Contact Center eBook

Verint Automation Handbook

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Verint Automation Ideas Ready for You to Implement Today!

Automation within the Verint platform comes in all shapes and sizes. Any task or feature that can execute a repeated set of processes saves your organization time, reduces operational costs, and can potentially improve customer experiences. Group Elite helps contact centers deploy Verint solutions and during our projects, our team looks for ideas like these to help you automate the mundane. Review each idea and let us know how we can help you.

- **WFM** – automate time-off management
- **QM** – automate the delivery of interactions for evaluations
- **Platform** – automate agent tasks through the mobile app
- **QM** – automate metadata tagging of interactions through the desktop
- **Speech** – automate agent pop-ups using real-time speech analytics
- **AQM** – automate the evaluation process
- **WFM** – automate manual updates of employee schedules
- **QM** – automate calibration delivery on-the-fly
- **Platform** – automate the delivery of reports to users
- **Platform** – automate the WFO Suite sign-in process

Automation Idea #1
WFM – Automating Time-Off

First question from a new agent: "What is my schedule?"

Second question from a new agent: "How do I request time off?"

Agents will always ask about time-off and contact centers often have several processes to manage time off rules and approvals. The good news for you is that there are several Time Off Categories within the Verint WFM platform that can help ease your workload. Time-off that is guaranteed by law and should be ripe for automation. Consider automation for time-off requests for:

Civil Service Leave
Do you have agents in the Military Reserves? Keep in mind that any employee who is called to military service, training or reserve duty, who is not temporary is covered by the federal law and may be guaranteed time-off. Consider setting up a rule to transform these into self-service requests and agents will get approval faster than ever.

Jury Duty Summons
The same is often true for jury duty. Fast-track these approvals and make approval faster than standard time-off.

FMLA/Bereavement Leave
Unfortunately, there are medical issues that happen in life and even funerals to attend. Make it easy for an agent to request the time off. Implement auto approvals and then make getting it approved one less thing the agent (and you) have to worry about.

Same Day Sick Time Reporting via Mobile App
Auto approving same day requests submitted via the mobile app is easy! Skip ahead to the mobile app automation idea for more tips.

Unfortunately, automation can't get rid of the required paperwork for some types of leave; you'll still need to ensure that a post approval manager "paperwork" validation step is included in any of these processes.

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Automation Idea #2
QM – Automating the Delivery of Interactions for Evaluation

On average it takes an evaluator 1-5 minutes to find an appropriate interaction to evaluate. Fumbling through short calls and transfers can be time consuming and frustrating. One of the most underutilized features within the Verint Quality Monitoring application is the "Shared Inboxes" feature. A Shared Inbox can be setup for various groups of evaluators such as supervisors, coaches, and quality teams. These inboxes allow you to target the best and ideal calls to meet your quota to fulfill a set of work by:

- **Fulfill quotas per employee**
- **Fulfill quotas per rule**
- **Fulfill quotas per rule per employee**

A Shared Inbox serves interactions to your evaluators, includes the criteria you choose (call length, topic, holds, screen time, etc.) and builds evaluator efficiency and consistency.

Shared Inboxes automate the quota process and eliminate manual tracking of required evaluations.

BONUS: Use speech analytics to really pinpoint and identify call types and problematic topics that require coaching. Don't just monitor and coach to random topics; find the call types that need work and serve them up!

Figure 1 - Verint Shared Inbox Settings

Automation Idea #3
Platform – Automating Tasks in the Mobile App

We all have devices... Check out the Verint Mobile App and make your job easier!

Verint's mobile app has built in functionality for the agents & managers to not only see who is working today but also help the contact center run more efficiently.

Agents unable to make it to work now have a fast, easy way to "call out" instead of emailing their manager or the WFM team, or leaving a voicemail, an agent can simply submit a time off request on their own device from home.

Figure 2 - Verint Mobile App

Time-Off Requests
Agents (& managers too) can request time off via the mobile app. Couple time-off requests with auto-processing and you just created a huge automation win for not only the agent, but also your WFO team.

Schedule Changes
Gone are the days that agents need to be at work or on the phone with their supervisor to request a schedule change or swap. Let your agents request via the mobile app & get the answer quick with auto-processing. No matter the results of the request, it saves you time and the agents will love it!

Performance Management
Give your agents the ability to monitor their performance via the app as well. The Verint Mobile App displays Score Card Metrics in real-time and allows an agent to focus on their opportunities for improvement.

Automation Idea #4
Platform – Automating Desktop Triggers & Tags

Today you search for interactions by date, time, agent, CTI data, and other basic metadata. Have you ever had a "parameter" you wish you could search by? Perhaps call type? Disposition? Frequent Flyer Status? State? Country? Ticket Number? Order number?

Adding these values to an interaction may not be as difficult as you think. There are two scenarios in which data can be taken from an agent's desktop and attached to an interaction.

If you are **NOT** currently using Verint Desktop Analytics for PCI Compliance Redaction

Verint Desktop and Process Analytics (DPA) is required to pull data from the agent desktop. Talk with your Group Elite account team, Verint Sales, or Verint Authorized Reseller about a demo of the Verint DPA solution.

If you **ARE** currently using Verint Desktop Analytics for PCI Compliance Redaction

Good news! The technology you use today to find an on-screen trigger for PCI Compliance is the same technology that could retract a field from the agent screen and attach the parameter to the recording.

Imagine that this CRM screen is open during an interaction. Fields that could be attached to the interaction could be:

- Priority of Call
- Source
- Ticket ID
- Ticket Status
- …and many more

Adding these fields improves search time, improves Shared Inboxes (see Tip #2), and provides granular insights.

Figure 3 - Sample Agent CRM Screen

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Automation Idea #5
Automating Guidance with Real-Time Speech Analytics Pop-Ups

Real-Time Speech Analytics is an add-on to Verint Interaction Recording and works together with Speech Analytics and Verint Desktop and Process Analytics (DPA). When listening to interactions in real-time, DPA identifies triggers and can be used to "pop-up" guidance to the agent on the screen.

Automate your guidance efforts for:

- Regulatory Compliance
- Customer Retention
- Improving Sales through Cross-Selling
- Directed Coaching

Automate your guidance efforts for screen callouts that coach the agent in real-time, reduce errors, prevent re-work, help avoid callbacks, alert supervisors of "sticky situations," and mitigate risks.
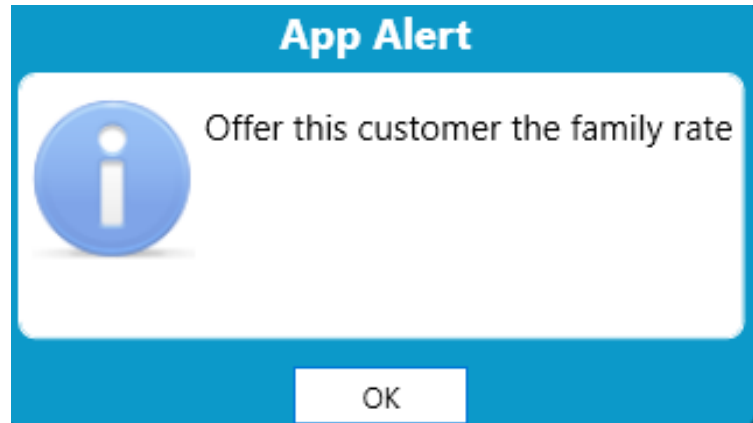

Figure 4 - Guidance Pop-Up

Did you know?

Real-Time Speech Analytics is extremely accurate and fast, leveraging phonetic recognition along with the full transcription of calls. It can also apply rules based on sentiments, non-linguistic attributes, employee activities on the desktop, CTI data, and employee skills.

Automation Idea #6
AQM – Automating Evaluations

In most cases, organizations listen to less than 1% of interactions. This sample size can create blind spots in your quality monitoring efforts as well as agent dissatisfaction through cherry-picking interactions for coaching.

Verint Automated Quality Management (AQM) can automate the whole quality management process and help you listen to 100% of voice and text interactions. By transcribing the calls in the powerful AQM transcription engine, calls are processed, and rules are applied that generate scores.

Automating the evaluation process can help you:

- Create statistically significant data
- Manage compliance risks
- Coach directionally vs. situationally
- Score objectively
- Shift resources to coaching
- Improve customer experience

Not sure how AQM rules work?

Have no fear. Let the team from Group Elite evaluate (no pun intended) your current forms and questions for what would be best to transition to AQM. Let our team of QM experts help you; they have transitioned many customers into AQM by both embedding AQM questions into existing forms and fully automating entire evaluation forms.

Figure 5 - Verint AQM

Now sure how it would impact your QM program?

Learn from the best. Use Group Elite as a best practice resource to understand the role your quality team will play on new coaching processes and delivering results to the frontline.
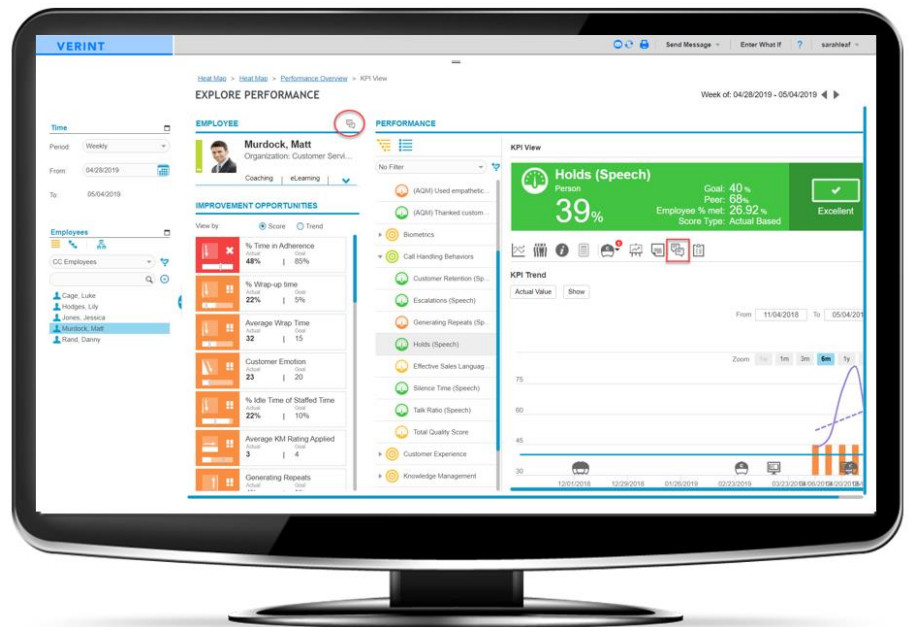
Automation Idea #7
WFM – Automating Schedule Updates

If your organization is using a payroll integration with Verint WFM, then EliteSync is for you! Many organizations must manually update the scheduled hours for each agent prior to sending the data to payroll. EliteSync automates schedule updates and is the industry's first cloud-based contact center payroll automation tool.

Manage Employee Conditions - EliteSync manages the employee conditions based on real-time adherence data, thus updating the employee's schedule in Verint Workforce Management.

Automate Exceptions - EliteSync automates exceptions through your existing integration to a payroll system.

Improves Accuracy - EliteSync improves the accuracy of your contact center payroll to avoid over-pay, under pay, improper shift differentials.

Improves Efficiency of your WFM Team - EliteSync automates a manual process and eliminates work for your WFM team, a process that would normally require several WFM analysts daily.
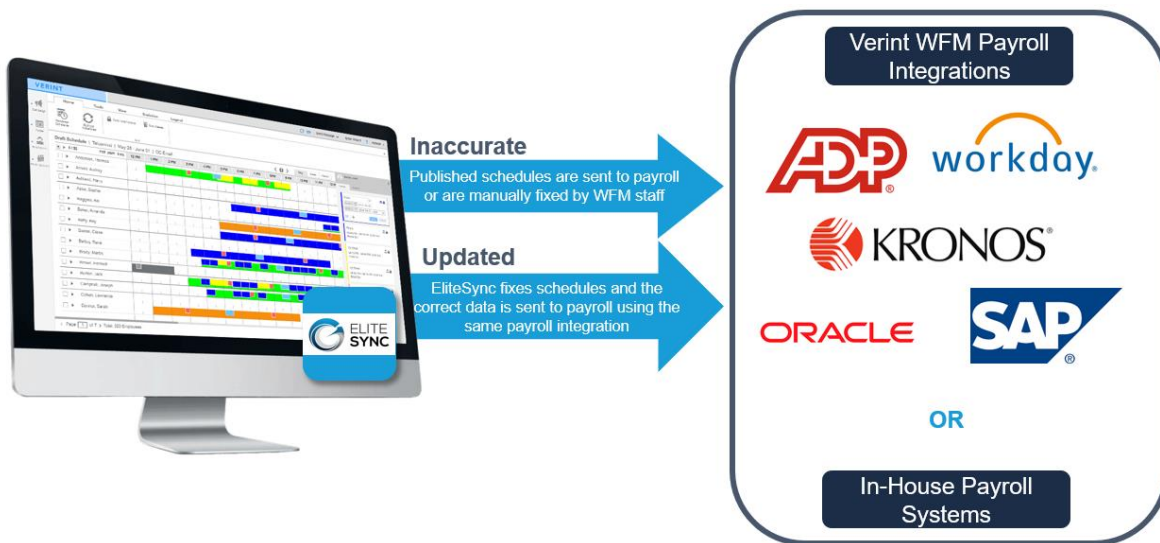

Figure 6 - EliteSync Methods and Integrations

☑   EliteSync works with existing integrations with Kronos, ADP, Oracle, SAP and more

☑   Leverages real-time adherence data to support pay-per-minute models regardless of the payroll integration.
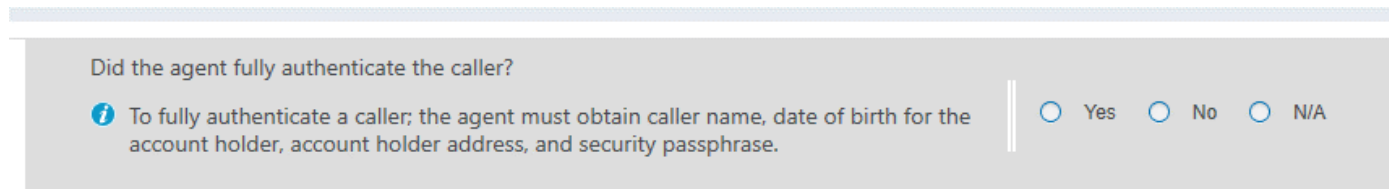
☑   Automates your WFM schedule update process

EliteSync is a solution offered by Group Elite and connects to your existing Verint WFM system. **Email us today** to learn more.

Automation Idea #8
QM – Automating On-the-Fly Guidance

Adding simple instructional text to each of your QM questions will reduce confusion and improve employee satisfaction.

Did the agent fully authenticate the caller?

ⓘ To fully authenticate a caller; the agent must obtain caller name, date of birth for the account holder, account holder address, and security passphrase.

○ Yes   ○ No   ○ N/A

Figure 7 - Verint Instructional Text on a QM Question

The instructional text (how to authenticate a caller) is visible during evaluation, during coaching, and takes the guesswork out of scoring.

Calibration sessions may still be required in most cases, but adding instructional text to the form also eliminates the back-and-forth discussion or the hassle of looking up question definitions in a 3rd-party tool, document, sticky-note, or database.

Calibration and Guidance Tips

1 Get started TODAY and find your baseline

2 Define the role of the facilitator in advance

3 Complete calibration session in advance of in-person meetings

4 Follow-up and provide feedback quickly

5 Improve calibration by using "instructional text" shown above

Automation Idea #9
PLATFORM – Automating Report Delivery

"I need that report in my inbox every Monday before my staff meeting," shouts the busy contact center director. Sound like you? Sound like your director? Then take advantage of the report delivery automation features inside your reports.

Instead of running the report, saving it locally, and then emailing to a person or distribution list, click the "Recurring" box on the report parameters.

Figure 8 - Verint Scheduled Reporting

Choose the report, select the frequency, pick the output format, and then set the person or distribution list. Use this to send reports hourly, daily, weekly, monthly, or the first Monday of the month.
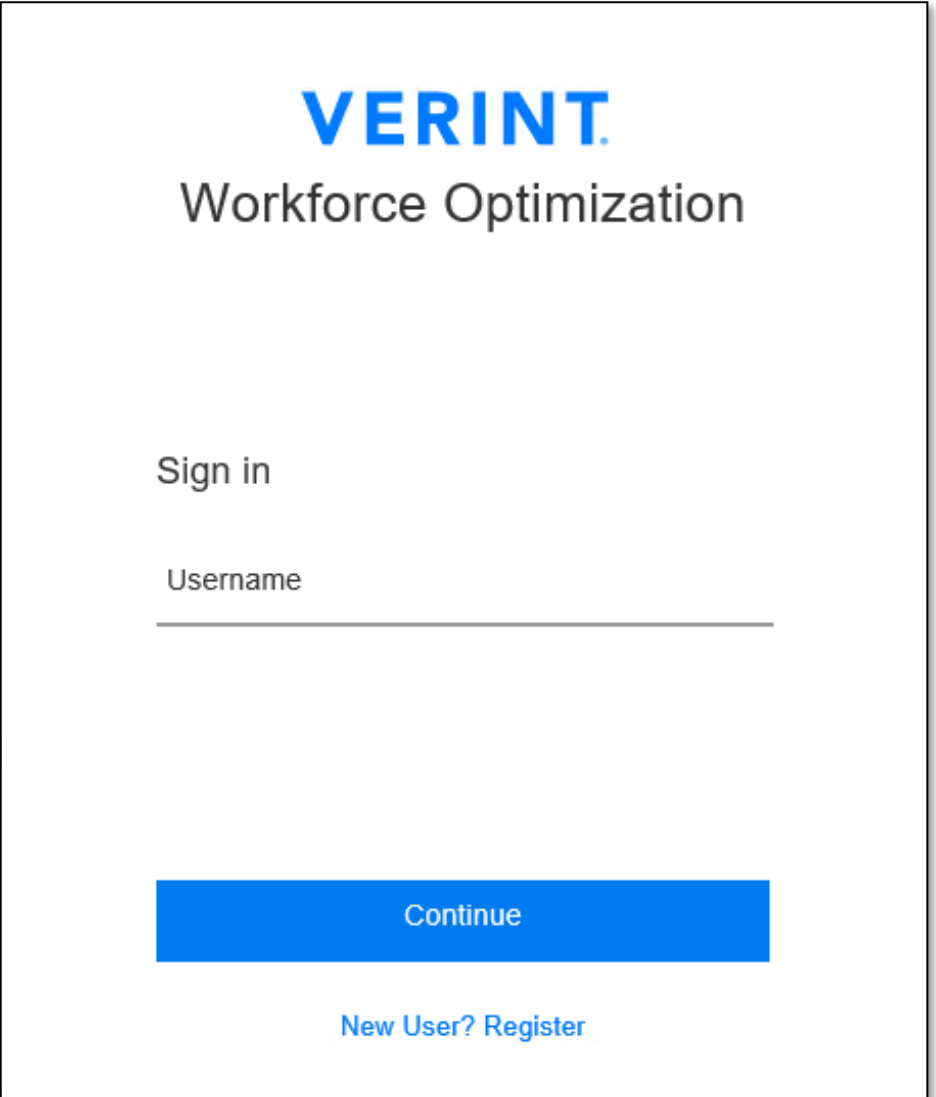
Automation Idea #10
PLATFORM – Automating WFO Suite Sign-in

Group Elite recently polled a set of Verint users and found that one-third of companies are still using native username/password authentication with their Verint platform. This requires that agents, QM staff, and administrators must maintain a separate password for their Verint login.

A small configuration option available to your administrator could enable single-sign-on authentication much like you use for your email or other intranet tools. This setting is called "LDAP/SSO" and will use the domain/username of each user to log into the Verint system.

Ask your administrator today about using LDAP/SSO and never forget your Verint password again.

VERINT.
Workforce Optimization

Sign in

Username

Continue

New User? Register

Figure 9 - Verint Sign In Screen

GROUP ELITE SUMMARY
Our Experience is Your Advantage

VERINT.
Global Strategic Partner
Complete Services Certification

Founded in **2012**

Extensive experience supporting the **Fortune 500**

Delivering & Managing **WFO** solutions globally in Cloud, Premise & Hybrid Models

Specialized team, with **80+** certified professionals committed to skills expansion

Net Promoter Score (NPS) of **85** across all engagements

Over **250** WFO Integrations, **300** Migrations, and more than **50** Upgrades to **V15.2**

Group Elite Communications is an award winning certified **Global Strategic Verint Business** partner specializing in Customer Engagement Solutions to optimize each part of the Customer Journey. In partnership with the leading WFO vendor Verint, Group Elite uses a broad base of skills and market expertise to consult, recommend, and deliver on the business and technical goals of our partners and customers.

"It has been an absolute pleasure working with the consulting team at Group Elite. They really care about our project and go above and beyond. This has built a strong partnership and we are excited about future projects."

Contact Center Director
American Healthcare Provider

Let our team help you:

Implement Automation Concepts in Your Center
Design Call Center Performance Management
Personalize Training & Consulting
Develop Custom RFP Questions and Needs Assessments

Click HERE to schedule a call with a contact center expert.
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