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PRODUCT GUIDE

Informiam Proactive Business Management Suite™

Frontline Advisor™ Release 3.3

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1 Frontline Advisor Overview

1.1 Solution Overview

Frontline Advisor™ is specifically designed to help contact center supervisors improve their management of agents - in real time. Each supervisor can focus on the most important Key Performance Indicators (KPIs) for each agent on their team. Supervisors are alerted as soon as agent performance is trending towards a situation requiring immediate action (good or bad). Therefore, agents can finally receive timely coaching to keep doing the things they are doing well and to improve in the areas where they are not doing so well.

Call center supervisors are extremely busy people with many things competing for their time and attention. Without turning them into screen watchers, Frontline Advisor advises supervisors on who to coach, when to coach, and why to coach. It saves time for supervisors, and then ensures they spend that time wisely, thus helping to optimize the performance of agents.

The essential capabilities of Frontline Advisor are the following:

- Presentation of real-time agent metrics, states, and KPIs
- Presentation of real-time team metrics and KPIs
- Performance alerts based on current trending
- Threshold alerts based upon ranges of values
- Annotation of alerts for use in performance management activities
- Presentation of current agent alerts
- Presentation of team alert history
- Console personalization, per user
- Multi-level monitoring hierarchy
- Monitoring hierarchy importer
- Link to and from external applications
- Hierarchical inheritance of threshold and rule parameters
- Hierarchical rollup of agent and team metrics and KPIs

1.2 Functionality Overview

An instance of Frontline Advisor is made available to each user to monitor one or more groups of agents. A multi-level monitoring hierarchy defines the agent groupings, as well as which users can monitor which groupings. The user tells Frontline Advisor which group in the monitoring hierarchy to focus on. The user can switch the focus from one group to another.

The user is presented with real-time agent-specific information in a succinct row-and-column format. The agent information is rolled into team information as well. The agent and team information rolls up through all levels of the monitoring hierarchy. Colors and other indicators are used to quickly draw attention to items of significance. Administrator-configured business rules, including thresholds, suggest which items are significant. Rules are used to issue alerts, further focusing supervisor attention on agent performance and providing details as to what behavior produced each alert. Thresholds and rules are always in effect; always evaluating the most current information. Rules and threshold parameters are stored and inherited throughout the monitoring hierarchy.

Supervisors can "stop by" their Frontline Advisor workstation every now and then to quickly view the alerts that have been issued for agents on their team. Users can also navigate to Frontline Advisor from external applications, as well as navigate from Frontline Advisor to external applications, using World Wide Web URLs.

When a supervisor displays the details of an alert, an annotation to the alert can be entered and saved. This is referred to as saving a note. When a supervisor saves a note with an alert, that alert is marked as cleared. Each alert has a status of either cleared or uncleared. Only the existence of uncleared alerts affects the attention-getting aspects of the user interface. Alerts are saved into the Frontline Advisor history, along with the timestamp, other alert details, and the saved note if there is one. The history of alerts is referred to as the Alert Log, which can be viewed and printed.

1.3 User Interface Overview

Manager Console

The Manager Console is displayed within a tab in the Informiam Browser.

The Manager Console presents information for each agent who is a member of the currently selected team. The user may choose to show or hide various types of information such as metrics, states, or alerts. When a user selects a group higher in the monitoring hierarchy, the Manager Console shows the agent and team information for all of the subgroups below that group in the hierarchy.

The indications of threshold and alert events are clearly identifiable in the Manager Console. The user can quickly determine agent and team values that are out of range, and agent performance requiring attention. The higher level rollups provide the same at-a-glance focus of attention all the way up the monitoring hierarchy.

The alert details display shows information regarding the alerts of a particular agent. The user can clear an alert by inputting text to be saved with the alert. Usually, the text is used to describe how the alert event was dealt with such as actions taken or conversations held between the supervisor and the agent.

Informiam Icon

The Informiam icon is a separate window that consumes minimal space on the screen. The sole purpose of the Informiam icon is to indicate when there is at least one active alert requiring attention. The Informiam icon is launched from the Manager Console, and it is viewable whether or not the Manager Console is minimized.

Monitoring Hierarchy View

The Monitoring Hierarchy View shows the multi-level monitoring hierarchy as a tree structure of teams, groups of teams, groups within groups, and so on, all the way to the single all-encompassing group at the top. The user navigates throughout the tree by opening and closing the various groups. The rollups for a group are shown next to the group itself. The user can choose to monitor all the teams under the currently selected group in the tree.

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Teams View

The Teams View shows a Team Bar for each team the user is monitoring. Each Team Bar shows the status and performance for each agent on the team.

Agent Alerts View

When an agent is selected in a Team Bar, the agent's alert details are shown in the Agent Alerts View. The user can leave a note in the alert details, which clears the alert. Alert details, including notes, are stored as part of an agent's performance history.

Team Alerts View

The Team Alerts View shows all current-day alerts, cleared or uncleared, for all agents on the currently selected team. The alerts can also be printed, allowing a supervisor to carry around and use as a coaching tool with agents.

External applications (such as balanced scorecards or agent performance management systems) can query Frontline Advisor to receive alert information. The queries can specify times, dates, agents, and teams.

Admin Console

The Admin Console is used by the Frontline Advisor administrator to perform the following tasks:

- Define thresholds and enable/disable them for teams and groups
- Define rules and enable/disable them for teams and groups
- Set up and maintain the network of values for inheritance throughout the multi-level monitoring hierarchy
- Adjust global settings used by the application

1.4 Architecture Overview

Frontline Advisor is an add-on module to the Informiam Proactive Business Management Suite™. Figure 1 shows a high-level schematic.
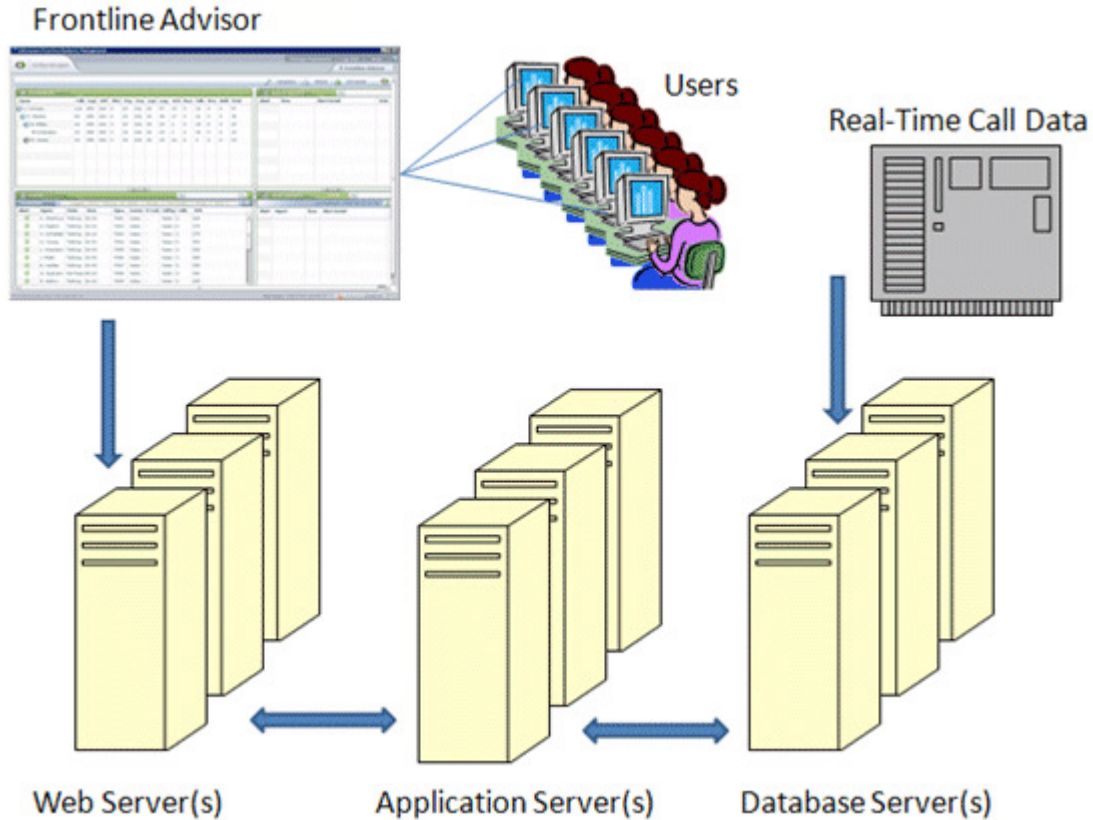

Figure 1: High-Level Schematic

Frontline Advisor supports single- and multi-site call centers whose infrastructure is based upon the Cisco Intelligent Call Management and/or Cisco IP Contact Center systems. Frontline Advisor supports these systems in a full TDM configuration, full IPCC (virtual) configuration, or a hybrid configuration (some sites TDM and some IPCC).

2 Frontline Advisor Functionality

2.1 Alerts and Notes

An agent's performance can trigger a predefined rule, issuing an alert. If an alert is active, a red alert indicator appears next to the agent's name.

The supervisor user can select the agent and view the details of the alert(s) for that agent.

Each alert provides a link allowing a supervisor to enter text into a note. Supervisors use notes to document their handling of the alert. When a supervisor opts to save a note, the alert becomes cleared.

All alerts (cleared and uncleared, with or without notes) are stored into the history for each agent in Frontline Advisor. The Agent Alerts View can be used to view and print the history of alerts.

2.2 Thresholds and Rules

Thresholds and rules are continuously in effect, always evaluating metrics, issuing alerts, and helping to focus the attention of supervisors onto the most important issues effecting their agents' performance and behavior. Each threshold checks one measured value at a point in time and triggers when the value falls within a pre-set range. Rules add another layer of sophistication by calling trigger functions that do more than simple range checking at points in time. Rules can count events throughout an interval of time, which allows them to trigger on the frequency of events.

Thresholds are defined and enabled/disabled at any level in the monitoring hierarchy. Thresholds may be set for both agent metrics and team metrics. Inheritance can be configured to customize parameter values to the agent level, team level, or any level.
Rules are defined and enabled/disabled at any level as well, however rules only trigger on agent behavior. Inheritance for rules works the same as inheritance for thresholds, allowing customization.

When a threshold is exceeded, the triggered threshold changes the background color of the appropriate text in the Manager Console to red or yellow. When a rule is triggered, the rule creates an alert and posts it to the Manager Console.

2.3 Metrics

Appendix A contains a list of the metrics available within Frontline Advisor. Not all of the available metrics are viewable in the Manager Console because they are used in internal computations. The appendix provides the following information for each metric:

- **Value/Metric:**   the name of the metric or value being measured
- **Description:**   explanatory text further describing the metric
- **Identifier:**   name for the metric in the Frontline Advisor business object model
- **Calculation:**   the definition of how the metric is calculated
- **ICM Source:**   a description of the source data location in the ICM tables
- **Type:**   the data type of the metric
- **Refresh:**   how often the metric is refreshed from ICM/IPCC
- **Accum:**   a short-hand notation describing how Frontline Advisor accumulates the metric over multiple intervals

2.4 Custom Metrics

Custom metrics are designed to allow users to track metrics specific to their own business applications. Creation of a custom metric requires the services and skills of a Genesys Professional Services Representative. There is a maximum of ten (10) base metrics whose values must be numeric. The data will always be of the type double/float with the following properties:

1. The metric ID
2. The metric name
3. Whether it's a base metric
4. Whether the metric is an absolute number, an average, or a percentage
5. The metric value: for a base metric, this will be the name of the column holding the imported value in the data staging area; for a non-base, or calculated metric, this will be a simple formula describing the calculation of the metric's value based on other metrics (base or non-base). The formula for a non-base metric will be assumed to be valid and have no circular dependencies.
6. Whether the metric can have thresholds applied to it and the default global values for each threshold.

The Administrative UI will determine the metrics that can have thresholds associated with them and will include those in the Team and Agent panes to allow changing threshold values. The default global values for the thresholds will be turned off by default, just as they are for other metrics.

Custom metrics cannot be included in Rule definitions.

3 System Administration

3.1 Configuration Overview

The administrator sets three system settings to control various calculations. The settings are the following:

Agent State Interval: this is the frequency that Frontline Advisor reads agent state information.

Agent Performance Interval: this is the frequency that Frontline Advisor reads agent performance information.

Performance Calculation Interval: this is the duration of time that Frontline Advisor uses for calculating averages, counts, and maxima. These calculations are then sent to the threshold checking component.

Agent Name Visibility: setting this to off hides agent names and agent ID's throughout the user interface. Some industries and/or countries require this setting.

3.2 Monitoring Hierarchy

The monitoring hierarchy stores two types of information: Groups and Monitors. Groups can be groups of agents (also known as teams), or groups of groups, all the way to the root of the monitoring hierarchy which is one all-encompassing group. Monitors are people that are defined to have rights to monitor groups in the hierarchy.

The monitoring hierarchy is stored in a separate location, and then imported into Frontline Advisor on a daily schedule that is defined by the administrator.

3.3 Users

Authentication is tied to the monitoring hierarchy, which in turn is tied to the authentication source of the Informiam Browser. Any user correctly defined in the monitoring hierarchy will have login permissions for Frontline Advisor.

3.4 Thresholds and Rules

Frontline Advisor contains five types of thresholds and rules. The tables throughout this section summarize the five types. As a reminder, Section 2.2 explains that there are two versions of thresholds: those triggered by agent metrics and those triggered by team metrics. The parameter values for thresholds and rules are stored throughout the monitoring hierarchy and controlled by inheritance.

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

The five types, how they trigger, and what actions they perform

3.4.1 Templates

AgentOrTeam	has	MoreThan	N	AgentCallsHandled	in the past	Interval
				AgentCallsTransferred		
		LessThan		TeamCallsHandled		
				TeamCallsTransferred		

Type1: Thresholds that trigger on the count of an enumerable event

AgentOrTeam	has	AgentAvgHandleTime	LongerThan	S	seconds in the past	Interval
		AgentAvgTalkTime				
		AgentAvgWrapTime				
		AgentLongestCallTime				
		AgentLongestWrapTime				
		TeamAvgHandleTime	ShorterThan			
		TeamAvgTalkTime				
		TeamAvgWrapTime				
		TeamLongestCallTime				
		TeamLongestWrapTime				

Type2: Thresholds that trigger on the duration of a time-measured value

Agent	has been in the	AgentOnHold	state	LongerThan	S	seconds in the past	Interval
		AgentNotReady					
		AgentReady					
		AgentTalking					
		AgentWorkNotReady		ShorterThan			
		AgentWorkReady					

Type3: Thresholds that trigger on the duration of an agent state

Agent	has	MoreThan	N	AgentCallsTransferred	in the past	Interval
		LessThan		AgentCallsHeld		

Type4: Rules that trigger on how calls are handled

Agent	has	MoreThan	N	calls with	AgentHandleTime	LongerThan	S	seconds in the past	Interval
		LessThan			AgentWrapTime	ShorterThan			

Type5: Rules that trigger on the duration of calls or call segments

3.4.2 Examples of Thresholds and Rules

Type	Class	Sample Template Values
1	Threshold	An Agent on TeamBilling has LessThan 5 AgentCallsHandled in the past 20 minutes.
1	Threshold	An Agent on TeamSupport has MoreThan 3 AgentCallsHandled in the past 10 minutes.
1	Threshold	TeamCredit has LessThan 50 TeamCallsTransferred in the past 10 minutes.
2	Threshold	TeamBilling has TeamAvgTalkTime LongerThan 240 seconds in the past 30 minutes.
2	Threshold	An Agent on TeamSupport has AgentAvgWrapTime ShorterThan 45 seconds in the past 20 minutes.
2	Threshold	TeamCredit has TeamLongestCallTime ShorterThan 420 seconds in the past 20 minutes.
3	Threshold	An Agent on TeamBilling has been in the CallHeld state LongerThan 120 seconds in the past 10 minutes.
3	Threshold	An Agent on TeamSupport has been in the NotReady state ShorterThan 30 seconds in the past 30 minutes.
4	Rule	An Agent on TeamCredit has MoreThan 2 AgentCallsTransferred in the past 20 minutes.
4	Rule	An Agent on TeamSupport has LessThan 3 AgentCallsHeld in the past 30 minutes.
5	Rule	An Agent on TeamBilling has MoreThan 5 calls with AgentHandleTime ShorterThan 8 seconds in the past 30 minutes.
5	Rule	An Agent on TeamSupport has LessThan 3 calls with AgentWrapTime LongerThan 45 seconds in the past 30 minutes.

Appendix A: Metrics

Value / Metric	Description	Identifier	Calculation	ICM Source	Type	Refresh	Accum
Agent State	One of fifteen real-time states an agent can be in	AgentState		Agent_Real_Time. AgentState	String	10 Seconds	None
Agent Current Skill Group	Identifies the skill group for the call the agent is currently handling	CurrentSkillGroup		Agent_Real_Time. SkillGroupSkillTargetID	String	10 Seconds	None
Agent Current Application	Identifies the application for the call the agent is currently handling	ApplicationServices		SkillGroup. PeripheralName	String	10 Seconds	None
Agent Reason Code	User-defined code representing the reason for the agent's most recent state change	ReasonCode		Agent_Real_Time. ReasonCode	String	10 Seconds	None
Agent Inbound Calls Handled List	The list of calls handled (answered and closed) by an agent during a period of time	AgentCallsHandledList	List of (CallDisposition = 13) for an agent during TimePeriod	Termination_Call_Detail. CallDisposition	List of Calls	10 Minutes	List
Agent Inbound Calls Handled	The number of inbound calls handled (answered and closed) by an agent during a period of time	CallsHandled	Count of calls in AgentCallsHandledList		Int	10 Minutes	Σ ICH
Agent Total Talk Time	Total talk time for the calls handled by an agent during a period of time	TotalTalkTime	Sum of TalkTime for AgentCallsHandledList	Termination_Call_Detail. TalkTime	Time	10 Minutes	Σ TTT
Agent Total Wrap Time	Total after call work time for the calls handled by an agent during a period of time	TotalWrapTime	Sum of WorkTime for AgentCallsHandledList	Termination_Call_Detail. WorkTime	Time	10 Minutes	Σ TWT
Agent Total Handle Time	Total handle time for the calls handled by an agent during a period of time	TotalHandleTime	Sum of (TotalTalkTime TotalHoldTime TotalWorkTime)		Time	10 Minutes	Σ THaT
Agent Average Talk Time	An agent's average talk time for the calls handled by that agent during a period of time	AvgTalkTime	Sum of TotalTalkTime divided by CallsHandled		Time	10 Minutes	$\dfrac{\Sigma\ TTT}{\Sigma\ ICH}$
Agent Average Wrap Time	An agent's average after call work time for calls handled by that agent during a period of time	AvgWrapTime	Sum of TotalWrapTime divided by CallsHandled		Time	10 Minutes	$\dfrac{\Sigma\ TWT}{\Sigma\ ICH}$
Agent Average Handle Time	An agent's average handle time for the calls handled by that agent during a period of time	AvgHandleTime	Average of TotalHandleTime		Time	10 Minutes	$\dfrac{\Sigma\ THaT}{\Sigma\ ICH}$
Agent Calls Transferred	The number of times an agent performs a call transfer during a period of time	TotalCallTransferred	Count of (CallDisposition = 24) for an agent during TimePeriod	Termination_Call_Detail. CallDisposition	Int	10 Minutes	Σ TCT
Agent Longest Wrap	The longest amount of time an agent spends doing after call work during a period of time	LongestWrap	Max of WorkTime in AgentCallsHandledList	Termination_Call_Detail. WorkTime (However, using a rule is a substitute)	Time	10 Minutes	Max

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Value / Metric	Description	Identifier	Calculation	ICM Source	Type	Refresh	Accum
Agent Longest Call	The handle time of the longest call handled by an agent during a period of time	LongestCall	Max of (Sum of (TalkTime HoldTime WorkTime) in AgentCallsHandledList)	Termination_Call_Detail. {TalkTime, HoldTime, WorkTime}	Time	10 Minutes	Max
Team Inbound Calls Handled List	The list of calls handled (answered and closed) by a team during a period of time	TeamCallsHandledList	List of AgentCallsHandledList for each agent on team		List of Calls	10 Minutes	List
Team Calls Handled	The number of inbound calls handled (answered and closed) by a team during a period of time	TeamCallsHandled	Count of calls in TeamCallsHandledList		Int	10 Minutes	Σ TCH
Team Total Talk Time	Total talk time for the calls handled by a team during a period of time	TeamTotalTalkTime	Sum of TotalTalkTime for each agent on team		Time	10 Minutes	Σ TTT
Team Total Wrap Time	Total after call work time for the calls handled by a team during a period of time	TeamTotalWrapTime	Sum of TotalWrapTime for each agent on team		Time	10 Minutes	Σ TWT
Team Total Handle Time	Total handle time for the calls handled by a team during a period of time	TeamTotalHandleTime	Sum of TotalHandleTime for each agent on team		Time	10 Minutes	Σ THaT
Team Average Talk Time	A team's average talk time for the calls handled by that team during a period of time	TeamAvgTalkTime	TeamTotalTalkTime divided by TeamCallsHandled		Time	10 Minutes	$\frac{\Sigma\,TTT}{\Sigma\,TCH}$
Team Average Wrap Time	A team's average after call work time for calls handled by that team during a period of time	TeamAvgWrapTime	TeamTotalWrapTime divided by TeamCallsHandled		Time	10 Minutes	$\frac{\Sigma\,TWT}{GTI}$
Team Average Handle Time	A team's average handle time for calls handled by that team during a period of time	TeamAvgHandleTime	Average of TeamTotalHandleTime		Time	10 Minutes	$\frac{\Sigma\,THaT}{\Sigma\,TCH}$
Team Calls Transferred	The number of times a team performs a call transfer during a period of time		Sum of TotalCallTransferred for each agent on team		Int	10 Minutes	Σ TCT
Team Longest Wrap	The longest wrap time within the calls handled by a team during a period of time		Max of LongestWrapTime for all agents on team		Time	10 Minutes	Max
Team Longest Call	The longest handle time within the calls handled by a team during a period of time		Max of LongestHandleTime for all agents on team		Time	10 Minutes	Max

Note: The values for Refresh and TimePeriod can be modified by the Administrator, however they should not be any less than the values shown.

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