

GENESYS

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Genesys Designer Help

Setup Survey Block

Setup Survey Block

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You can use the **Setup Survey** block in the **Assisted Service** phase to set up a survey for the caller.

Typically, you offer the survey earlier in the call, in either the **Self Service** phase or before routing begins in the **Assisted Service** phase. Then, once the caller has been served, place the **Setup Survey** block in the **Assisted Service** phase to provide the survey functions.

Once the block is set, you can choose to start the survey immediately (the caller completes the survey within the **Self Service** phase of the current application), or after the caller has finished talking to an agent (if they agreed earlier to take the survey, the caller is then sent to a number assigned to a survey application).

You can also choose to not start the survey if the caller rejects the offer or to not offer the survey at all.

Using this Block

In most applications, you will place a User Input block before the **Setup Survey** block and use prompts to ask the caller if he wants to take a survey. You can then use a Segmentation block to segment the call based on the caller's response.

The sections below explain how to incorporate a survey into an existing application. Your application and User Variable names might differ.

Important

The examples below offer the survey in the **Assisted Service** phase, but it is also possible to offer the survey in the **Self Service** phase. In either case, the **Setup Survey** block must be placed in the **Assisted Service** phase.

Offer the Survey

Click the **Initialize** phase and create a **User Variable** named **varSurveyResponse**.

Application Flow Actions -	Properties - Initialize	
Initialize	This block or phase is typically used to setup variables for the application and in Assign blocks can be used to calculate expressions and assign their results to phase.	nitialize them. variables in this
? Self Service	Luser Variables 🖩 System Variables	
C Assisted Service	Specify User Variables. String values must be surrounded by single quotes.	
✔ Finalize	+ Add Variable	
	Name Default Value	Private Delete
	varSurveyResponse	0 a

In the **Assisted Service** phase of your application, before the call is routed, add a **User Input** block and create a message in the **Prompts** tab. In this example, you can use the following values:

Application Flow Actions -	Properties - User I	nput					
Initialize	U This block multiple a	k is us ittemp	ed to ask a question and collect input from the s.	e user. It provides op	tions	for	
? Self Service ~	•) Prompts		nput 🍦 ASR Settings 💠 DTM	F Settings 🛛 🔹 🕯	Retry	y	
Assisted Service	🖺 Results	M	ilestone				
🖳 User Input	Specify prompts to	play to	o collect user input				
2 Call Data	+ Aug Frompt			-			
Segmentation - decide how to rou Y	Туре	Var?	Value	Play as	-	Actio	ons
	TTS •		Your feedback is important to us.	text	•	1	↓ 🕯
Route Call - route to default numb	TTS 🔻		We would like to offer you a survey.	text	•	٠	↓ 💼
✔ Finalize	TTS		Press 1 to take the survey.	text	•	Ť	↓ 🖬
	TTS T		Press 2 to not take the survey.	text	•	۴	4 1
	Prompts must fi Timeout - wait for	nish c	ompletely before users can provide input	was received.			

Next, in the **Results** tab, select the **varSurveyResponse** variable that you created earlier. This variable stores the input from the caller.

Application Flow Actions 👻	Properties - User Input
➡ Initialize	This block is used to ask a question and collect input from the user. It provides options for multiple attempts.
? Self Service Y	🔄 Prompts 🎬 Input 👙 ASR Settings 🎬 DTMF Settings 🐗 Retry
Assisted Service	🖰 Results 📕 Milestone
🔮 User Input	Store output result (either DTMF entered digits, or the ASR utterance) in this variable
Call Data	varSurveyResponse •
•	Store the output result details in this variable
Segmentation - decide how to rou Y	- choose variable 🔻
Route Call - route to default numb	The format of the output result details variable will be an object with the contents:
	Key Type Description
	successory successfully,

Next, place a Segmentation block to configure how your application responds to the result from the **User Input** block. In this example, configure the **Segmentation** block as shown below:

Setup Survey Block

pplication Flow Actions -
➡ Initialize
? Self Service ~
C Assisted Service ^
User Input
Segmentation
Set Up Survey
No Survey
Zall Data
Segmentation - decide how to rou 👻
Route Call - route to default numb
✔ Finalize

Properties - Segmentati	on	
This block is us outcome. E.g vi	ed to evaluate expressions and take different paths in th arZipCode==94014 can be used to take a different path v	ne application based on the /s varZipCode==95125.
+ Add Condition	Milestone	
Segment Label	Condition Expression	Delete
Set Up Survey	varSurveyResponse == 1	â
No Survey	varSurveyResponse == 2	i i

Set Up Survey Segment

The application processes the **Set Up Survey** segment if the caller pressed **1** to accept the survey. Next, the application uses a Play Message block to thank the caller for taking the survey.

Application Flow Actions -	Properties - Play	Messa	ge		
◆ Initialize ~	Files (pr	ck is use eviously	ed to play audio messages. These messages ca vuploaded in Audio Resources page, or variable:	n be TTS (Text to s played as TTS.	Speech), Audio
? Self Service Y	Specify prompts t	o be pla	yed		
Assisted Service ^	+ Add Prompt				
👤 User Input	Туре	Var?	Value	Play as	Actions
Segmentation ^	TTS •		Thank you for choosing to take a survey.	text	• • •
Set Up Survey	TTS 🔻		The survey will be at the end of your call.	text	* * 🕹 🛢
Play Message					
No Survey					
L Call Data					
Segmentation - decide how to rou Y					
Route Call - route to default numb					
✔ Finalize					

Next, place a **Setup Survey** block before the call is routed to an agent. Select the **Post agent: Survey will start after talking to an agent** option and enter the DN of the survey application. The example shown below uses the DN 5555, but your survey application might use a different DN. Optionally, you can enable the check box to specify the DN as a variable.

Application Flow Actions -	Properties - Setup Survey
➡ Initialize ➤	This block sets up a survey. It does not trigger a survey.
? Self Service ~	Choose one of these options to setup a survey application:
Assisted Service	Post agent : Survey will start after talking to an agent
🔮 User Input	Setup survey on this DN (number) 5555
Segmentation	Immediate : Survey will start immediately
Set Up Survey	Rejected : Survey will not be started
Play Message	Not offered
No Survey	
Call Data	
Segmentation - decide how to rou Y	
Setup Survey	
Route Call - route to default numb	
✓ Finalize	

The call forwards to the survey application. See the Creating the Survey Application section for more information.

No Survey Segment

The application processes the **No Survey** segment if the caller pressed **2** to decline the survey.

Place a Setup Survey block and select Setup was offered but it was rejected.

Setup Survey Block

Application Flow Actions -	Prope
🔹 Initialize 🗸	2,6
? Self Service ~	Choo
Assisted Service	0
🖳 User Input	0
Segmentation ^	۲
Set Up Survey	0
Play Message	
No Survey	
Setup Survey	
Call Data	
Segmentation - decide how to rou V	
Route Call - route to default numb	
Setup Survey	
✓ Finalize	

Properties - Setup Survey

This block sets up a survey. It does not trigger a survey.

Choose one of these options to setup a survey application:

- O Post agent : Survey will start after talking to an agent
- Immediate : Survey will start immediately
- Rejected : Survey will not be started
- Not offered

Survey Not Offered

You might have noticed that a third option exists in the **Setup Survey** block - **Setup was not** offered - no need to setup survey.

For reporting, this option records that the caller was never offered a survey. This can happen for several reasons. For example, the caller might have ended the call early or in the **Self Service** phase, or your application might contain a segment in which it does not make sense to offer a survey.

To receive reporting in these scenarios, you must place a **Setup Survey** block in your application and select the **Setup was not offered - no need to setup survey** option to record that this interaction did not include a survey offer.

Creating the Survey Application

The actual survey takes place in a second application. This application is loaded on the number that you specified in the **Setup Survey** block.

A survey application is created with the application type **Default** and behaves in the same way as other applications. You can use **User Input** blocks to ask questions and record responses. Each **User Input** block stores the response from the caller for reporting.

Tip

As survey applications are **Default** type applications, you can use **Route Call** and various other blocks to direct the call if the customer's survey responses meet certain criteria. For example, if the caller inputs a low satisfaction score, you can use a **Segmentation** block to check for low satisfaction scores and a **Route Call** block to route the call to an agent to follow up on the customer's concerns.

Example

The following example demonstrates how to create a simple survey application.

First, create a new application of type **Default** to provide the survey.

In the application, create a series of variables to hold the questions and answers for your survey. In the example below, **question1** and **question2** hold the question that the survey asks the caller, and **survey_iAnswer1** and **survey_iAnswer2** holds the answer from the caller.

Properties - Initialize



This block or phase is typically used to setup variables for the application and initialize them. Assign blocks can be used to calculate expressions and assign their results to variables in this phase.

1 User Variables 🛛 📾 System Variables

Specify User Variables. String values must be surrounded by single quotes.

+ Add Variable

Name	Default Value	Private	Delete
question1	'Was the agent able to answer your question? Press 1		â
survey_iAnswer1			Ŵ
question2	'How would you rate the agent on a scale of 1 to 5?'		Ē
survey_iAnswer2			Ŵ

Designer also provides standard variables, which you can view in the **System Variables** tab, that you can use if your company uses standard reporting. For example, instead of using **survey_iAnswer2** to hold the feedback score for the agent, we could instead use **survey_iAgentScore**.

Variable	Editable	Purpose
survey_sOffer	No	Specifies whether a survey was offered, accepted, or rejected. This variable is set by the Setup Survey block.
survey_iRecommendScore	Yes	A rating (on a scale from 0 to 10) that indicates if the company, product, or service is recommended. This variable is used for calculating the Net Promoter Score (NPS).
survey_iAgentScore	Yes	Specifies a user satisfaction score for the agent (if this question is asked in the survey).
survey_iCompanyScore	Yes	Specifes a user satisfaction score for the company (if this question is asked in the survey).
survey_iCallScore	Yes	Specifies a user satisfaction score for the entire call (if this question is asked in the survey).
survey_iProductScore	Yes	Specifies a user satisfaction score for the product (if this question is asked in the survey).
survey_sQ110	Yes	You can create these variables (1-10) to store string -type survey responses that will be used for reporting. (Use the naming convention as shown. For example, <i>survey_sQ1</i> , <i>survey_sQ2</i> , and so on.)
survey_iQ110	Yes	You can create these variables (1-10) to store integer -type survey responses that will be used for reporting. (Use the naming convention as shown. For example, <i>survey_iQ1</i> , <i>survey_iQ2</i> , and so on.)

Important

Survey answer variables must use the following naming convention:

- The name must have the prefix survey_.
- The next character must indicate the data type (for example, i for integer or s for string).
- Example: survey_iAnswer.

Next, we add a series of User Input blocks and Milestone blocks to the **Self Service** phase. The **User Input** block asks the survey question and the **Milestone** block reports the survey answer.



In each **User Input** block, select the question variable in the **Prompts** tab and answer variable in the **Results** tab.

Properties - Q1 - Was your issue resolved?

	-	
U		J
	Ŧ	/

This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

•) Prompts		nput	🌲 ASR Settings	🗰 DTMF Se	ttings	Retry	
💾 Results	M	ilestor	ie				
Specify prompts t + Add Prompt	to play to	o collect	user input				
Туре	Var?	Value			Play as	Actio	ns
TTS •		que	estion1	•	text	▼ 1	ا
Prompts must	finish co	omplete	ly before users can prov	ide input			

Timeout - wait for 5 s before assuming that no input was received.

Properties - Q1 - Was your issue resolved?							
This block is used to ask a question and collect input from the user. It provides options for multiple attempts.							
•))	Prompts	🏢 Input	🌲 ASR Settings	III DTMF Settings	Retry		
🖰 Results		Milestone					
Store output result (either DTMF entered digits, or the ASR utterance) in this variable							
survey_iAnswer1							

In each **Milestone** block, select the question and answer to send to reporting.

Properties - Q1 - Report

This block is used to record a milestone in reports including surveys.

lilestone
question1
use variable
filestone Type
Survey
urvey Milestone Properties
urvey Question 🗹
question1
orresponding Answer 🗹
survey_iAnswer1

The following graphics show the process for survey question two, using the standard answer variable **survey_iAgentScore**.

Properties - Q2 - Agent Feedback



This block is used to ask a question and collect input from the user. It provides options for multiple attempts.

•) Prompts 🗰 Input		nput	ê /	ASR Settings	III DTMF Set	ttings	🌒 Ret	ry
🖰 Results 📕 Milestone								
Specify prompts to play to collect user input + Add Prompt								
Туре	Var?	Value				Play as		Actions
TTS 🔻		ques	tion2		۲	text	۲	↑ ↓ 🖬
Prompts must finish completely before users can provide input								
Timeout - wait for 5			s before assuming that no input was received.					
Properties - Q2 - Agent Feedback								
This block is used to ask a question and collect input from the user. It provides options for multiple attempts.								
•)) Prompts	⊞ I	nput	ê /	ASR Settings	III DTMF Se	ttings	🔷 Ret	iry
🖰 Results 🔲 Milestone								
Store output result	(either	DTMF er	tered	I digits, or the AS	SR utterance) in this	s variable		
survey_iAgentScore								

Properties - Q2 - Report



Milestone	
question2	
use variable	
Milestone Type	
Survey	•
Survey Milestone Properties	
Survey Question 🗹	
question2	•
Corresponding Answer 🗹	
survey_iAgentScore	•