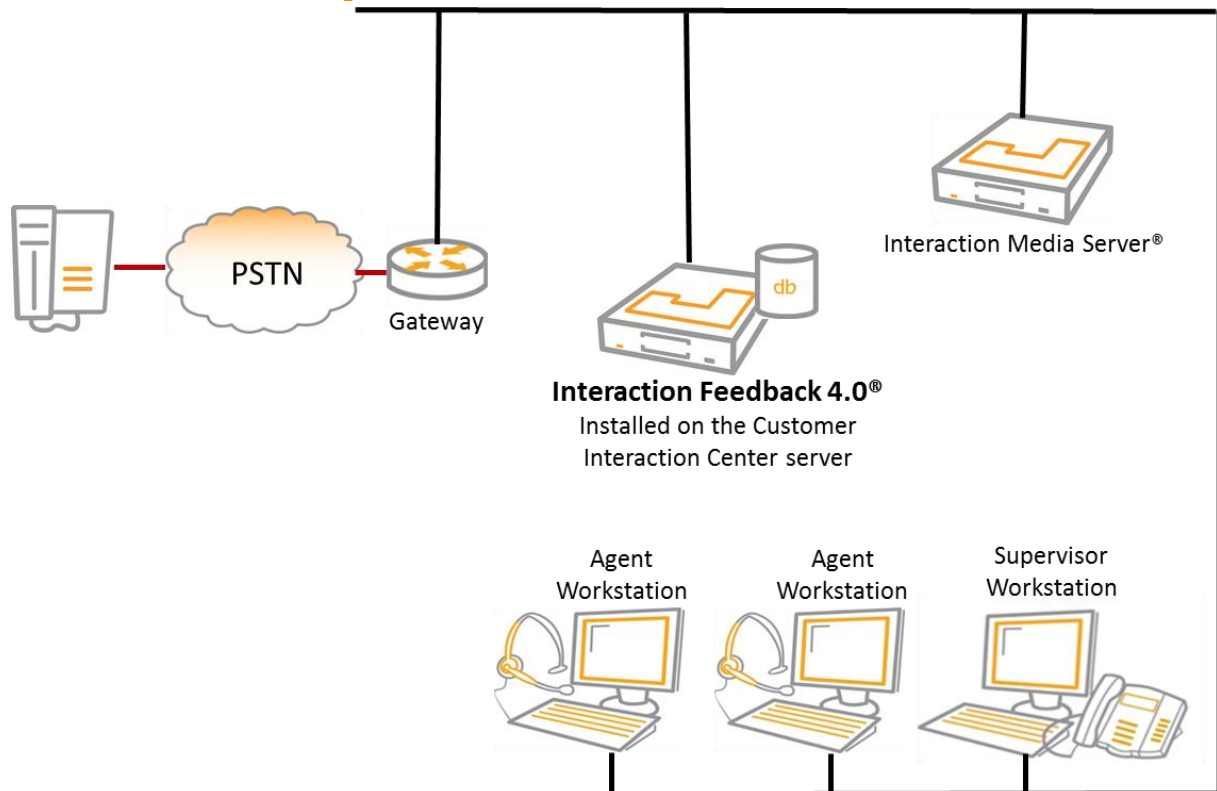


Survey scoring detail



Satisfaction trends

Achitecture and Components



Interaction Feedback Server Subsystem (Survey Service)

The Interaction Feedback subsystem components are inherent to and installed with the baseC IC system, and become active and available for CIC system use when Interaction Feedback is included in the CIC license. The Interaction Feedback subsystem controls all aspects of Interaction Feedback survey delivery. Its primary function is communicating survey event notifications to other processes and components within the system.

Interaction Feedback Database

The IC Database Configuration program creates the Interaction Feedback database tables along with other IC tables, such as report log tables and Interaction Tracker tables, as part of the overall IC database installation and configuration. Interaction Feedback uses the IF database tables to store the survey definitions and survey results. Additionally call detail information such as caller, agent(s), line, workgroup can be linked to individual surveys.

Interaction Feedback User Interface

The Interaction Feedback user module is available in the IC Business Manager. With this module, authorized users can configure, modify and activate/de-activate surveys and search and view survey results. Users can access only the Surveys or Survey Groups to which they have been granted access from within Interaction Administrator. The Interaction Feedback module in ICBM can be run from any workstation computer having network connectivity to the CIC server with an Interaction Feedback license.

Interaction Administrator Plug-in

Interaction Administrator (IA) is the system configuration interface for the IC platform. When IC recognizes that Interaction Feedback is included as a feature component in the CIC license, the IF configuration container elements are added to the IA tree, and access dialogs. The Interaction Feedback containers in IA are where administrative (license and permissions) aspects of Interaction Feedback functionality are configured and maintained.

Interaction Feedback Supervisor Plug-In

In Interaction Supervisor, authorized users can monitor survey activity (in process, completed, abandoned, etc.) and configure alerts, for example, in conjunction with the “minimum acceptable score” statistic for a given survey.

Interaction Media Server

With version 4.0, CIC is now a pure application server, a shift that eliminates the need for third-party voice hardware or HMP software. In place of voice hardware and HMP, Interactive Intelligence has expressly upgraded the Interaction Media Server appliance to handle all audio processing needs of CIC, including survey prompts and DTMF (IVR).

Interaction Feedback Licensing

Interaction Feedback licenses are incorporated into the License Management system on the CIC server. Interaction Feedback 4.0 is available in either Named or Concurrent license models. For more information on concurrent licensing in CIC 4.0, please refer to the CIC 4.0 Feature Enhancement document available on the ININ Partner and Support portals.

Server (Feature) License

The Server license enables the application features on the CIC server.

I3_FEATURE_BASE_FEEDBACK - This license component enables all feature functionality of Interaction Feedback on the IC server. Having this feature component in the IC Server license bundle enables the Interaction Feedback survey subsystem and the configuration containers in IA.

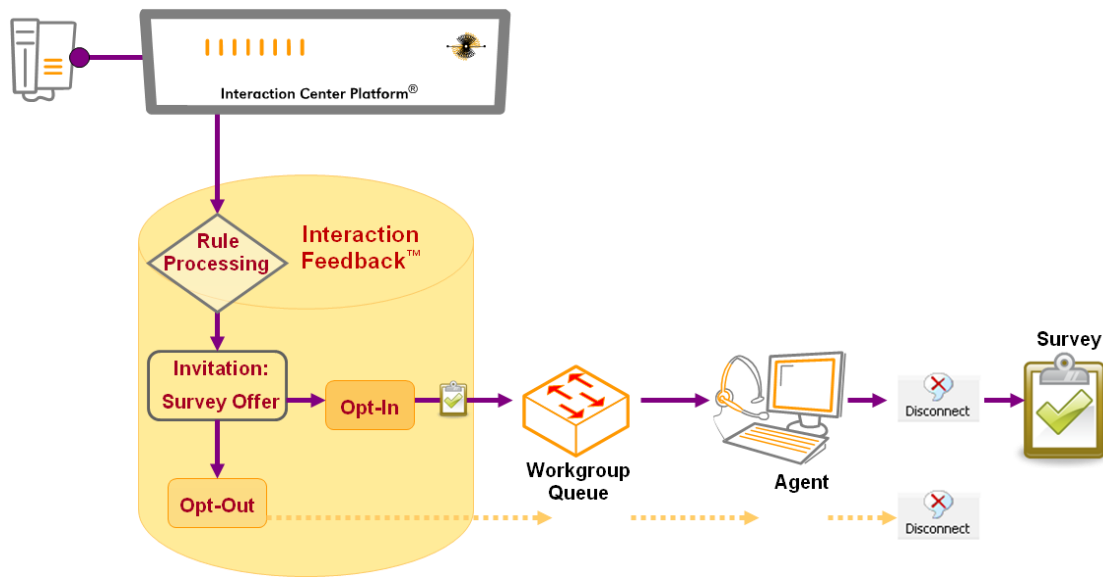
I3_FEATURE_POST_CALL_FEEDBACK – In the initial release, the Server license enables post-call surveys by default.

I3_ACCESS_FEEDBACK_SUPERVISOR_PLUGIN – The Server license also enables reports and statistics in Interaction Supervisor.

Add-On (Access) License

I3_ACCESS_FEEDBACK - Required for a user to access the Interaction Feedback module in the IC Business Manager application for survey configuration or results viewing, or to have a survey applied to an interaction in which they were a participant. Each time a survey event is requested by the Interaction Feedback subsystem, Interaction Feedback checks to verify that the IC user associated with the requested survey event has an I3_ACCESS_FEEDBACK license assignment. In the event that an IC user associated with a survey event request does not have an I3_ACCESS_FEEDBACK license assigned, the interaction will not be surveyed.

Interaction Feedback Survey Flow



A call comes into the IC system. The call ID is passed to the Interaction Feedback Survey Service, which determines whether that call should receive a survey based on pre-defined Rule Conditions (e.g. Every n th call, Workgroup, Call Attribute, etc.). If the call matches pre-defined criteria for a survey then the IC system plays a prompt where a caller receives an invitation to provide feedback at the conclusion of their interaction. The caller can decline to participate in the survey by “opting-out” and the call will proceed to the workgroup queue as normal. Or, for the caller who opts-in and agrees to provide feedback, another prompt can be delivered that thanks them and reminds them to stay on the line after completing their interaction. The call is flagged with a call attribute in order that the IC system can direct the call to a survey following the agent interaction. The call proceeds to an agent; the interaction occurs. Upon agent disconnect (or optional Client custom button press for pegged agents), the previously set call attribute automatically triggers survey delivery without any agent intervention. Upon survey completion, survey results are available for viewing.

Key Features and Benefits

Reduced cost and complexity with customer surveys as part of an all-in-one platform

- Simplified deployment / installation with “just another license key”
- No costly integrations or expensive hardware
- Familiar supervisory interfaces
- No need to piece together information from different systems to get a holistic view of the customer interaction
- Control over the surveying process because the IC platform has control over the call

Increased efficiency and effectiveness with automation and ease-of-use

- Avoid dependency on programmers or third parties to create or modify surveys - wizard-driven survey creation and templates enable fast, easy and flexible survey customization and delivery by contact center business users
- Totally automated surveys (no agent engagement required) - eliminate agent bias and influence; increase accuracy of survey results
- Deliberate surveying with rule-based survey invitation - embedded “intelligent” rule logic specific to each individual survey

Proactive intervention with access to critical information and integrated monitoring

- Address customer issues when there is still opportunity - real-time supervisory alerts based on pre-defined scoring thresholds
- Equip supervisors and managers with knowledge of what actually happened – customer survey results and the recording of the interaction (requires Interaction Recorder)
- Directly impact agent performance – use “listen in,” “whisper” and other coaching features for agent performance improvement to increase satisfaction; leverage recordings of “successful” interactions with high satisfaction scores as training tools
- Identify potential gaps between internal and end customer view of customer service - 360 degree view based on association between call recording, scoring and specific survey results
- Monitor satisfaction trends over time – determine if coaching, training, or other actions are having the desired impact on customer satisfaction

Best Practices from satisfaction experts, CFI Group

CFI Group, in conjunction with the University of Michigan Ross School of Business, created the American Customer Satisfaction Index™ (ACSI) patented methodology to quantify drivers of satisfaction and impact on financial performance.

- “Built-in” best practices - ACSI question library from CFI Group takes the guesswork out of survey creation with proven survey questions and design available in Interaction Feedback*
- Assures organizations are asking the right questions based on what they want to measure
- “Next steps” for Interaction Feedback customers to take results to the next level - data collected with Interaction Feedback’s “ACSI-compliant” surveys is ready for use with CFI’s predictive analytics for custom benchmarking and ROI consulting

Extensibility for the future

Ability to extend multiple survey delivery options from a single platform to survey over different channels by various media (IVR, email/web, chat) and mode (post-call, inbound, automated outbound)

- Flexibility to survey additional stakeholders (e.g. employees), departmental or business users
- Roadmap for continued enhancement and integration with other advanced technologies (e.g. Interaction Process Automation, Interaction Analyzer)

Change Log

Document Name	Purpose and Revision History	Date Issued:	Version:
Interaction Feedback 4.0_Feature Overview	4.0 GA Release	September 12, 2011	Version 1.0