



Advanced Campaign Management for Interaction Dialer

Overview Guide

2018 R4

Last updated June 6, 2018
(See Change Log for summary of changes.)

Abstract

This overview guide explains how to use Interaction Dialer's Advanced Campaign Management features to configure a campaign to automatically modify its behavior as conditions change.

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Advanced Campaign Management for Interaction Dialer Overview Guide

What is Advanced Campaign Management?

Using the Advanced Campaign Management feature for Interaction Dialer, you can configure a campaign such that it automatically modifies its behavior throughout the day as conditions change. To do so, you break down your campaign into groups, each with the same set of campaign properties and adjust the values of the campaign properties in each group. You then arrange these campaign groups in a sequence so that the flow of the campaign transitions from group to group based on time, event, or statistical activation triggers.

The Advanced Campaign Management feature provides you with a set of tools that are integrated into Interaction Administrator's Dialer Manager and IC Business Manager's Interaction Supervisor. These tools allow you to construct Campaign Groups, organize the groups into a Campaign Sequence, and then monitor every detail as a Campaign Sequence runs.

Campaign Groups

Suppose that you are designing a campaign that will call a different set of numbers when the time of day changes to allow access to a different time zone. If so, you might create campaign groups for each time zone: Eastern, Central, Mountain, and Pacific; and assign the Zone Set property to all the campaign groups. Then, in each campaign group you would configure the Zone Set property with an appropriate value based on zone sets that you created previously. For instance, you may have created the following zone sets: Eastern Only, Central Only, Mountain Only, and Pacific Only.

Who is Advanced Campaign Management designed for?

- If you are a Dialer 3.0 customer who is currently using the Workflow feature, the Advanced Campaign Management feature will allow you to move up to Dialer 2018 and essentially take your Workflows with you. More specifically, this new feature has been designed to replicate the structure and functionality of Workflows using a new paradigm called Campaign Sequences.
- If you are a current Dialer customer who upgraded from Dialer 3.0, where you used the Workflow feature to manage your campaigns, you'll be able to use the Advanced Campaign Management feature to reorganize your campaigns to function more like Workflows.
- If you are a current Dialer customer who never used Dialer 3.0 or Workflows, then you'll want to take a close look at the Advanced Campaign Management feature to determine if you might be able to improve the efficiency of your campaigns by reorganizing them into Campaign Sequences.

Campaign Sequences

Once you have created your individually configured Campaign Groups, you add them to a Campaign Sequence in the order that you want them to run. As you do, you configure the condition, or activation, that you want to use to transition from one Campaign Group to the next.

Continuing with our example, you might configure an event activation for the first Campaign Group and a time activation for each of the other Campaign Groups. The event activation would be set to occur when the campaign is started and the activation for the other Campaign Groups will be set to a time appropriate to each time zone. Supposing that you are located in the Eastern time zone, the activation

for the Eastern campaign group could be set to Campaign Started, the activation for the Central Campaign Group could be set to 11:00 am, the activation for the Mountain Campaign Group could be set to 1:00 pm, and the activation for the Pacific Campaign Group could be set to 4:00 pm.

Monitoring Campaign Sequences

Once you have configured and saved a Campaign Sequence, the Advanced Campaign Management feature provides you with a set of tools you can use to keep an eye on the Campaign Sequence as it runs—transitioning from group to group. At any point in time, you can check in on a running Campaign Sequence and immediately identify what Campaign Group is currently active, what Campaign Group previously ran, and what Campaign Group is up next. You will also find progress gauges that will help you to determine when the next transition will occur.

A diagram view provides you with a global view of the entire Campaign Sequence. And, if unanticipated conditions pop up at any time, you have the ability to initiate a manual transition to any group in the sequence.

While a Campaign Sequence is running, each transition that occurs is reported in Dialer Health view as well as recorded in log files. There are also reports that help you track and compile information on the operation of your Campaign Sequences.

How do I get Advanced Campaign Management?

Advanced Campaign Management is packaged as a Dialer Feature License, so all you have to do is obtain the feature license and install it on your CIC server using the License Management tool in Interaction Administrator.

Once the Advanced Campaign Management feature license is installed, you'll find new tabs in Interaction Administrator's Dialer Manager and new views in IC Business Manager's Interaction Supervisor.

Can I control access to Advanced Campaign Management?

Access to Advanced Campaign Management is specified through a set of security rights that allow you to regulate the level of control a user can have over Campaign Groups and Campaign Sequences.

You can control whether a user can:

- Create or modify a Campaign Group
- Modify a Campaign Sequence
- Manually transition a Campaign Group in a Campaign Sequence

Without these security rights, a user can only view existing Campaign Groups and Campaign Sequences.

The Campaign Sequence Tab

When you install the Advanced Campaign Management Feature License, you'll have access to the Campaign Sequence tab in Interaction Administrator > Dialer Manager. From here you can create and configure Campaign Groups, establish a Campaign Sequence, specify activation triggers, and use the Campaign Diagram to visualize the Campaign Sequence as you create it.

Status: Paused

Manual [Play] [Pause] [Refresh] [Recycle Campaign] [Reset Campaign] [Run Test]

ⓘ Status change will not take effect until campaign is saved.

Basic Configuration Display Transition Alerts in Clients

Contact List **3** Campaign Groups **2**

Campaign Group	Actions
Eastern	> Properties
Central	> Properties
E/C	> Properties
Mountain	> Properties
Pacific	> Properties
M/P	> Properties
All Zones	> Properties

Automation **1**

Campaign Sequence

5 Campaign Sequence **4**

Campaign Group	Activation	Parent
Eastern	Contact List Recycled	[Startup Group]
Central	Contact List Recycled	Eastern
E/C	Contact List Recycled	Central
Mountain	Contact List Recycled	E/C
Pacific	Contact List Recycled	Mountain
M/P	Contact List Recycled	Pacific
All Zones	Contact List Recycled	M/P
Eastern	Contact List Recycled	All Zones

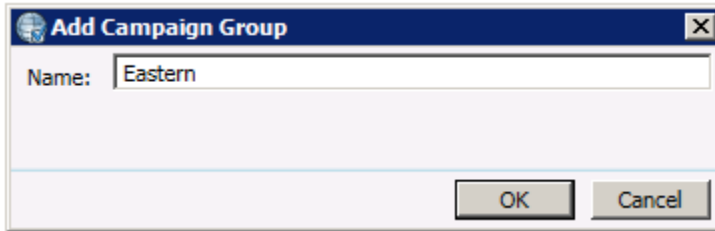
Auto-save Save Revert

1. The Campaign Sequence tab appears in the Campaigns view.
2. You use the commands on this toolbar to create and configure Campaign Groups.
3. As you create Campaign Groups, they appear in the Campaign Groups section.
4. You use the commands on this toolbar to create and configure a Campaign Sequence.
5. The Campaign Sequence section shows the Campaign Groups in the order in which you want them to run.

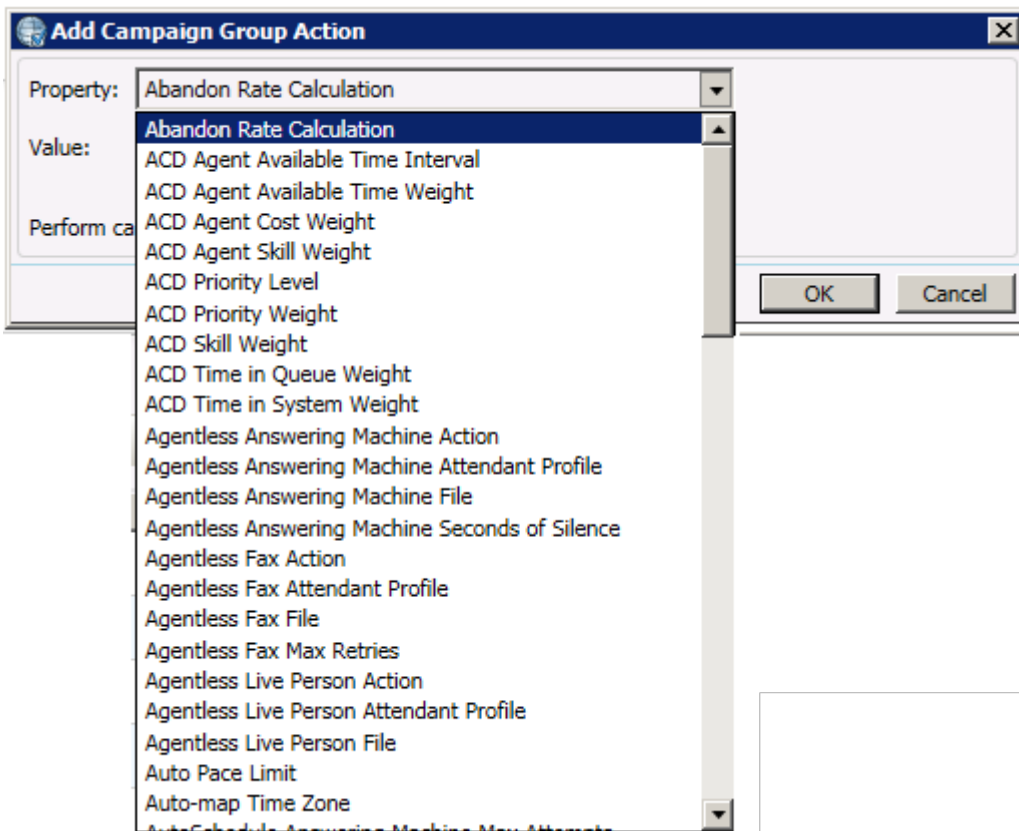
Create and Configure Campaign Groups

You use the controls in the Campaign Groups panel to create and configure the Campaign Groups that you want to add to your campaign Sequence.

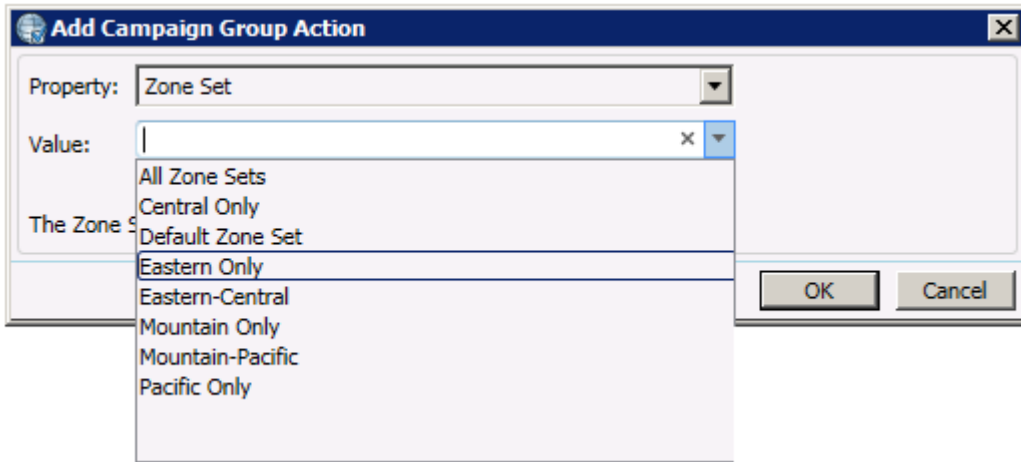
1. Create a Campaign Group



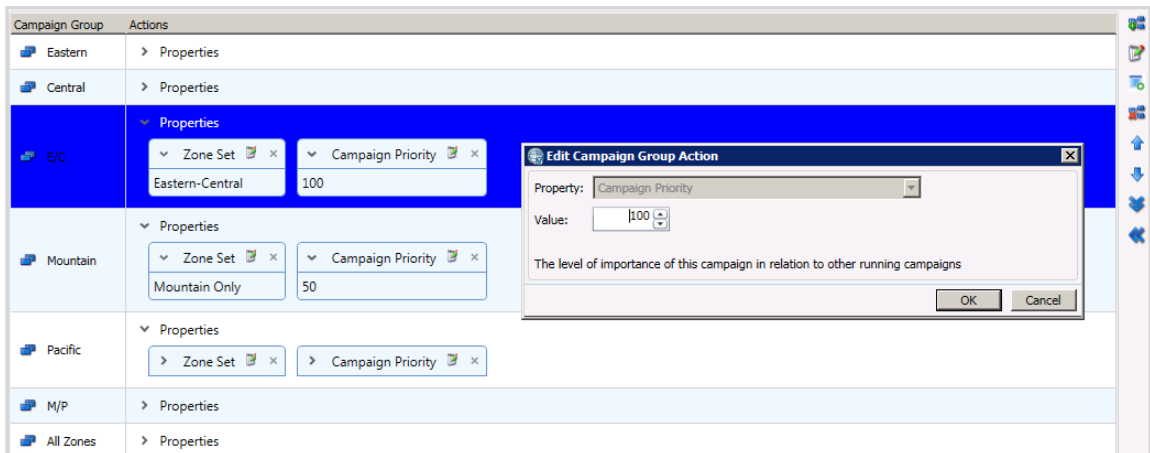
2. Add any standard campaign property to the Campaign Group. You can add multiple properties to a Campaign Group.



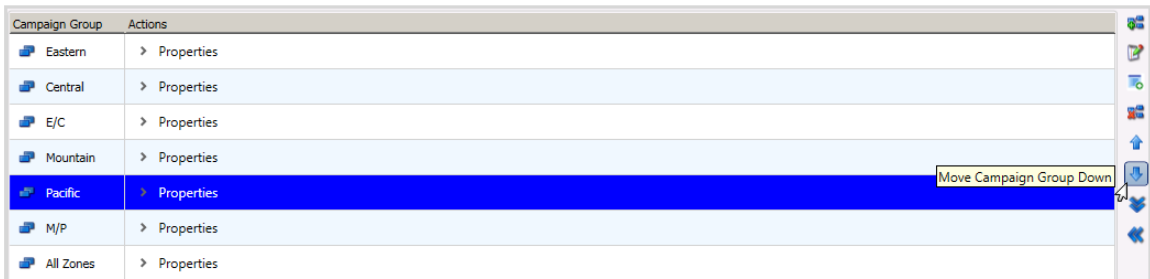
3. Set the value for the property.



4. You can view and modify the campaign properties in the Campaign Groups section. All Campaign Groups have the same set of properties but each individual property can have a different value.



5. Position Campaign Groups in the order you want them to run in the actual Campaign Sequence.



Create and Configure a Campaign Sequence

You can automatically generate a Campaign Sequence based on your Campaign Group arrangement and then configure activation triggers as well as create additional transition paths between the groups. As you do, you can use the Campaign Diagram to visualize how the Campaign Sequence will work as well as to track down any potential problems in the flow.

You use activation types to trigger the transition from one Campaign Group to the next. There are three activation types to choose from:

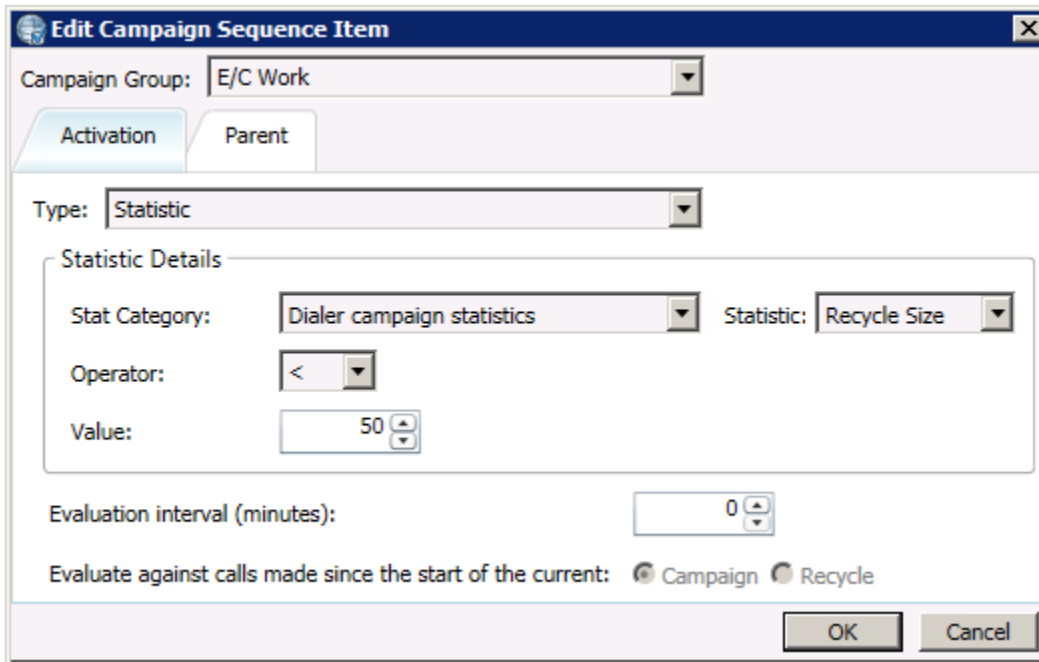
- A System Event activation type triggers a campaign transition when the selected events occur.

The screenshot shows the 'Edit Campaign Sequence Item' dialog box. The 'Campaign Group' is set to 'E/C'. The 'Activation' tab is selected, and the 'Type' is 'System Event'. A list of events is shown with checkboxes: 'Contact List Recycled' (checked), 'Campaign Started', 'Campaign Stopped', 'Campaign Restarted', 'Campaign Paused', and 'Campaign Unpaused'. 'OK' and 'Cancel' buttons are at the bottom.

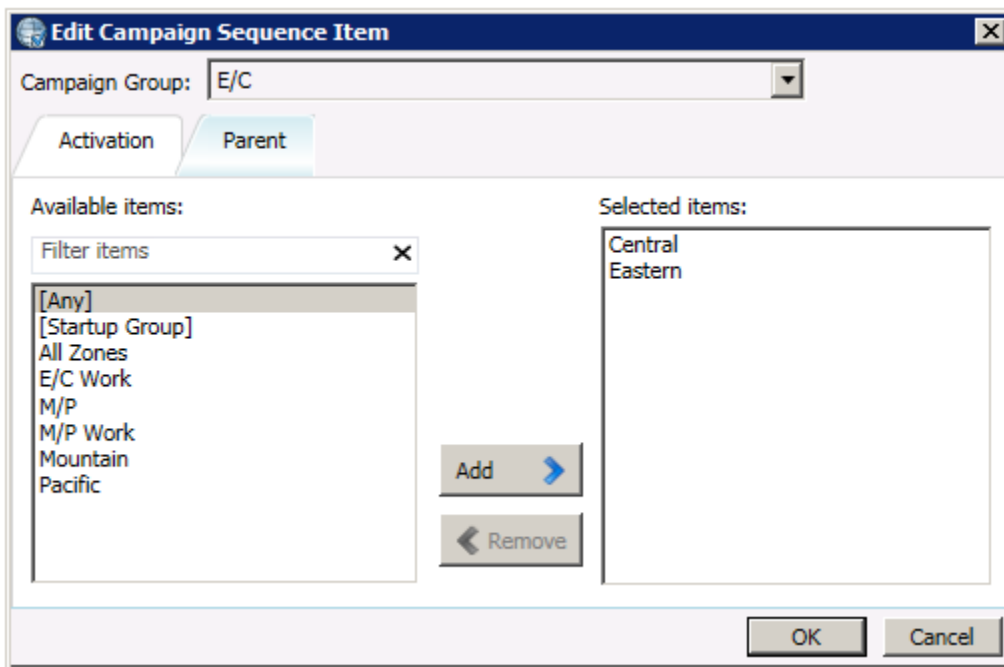
- A Time activation type triggers a campaign transition when the configured moment in time occurs.

The screenshot shows the 'Edit Campaign Sequence Item' dialog box. The 'Campaign Group' is set to 'Eastern'. The 'Activation' tab is selected, and the 'Type' is 'Time'. The 'Time' is set to '8:00:00 AM'. The 'Selected Days' radio button is selected, and the days 'Monday', 'Tuesday', 'Wednesday', 'Thursday', and 'Friday' are highlighted. Other options include 'Every Day', 'Exact Date' (set to '1/1/0001'), and 'Timer (minutes)' (set to '1'). 'OK' and 'Cancel' buttons are at the bottom.

- A statistic activation type triggers a campaign transition when the configured statistic occurs.



- Each Campaign Group in the sequence must have a parent group to maintain its transition path. As you get more elaborate with your campaign sequence design, you may find that some groups in the sequence need to have multiple parents.

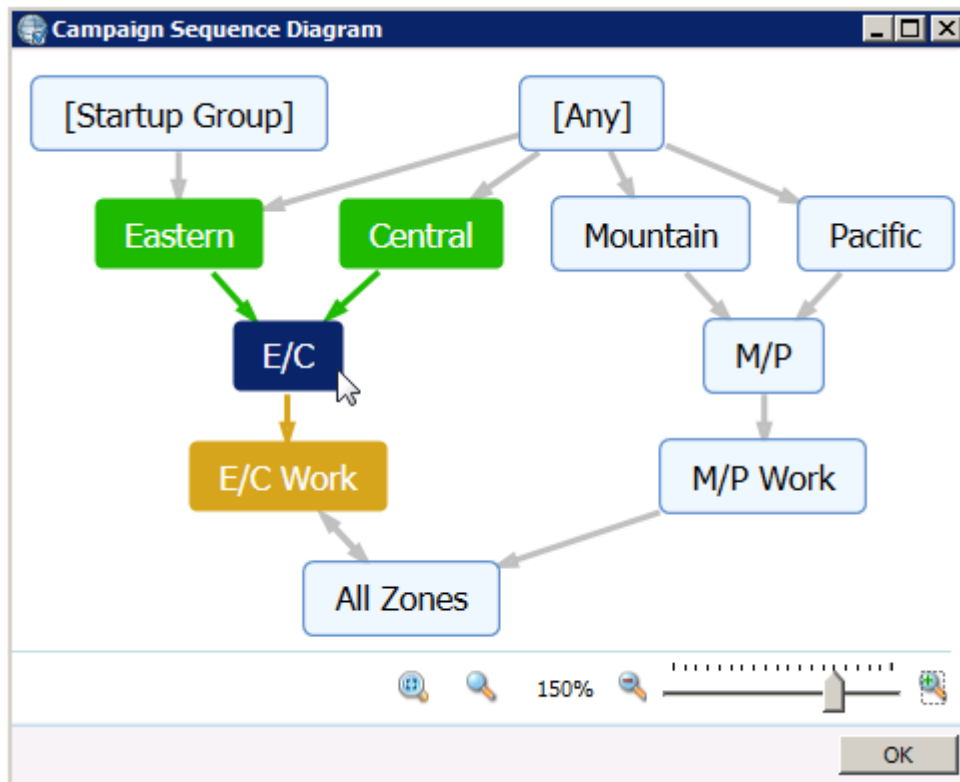


Complex Campaign Sequence Example

This example shows how a complex Campaign Sequence might be configured. All three activation types are used to drive the various campaign transitions and several of the Campaign Groups have two parents. You'll also notice the use of the [Any] parent, which indicates that a campaign transition can come from any one of several parent groups depending on which activation trigger occurs first.

Campaign Group	Activation	Parent
Eastern	Contact List Recycled, Campaign Started, Campaign Restarted	[Startup Group]
Central	Monday, Tuesday, Wednesday, Thursday, Friday at 11:00 AM	[Any]
Eastern	Monday, Tuesday, Wednesday, Thursday, Friday at 9:00 AM	[Any]
Mountain	Monday, Tuesday, Wednesday, Thursday, Friday at 1:00 PM	[Any]
Pacific	Monday, Tuesday, Wednesday, Thursday, Friday at 4:00 PM	[Any]
E/C	Contact List Recycled	Central, Eastern
M/P	Contact List Recycled	Mountain, Pacific
E/C Work	Recycle Size < 50	All Zones, E/C
M/P Work	Recycle Size < 150	M/P
All Zones	Contact List Recycled	E/C Work, M/P Work

As you build a complex Campaign Sequence, the Campaign Diagram can help you visualize how it will work.



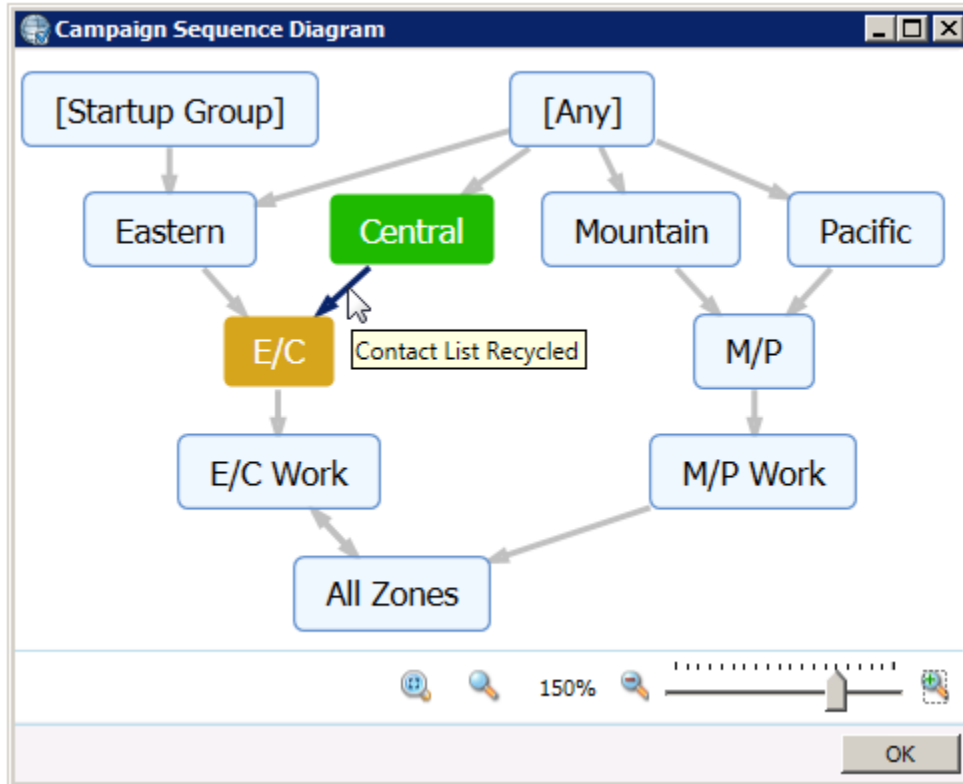
When you hover over any Campaign Group node in the diagram, color coding shows you at a glance where each item would be in the sequence.

- Blue shows what would be the current campaign sequence item.

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- Green shows what would be the previous campaign sequence items.
- Yellow shows what would be the pending campaign sequence items.

When you hover over any arrow that connects Campaign Groups, a tooltip shows you the activation type that will trigger that campaign transition.



Dialer Campaign Sequence Details View

When you install the Advanced Campaign Management Feature License you'll have access to the Dialer Campaign Sequence Details view in IC Business Manager. From here, you can closely monitor all facets of the Campaign Sequence in real time. When a campaign transitions occurs, the screen will momentarily blank out and then display the updated state of the Campaign Sequence.

1 Statistics at the top of the view are updated in real-time to indicate the performance of the currently running Campaign Group.

2 The Pending Campaign Sequence Items section shows you all Campaign Groups that have the potential to run next.

3 The Campaign Groups section contains the Sequence Configuration and Sequence Diagram tabs that provide you with mechanisms for monitoring the progression of the running Campaign Sequence in real-time.

Campaign Group Name	Activation Type	Next Activation	Activation Progress
Central	Time	11/13/2015 11:00:00 AM	0% 20% 40% 60% 80% 100%
E/C Work	Statistic	Recycle Size < 50	0% 20% 40% 60% 80% 100%
Mountain	Time	11/12/2015 1:00:00 PM	0% 20% 40% 60% 80% 100%
Pacific	Time	11/12/2015 4:00:00 PM	0% 20% 40% 60% 80% 100%
Eastern	Time	11/13/2015 9:00:00 AM	0% 20% 40% 60% 80% 100%

Campaign Group Name	Calling Mode	Contact Columns	Display Transition Alerts	Initial Calls Per Agent	Sort	Zone Set
Eastern	Predictive	HPHONE, PRIPHONE	True	80	ATTEMPTS (descending)	Eastern Only
E/C	Predictive	HPHONE, PRIPHONE, PRIMOBILE	True	80	ATTEMPTS (descending)	Eastern-Central
Central	Power	HPHONE, COMOBILE, PRIPHONE	True	80	ATTEMPTS (descending)	Central Only
E/C Work	Power	HPHONE, PRIMOBILE, PRIDPHONE	True	80	ATTEMPTS	Eastern-Central
Mountain	Predictive	PRIPHONE, PRIDPHONE	True	80	ATTEMPTS (descending)	Mountain Only
Pacific	Preview	COHPHONE	True	80	ATTEMPTS (descending)	Pacific Only
All Zones	Predictive	COHPHONE	True	80	ATTEMPTS (descending)	All Zone Sets
M/P	Preview	OHPHONE, COBPHONE, COMOBILE	True	80	ATTEMPTS (descending)	Mountain-Pacific
M/P Work	Predictive	COHPHONE, PRIMOBILE	True	80	ATTEMPTS (descending)	Mountain-Pacific

1. Statistics at the top of the view are updated in real-time to indicate the performance of the currently running Campaign Group.
2. The Pending Campaign Sequence Items section shows you all Campaign Groups that have the potential to run next.
3. The Campaign Groups section contains the Sequence Configuration and Sequence Diagram tabs that provide you with mechanisms for monitoring the progression of the running Campaign Sequence in real-time.

Tracking Pending Campaign Sequence Items

1. Campaign Groups that have the potential to be the next active group in the sequence are listed in the order specified in the Campaign Sequence.

1	2	3	4
Campaign Group Name	Activation Type	Next Activation	Activation Progress
Central	Time	11/13/2015 11:00:00 AM	0% 20% 40% 60% 80% 100%
E/C Work	Statistic	Recycle Size < 50	0% 20% 40% 60% 80% 100%
Mountain	Time	11/12/2015 1:00:00 PM	0% 20% 40% 60% 80% 100%
Pacific	Time	11/12/2015 4:00:00 PM	0% 20% 40% 60% 80% 100%
Eastern	Time	11/13/2015 9:00:00 AM	0% 20% 40% 60% 80% 100%

2. Each Campaign Group's assigned Activation Type is shown for easy reference.
3. The configured activation is shown in detail to help you identify what could potentially trigger the next activation.
4. Various progress gauges provide you with an approximation of when the associated activation will trigger a transition to that Campaign Group.
 - Statistic and Event progress gauges use a floating arrow head, which can move both forward and backward depending on circumstances within the currently running campaign sequence.
 - Time Activation progress gauges use a bar that always moves forward as the current time approaches the time specified as the moment of activation.
5. At any point in time you can perform a manual transition. Just right-click on the Campaign Group you want to make the active one and select Transition Campaign.

Campaign Group Name	Activation Type	Next Activation	Activation Progress
Central	Time	11/13/2015 11:00:00 AM	0% 20% 40% 60% 80% 100%
E/C Work	Statistic	Recycle Size < 50	0% 20% 40% 60% 80% 100%
Mountain	Time	11/12/2015 1:00:00 PM	0% 20% 40% 60% 80% 100%
Pacific	Time	11/12/2015 4:00:00 PM	0% 20% 40% 60% 80% 100%
Eastern	Time	11/13/2015 9:00:00 AM	0% 20% 40% 60% 80% 100%

NOTE: We use the term *approximation* when discussing progress gauges because a variety of circumstances within the campaign can influence the actual progress. For example, while it appears that Mountain will be the next active Campaign

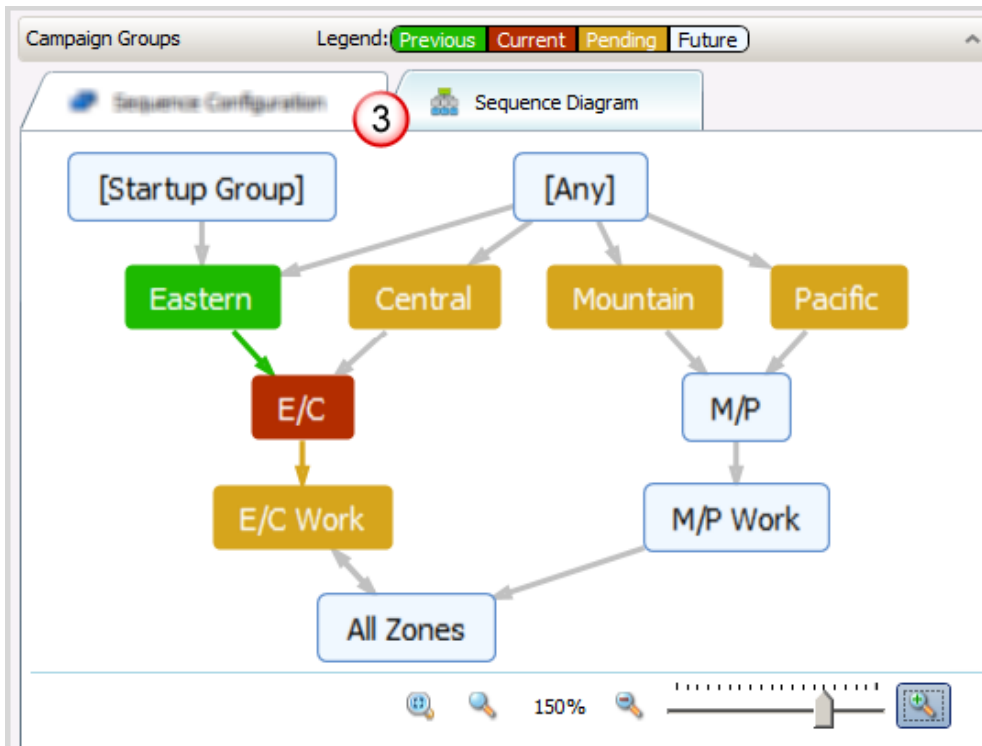
Group, the Recycle Size could drop below 50 before 1:00 PM causing E/C Work to become the next active Campaign Group.

Monitor Campaign Transitions

1. The Campaign Groups section header provides a legend for the color coding used to identify the current state of the Campaign Groups shown on the Sequence Configuration and Sequence Diagram tabs.

Campaign Group Name	Calling Mode	Contact Columns	Display Transition Alerts	Initial Calls Per Agent	Sort	Zone Set
Eastern	Predictive	PRIHPHONE	True	80	ATTEMPTS (descending)	Eastern Only
E/C	Predictive	HPHONE, PRIHPHONE, PRIMOBILE	True	80	ATTEMPTS (descending)	Eastern-Central
Central	Power	DHPHONE, COMOBILE, PRIHPHONE	True	80	ATTEMPTS (descending)	Central Only
E/C Work	Power	HPHONE, PRIMOBILE, PRIOPHONE	True	80	ATTEMPTS	Eastern-Central
Mountain	Predictive	PRIHPHONE, PRIOPHONE	True	80	ATTEMPTS (descending)	Mountain Only
Pacific	Preview	COHPHONE	True	80	ATTEMPTS (descending)	Pacific Only
All Zones	Predictive	COHPHONE	True	80	ATTEMPTS (descending)	All Zone Sets
M/P	Preview	DHPHONE, COBPHONE, COMOBILE	True	80	ATTEMPTS (descending)	Mountain-Pacific
M/P Work	Predictive	COHPHONE, PRIMOBILE	True	80	ATTEMPTS (descending)	Mountain-Pacific

2. The Sequence Configuration tab provides a real-time display of the Campaign Sequence as it is running. It also provides a complete list of all campaign properties and the associated values.
3. The Sequence Diagram tab also provides a real-time display of the Campaign Sequence as it is running. And, just like the diagram in Dialer Manager, you can hover over any Campaign Group node in the diagram and the color coding changes to show you how the Campaign Sequence will play out when different Campaign Groups are active in the sequence.



- Each Campaign Group transition is recorded in Dialer Health view in the Dialer History Messages section and includes detailed information about what caused the transition and when it occurred.

The screenshot shows the 'Dialer Health View' interface. It contains two main sections: 'Dialer Status Messages' and 'Dialer History Messages'. The 'Dialer History Messages' section has a dropdown menu set to 'Demo' and buttons for 'Refresh' and 'Clear History'. A 'Message Details' dialog box is open over the history messages, showing details for a message with a red circle containing the number 4 next to its time. The details include Campaign (Demo), Process Name (CampaignServer2J.exe), Severity (Information), Site, and a detailed message: 'Campaign group transitioned from 'E/C Work' to 'All Zones'. Reason: Sequence Item: <All Zones> Parent: <E/C Work> Condition: <Call List Recycled> event triggered'. The time is 11/13/2015 2:36:04 AM. There are 'Copy' and 'Close' buttons at the bottom of the dialog.

- When creating the Best Time to Call report or the Call Answer Distribution report, you'll find a filter that allows you to isolate data pertaining to Campaign Groups.

The screenshot displays two reports from Interactive Intelligence. The top report is 'Call Answer Distribution' with filters: Date (9/1/2015 12:00:00 PM to 10/15/2015 6:24:03 PM), Site (Regular_server), Campaign (Demo Sequential), and Campaign Group (All Zones). The bottom report is 'Best Time To Call Analysis' with filters: Date (7/1/2015 12:00:05 AM - 10/1/2015 11:59:59 PM), Site (<All>), Campaign (rabahcampaign), and Campaign Group (<All>). Below the filters is a table with the following data:

Time	Dials	Contracts		Right Party Contact			Success			
		#	Per Dial	#	Per Dial	Per Contact	#	Per Dial	Per Contact	Per RPC
7:00	9,594	1,903	19.85	1,899	19.81	99.79	930	9.70	48.87	48.87
8:00	170,960	33,830	19.78	30,373	17.76	89.78	15,125	8.85	44.71	49.80
9:00	359,960	73,727	20.48	76,130	21.43	95.67	18,195	5.05	49.69	70.36

Change Log

Date	Description
Dec. 12, 2017	Added this Change Log.
March 14, 2018	Updated cover page to indicate 2018 R3 release.
March 14, 2018	Updated cover page to indicate 2018 R4 release.