

## CaaS Customer Functional Roles

The tables below describe the different functions needed to make a successful contact center and should help you get a better understanding of each Interactive Intelligence course, training, or educational resource. Sections are divided by functional role and accompanied with our recommended training.

### Highly Recommended Training

#### Suggested Courses

All Users	
Functions	Training
<ul style="list-style-type: none"> <li>All users, including business users, agents and those listed below</li> </ul>	<ul style="list-style-type: none"> <li>Net Client WBT, Web Client WBT, Interaction Desktop WBT, Interaction Connect WBT (dependent on your organization)</li> <li>CIC Queue Types</li> <li>How ACD Selects an Agent</li> <li>How CIC Routes Interactions Based on Agent Skill</li> <li>Introduction to CIC</li> <li>Understanding the CIC Inheritance Model</li> <li>Understanding Users and Stations</li> <li>Just-in-time (JITS) videos</li> </ul>
Trainer	
Functions	Training
<ul style="list-style-type: none"> <li>Trains business users and agents on relevant applications</li> </ul>	<ul style="list-style-type: none"> <li>All relevant Client training</li> <li>Monitoring Contact Center Performance</li> <li>IC Reporting</li> <li>Quality Management in the Contact Center</li> <li>Just-in-time (JITS) videos</li> </ul>

<b>Trainer</b>	
<b>Functions</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>Manages contact center agents, determines strategies for meeting departmental goals, handles performance reporting, and sets individual goals for agents</li> </ul>	<ul style="list-style-type: none"> <li>Monitoring Contact Center Performance</li> <li>IC Reporting</li> <li>Just-in-time (JITS) videos</li> </ul>

<b>Quality Manager</b>	
<b>Functions</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>Creates and administers IR categories, recording rules and developing questionnaires for scoring recordings</li> </ul>	<ul style="list-style-type: none"> <li>Quality Management in the Contact Center</li> <li>Just-in-time (JITS) videos</li> </ul>

<b>Quality Evaluator</b>	
<b>Functions</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>Evaluates interaction recordings and provides agents with feedback to improve their performance</li> <li>Tracks quality performance, reports on expectations and performance to agents and/or supervisors</li> </ul>	<ul style="list-style-type: none"> <li>Quality Management in the Contact Center</li> <li>Monitoring Contact Center Performance</li> <li>IC Reporting</li> <li>Just-in-time (JITS) videos</li> </ul>

<b>Workforce Manager</b>	
<b>Functions</b>	<b>Training</b>
<ul style="list-style-type: none"> <li>Forecasts workload, creates schedules, manages real-time operational performance and schedule adherence, and reacts to the real-time needs of the operation</li> </ul>	<ul style="list-style-type: none"> <li>Interaction Optimizer Certified Administrator (IOCA)</li> <li>IC Reporting</li> <li>Just-in-time (JITS) videos</li> </ul>

Business Analyst	
Functions	Training
<ul style="list-style-type: none"> <li>Configures and distributes reports to stakeholders for contact center, team, and individual performance monitoring and evaluation</li> </ul>	<ul style="list-style-type: none"> <li>IC Reporting</li> <li>Just-in-time (JITS) videos</li> </ul>

IC Administrator	
Functions	Training
<ul style="list-style-type: none"> <li>Oversees the high-level administration of the IC system, was part of the implementation team, understands any integrations with pre-existing/in-house systems</li> </ul>	<ul style="list-style-type: none"> <li>CaaS CORE Associate Curriculum</li> <li>Interaction Center Core Specialist (ICCS) CORE Bootcamp or Curriculum</li> <li>Just-in-time (JITS) videos</li> </ul>

Daily CIC Administrator	
Functions	Training
<ul style="list-style-type: none"> <li>Performs moves, adds, and changes, troubleshoots Client usage difficulties, frequently on the Help Desk or Support team</li> <li>Executes these responsibilities following the processes that the IC Administrator has put in place</li> </ul>	<ul style="list-style-type: none"> <li>CaaS CORE Associate Curriculum</li> <li>Just-in-time (JITS) videos</li> </ul>

Outbound Campaign Administrator	
Functions	Training
<ul style="list-style-type: none"> <li>Manages the day-to-day usage of Dialer including, but not limited to: schedules, maintaining contact lists and DNC lists and investigating legal requirements</li> </ul>	<ul style="list-style-type: none"> <li>Interaction Dialer Certified Engineer (IDCE) Training</li> <li>CaaS CORE Associate Curriculum</li> <li>Just-in-time (JITS) videos</li> </ul>

