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GENESYS™

Interaction Dialer

Advanced Campaign Management Overview Guide

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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Table of Contents

Table of Contents 2
Introduction to Interaction Dialer Advanced Campaign Management 3
- Campaign groups 3
- Campaign sequences 3
- Monitoring campaign sequences 3

How do I get Advanced Campaign Management? 4
Can I control access to Advanced Campaign Management? 5
Campaign Sequence Tab 6
Create and Configure Campaign Groups 7
- Create and Configure a Campaign Sequence 8
- Complex Campaign Sequence Example 10

Dialer Campaign Sequence Details View 13
- Tracking Pending Campaign Sequence Items 14
- Monitor Campaign Transitions 14

Change Log 17

Introduction to Interaction Dialer Advanced Campaign Management

Interaction Dialer release 4.0 moved from a workflow-based approach to the use of rules and policies. However, in some cases this new approach made it hard to develop the kind of functionality available to workflow-based campaigns.

Advanced Campaign Management—a feature of Dialer 2018—allows you to develop campaigns that look a lot like workflow-based campaigns. It also simplifies these and other types of campaigns, in comparison to what was possible in Dialer 4.0.

Note that although Advanced Campaign Management is based on a *single-campaign* model, it functions a lot like workflows in other respects—and in many cases it gives you a similar level of control. For example, a workflow that uses multiple campaigns might have Campaign 1 dial home phones until 9:00 a.m., then switch to Campaign 2, which would dial work phones from 9:00 until 11:00, and so on. Advanced Campaign Management uses a single campaign that works with the rules and policy engine to accomplish the same goal.

Campaign groups

This is possible because Advanced Campaign Management lets you break your campaign down into *campaign groups*. You can customize each group with time-based, event-based, or statistics-based activation triggers. By arranging the groups in a sequence, you can have the campaign transition from group to group based on these triggers, allowing your campaign to automatically modify its behavior throughout the day.

Advanced Campaign Management uses tools that are integrated into Interaction Administrator's Dialer Manager section and the Interaction Supervisor section in IC Business Manager. Use these tools to create campaign groups, organize them into a *campaign sequence*, and then monitor every detail as the sequence runs.

Suppose you're designing a campaign that switches to a different set of numbers when the time of day changes, to allow access to different time zones. To accomplish this, you could create campaign groups for the Eastern, Central, Mountain and Pacific time zones, assigning the Zone Set property to each of the campaign groups. Then you would configure the Zone Set property in each campaign group with an appropriate value, based on the zone sets you created previously. For this example, you might create the following zone sets: Eastern Only, Central Only, Mountain Only, and Pacific Only.

Campaign sequences

Once you have created individually configured campaign groups, you can add them to a campaign sequence in the order that you want them to run. As you do this, configure the condition—or *activation*—that you want to use to transition from one campaign group to the next.

Continuing with our example, you could 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 would 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, you can use the tools provided with Advanced Campaign Management to keep an eye on the campaign sequence as it transitions from group to group. You can check in on a running campaign sequence whenever you feel like it, immediately identifying which campaign group is currently active, which campaign group previously ran, and which campaign group is up next. There are also progress gauges to help you determine when the next transition will occur.

There's also a diagram view that gives you a global view of the entire campaign sequence. And if you run into any problems, you can initiate a manual transition to any group in the sequence.

While your campaign sequence is running, each transition is reported in Dialer Heath view and recorded in your log files. Advanced Campaign Management also comes with reports you can use to track 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.

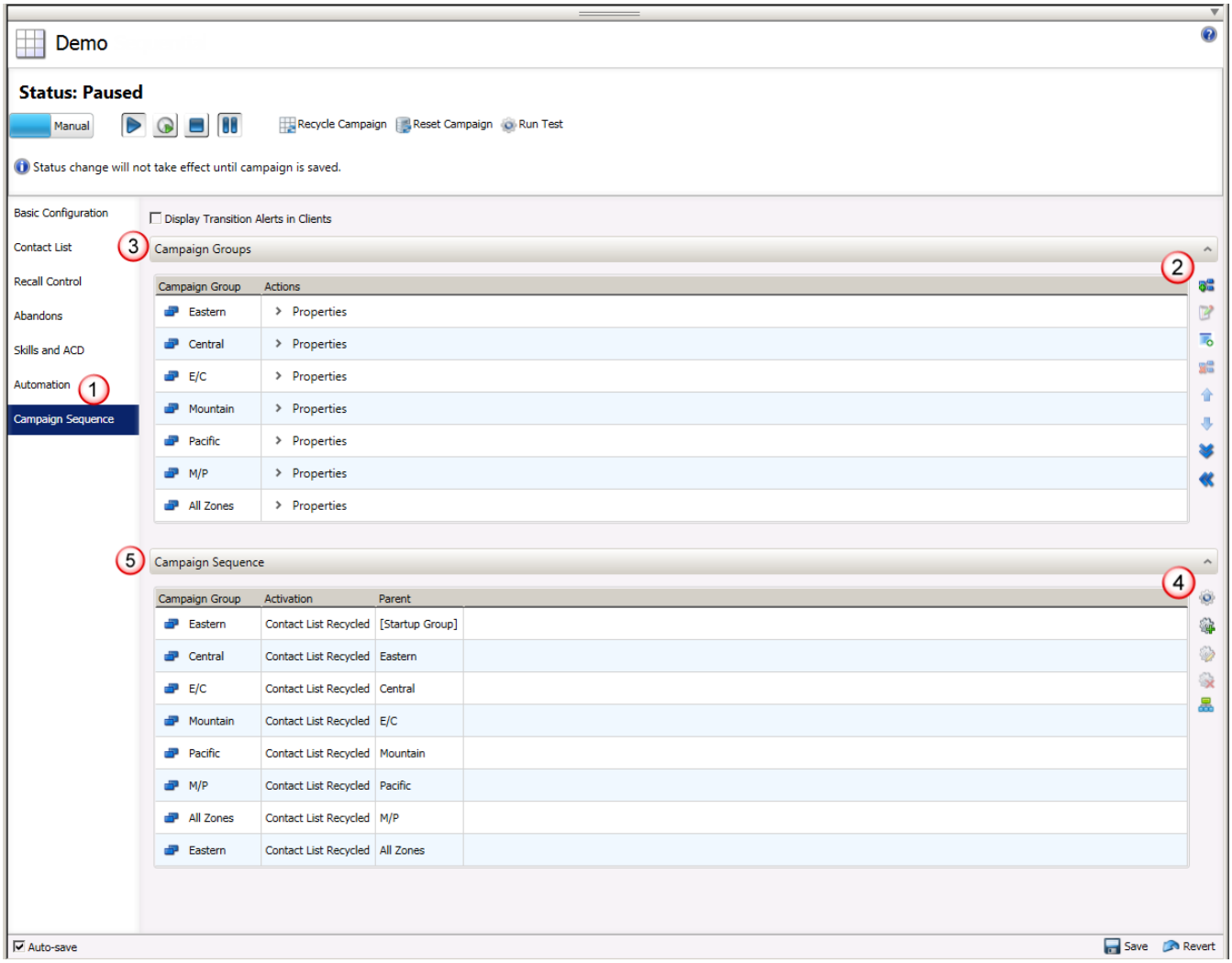
You can control whether a user can:

- 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.

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.

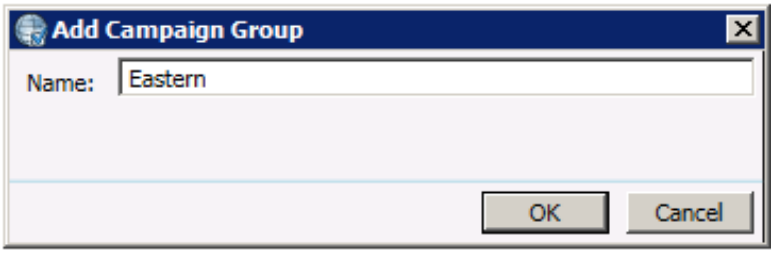


1. The Campaign Sequence tab appears in the Campaigns view.
2. You use the commands on this toolbar to create and configure Campaign Groups.
3. As you create Campaign Groups, they appear in the Campaign Groups section.
4. You use the commands on this toolbar to create and configure a Campaign Sequence.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

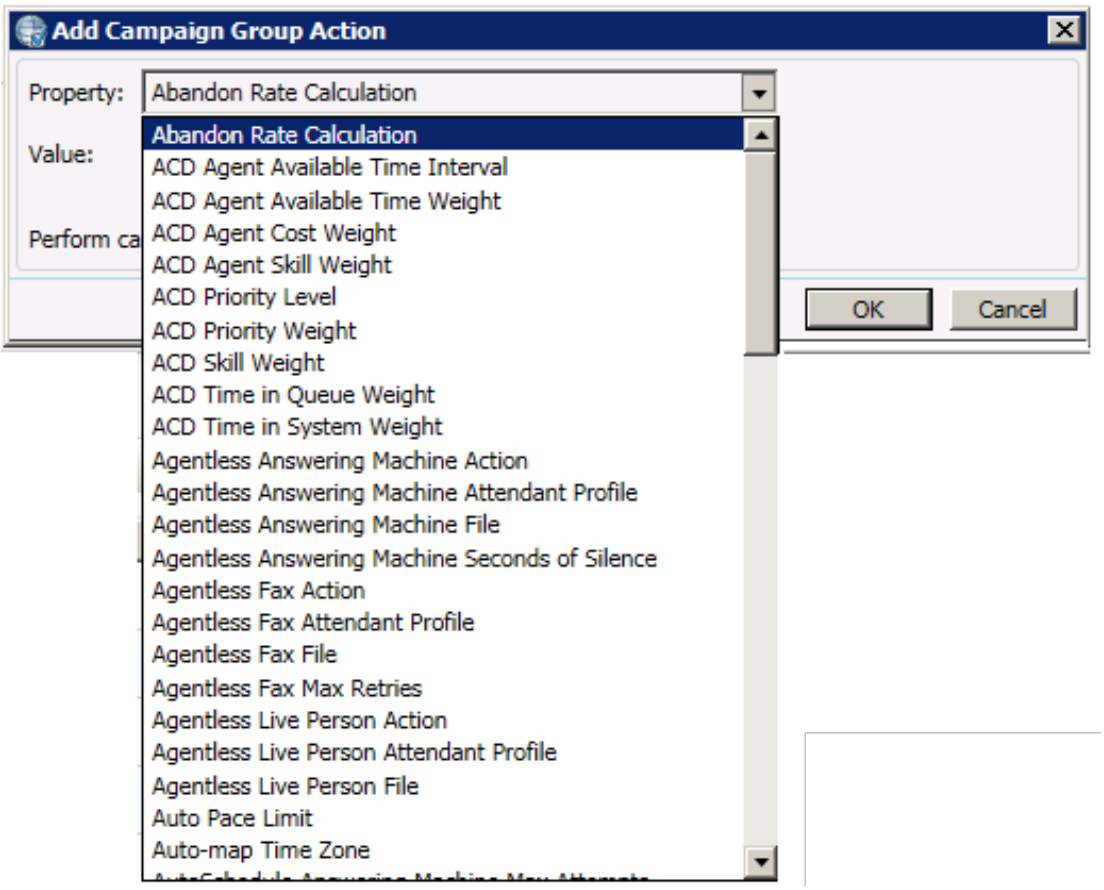
Create and Configure Campaign Groups

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.

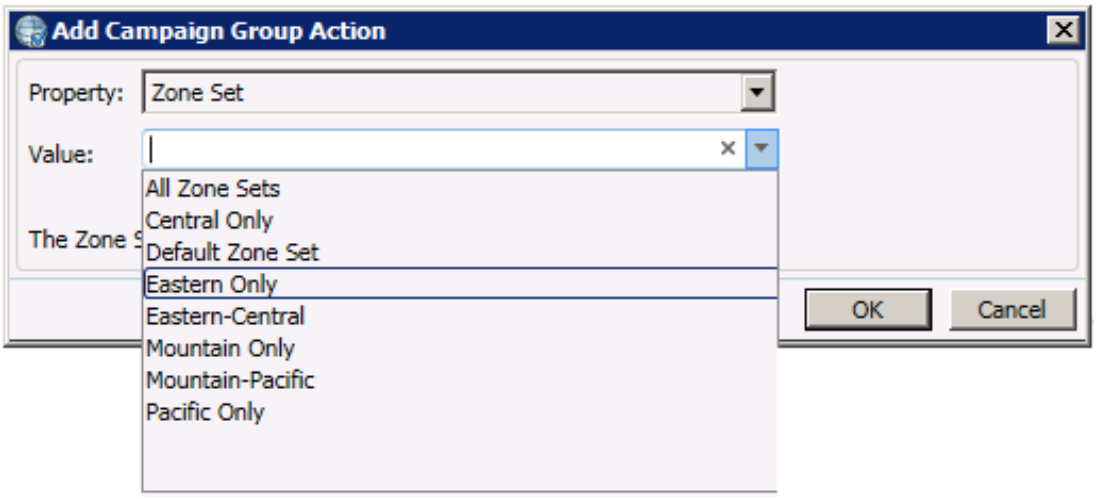
1. Create a Campaign Group



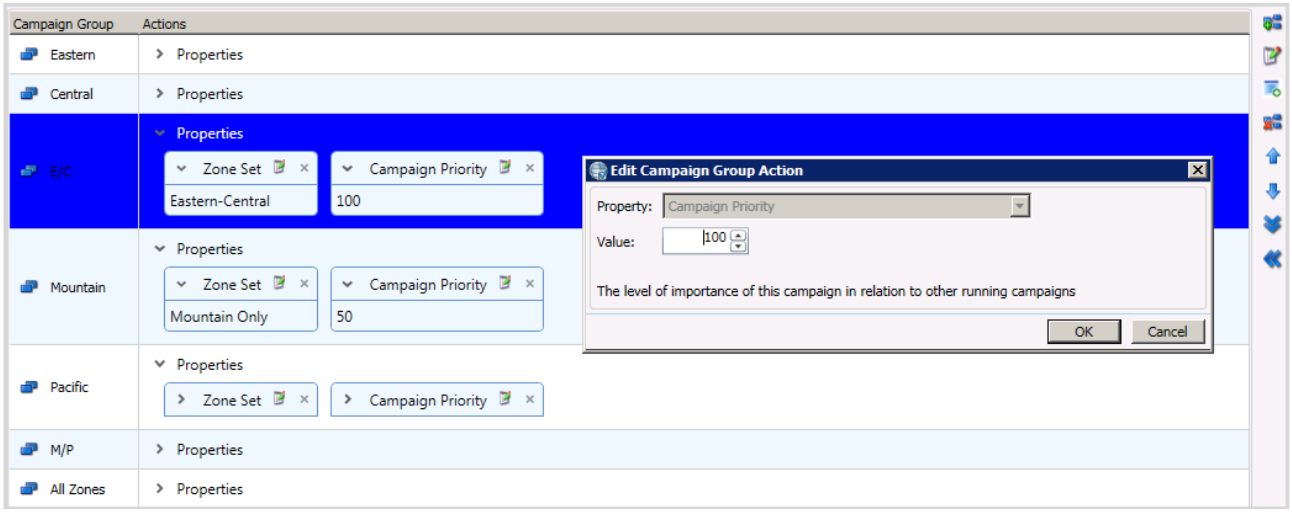
2. Add any standard campaign property to the Campaign Group. You can add multiple properties to a Campaign Group.



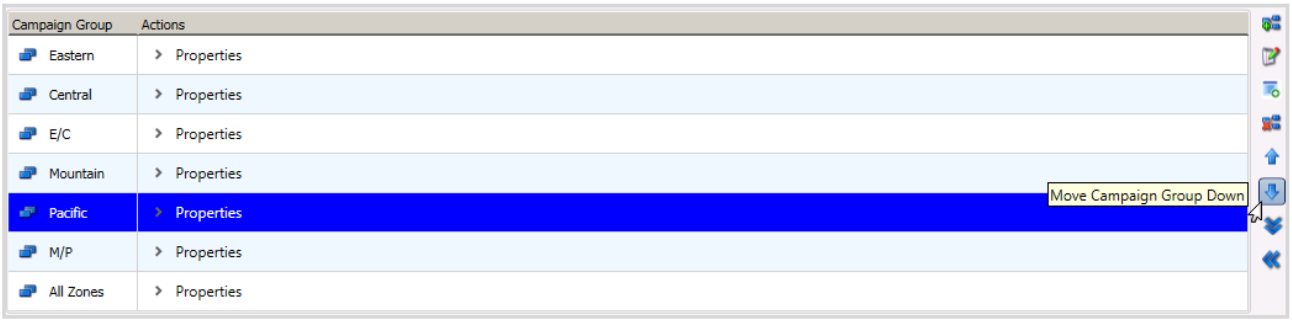
3. Set the value for the property.



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.

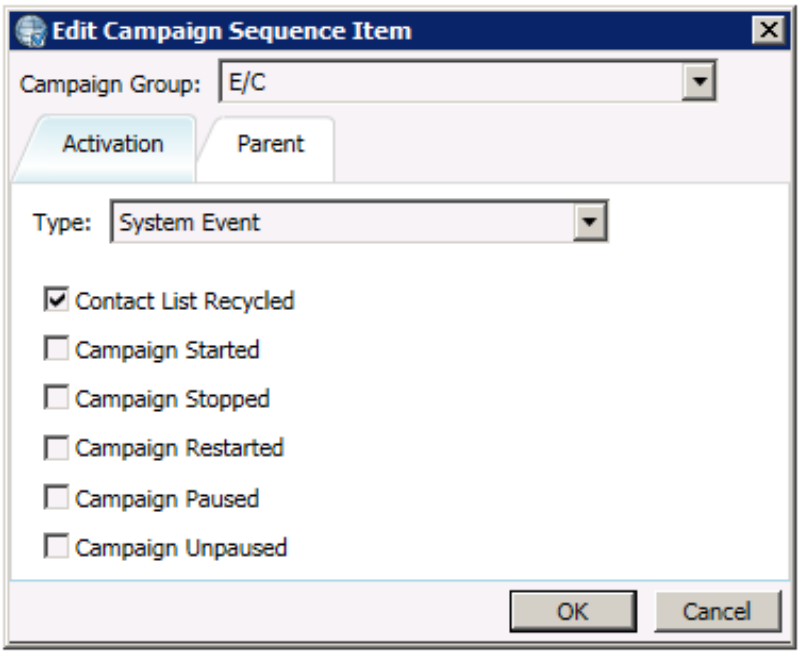


Create and Configure a Campaign Sequence

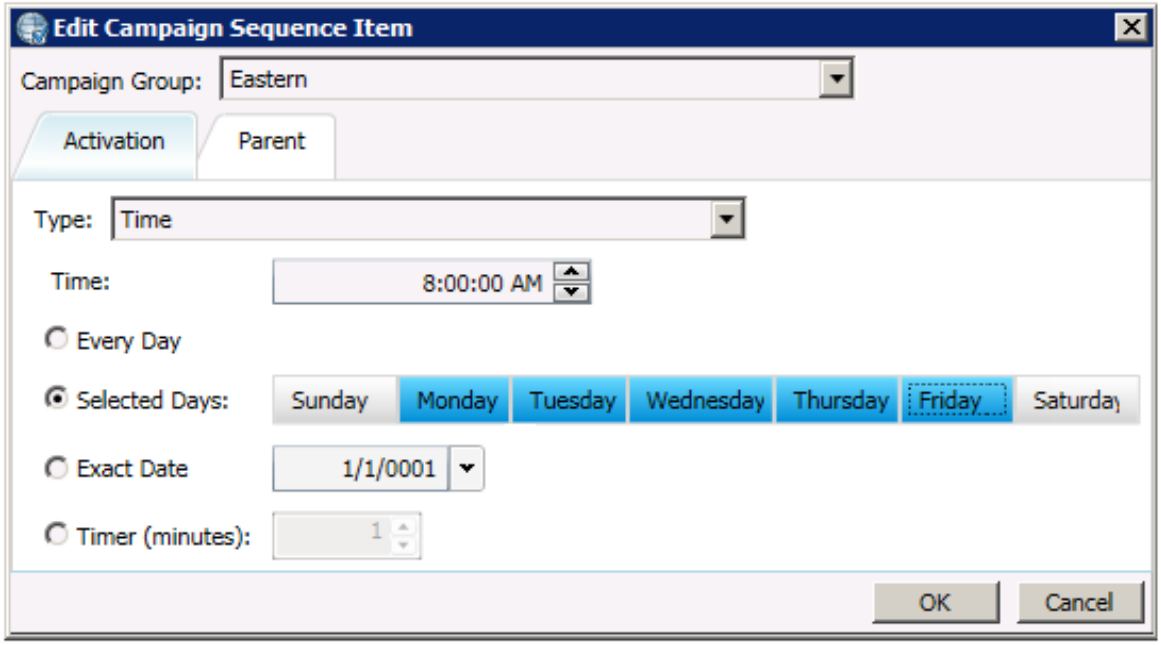
You can automatically generate a Campaign Sequence based on your Campaign Group arrangement and then configure activation triggers as well as create additional transition paths between the groups. As you do, you can use the Campaign Diagram to visualize how the Campaign Sequence will work as well as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

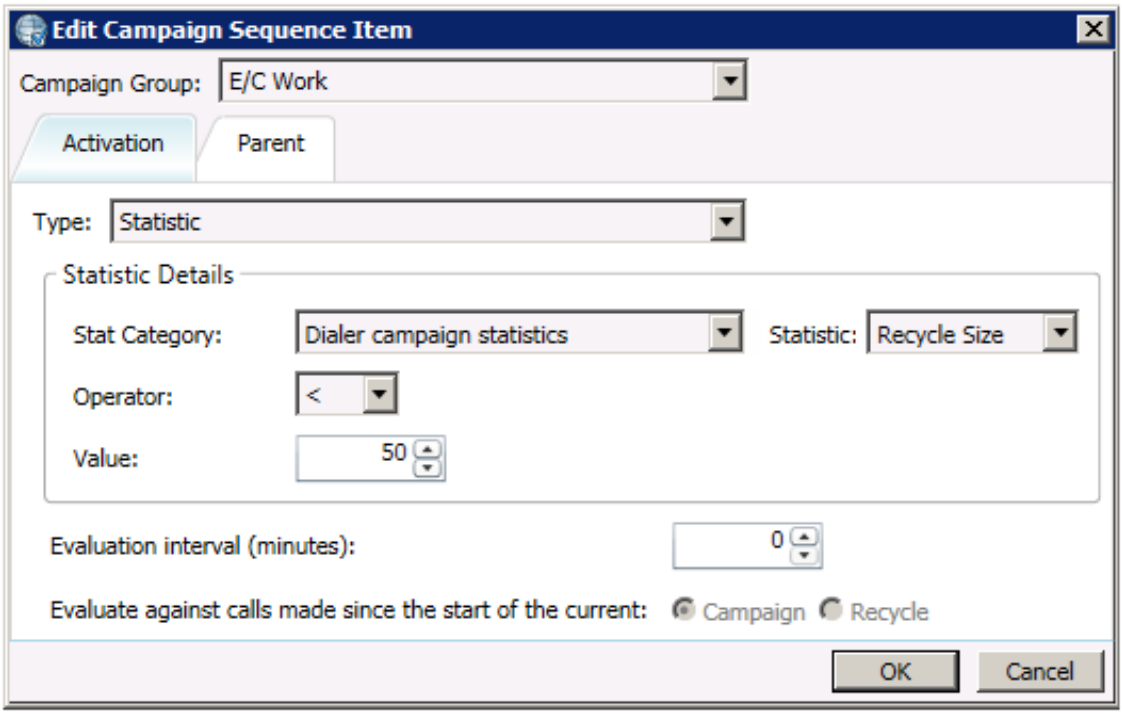
- A System Event activation type triggers a campaign transition when the selected events occur.



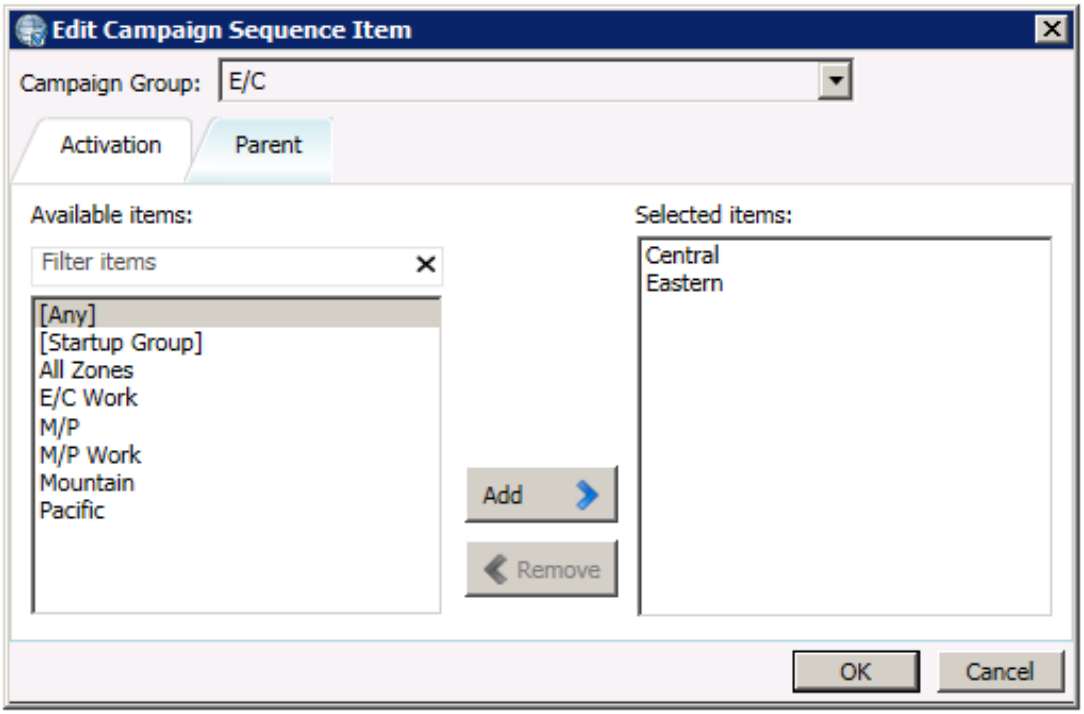
- A Time activation type triggers a campaign transition when the configured moment in time occurs.



- 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.

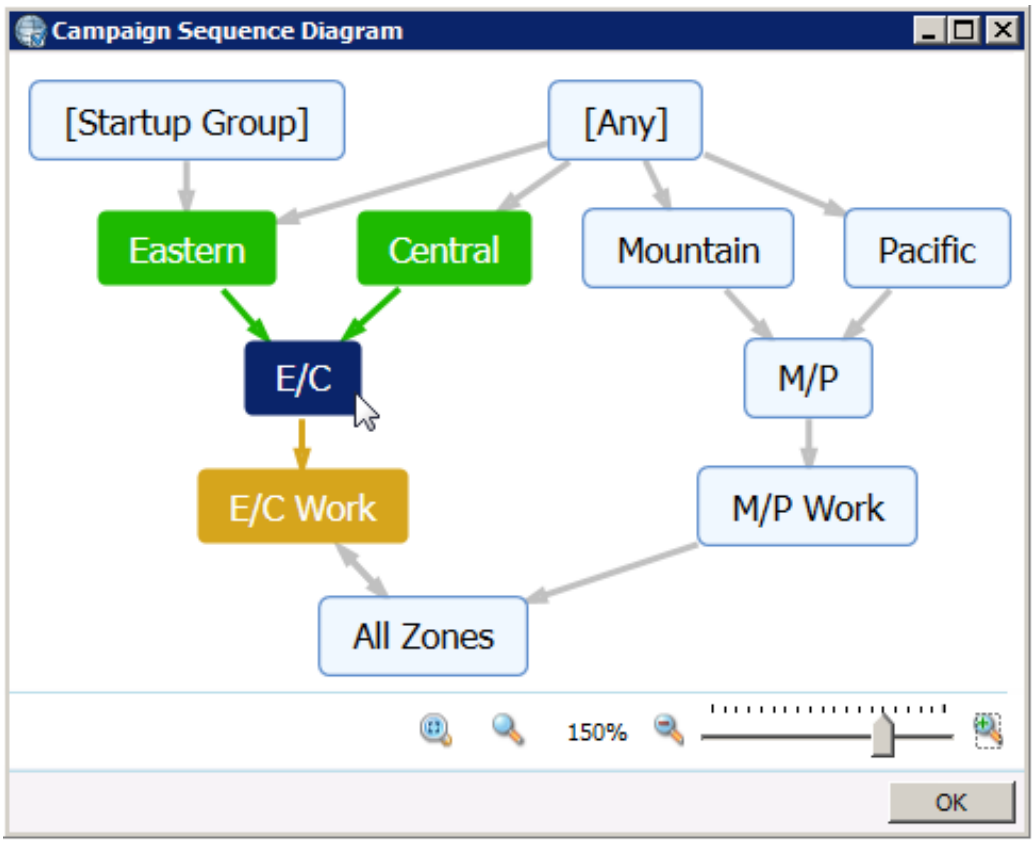


Complex Campaign Sequence Example

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

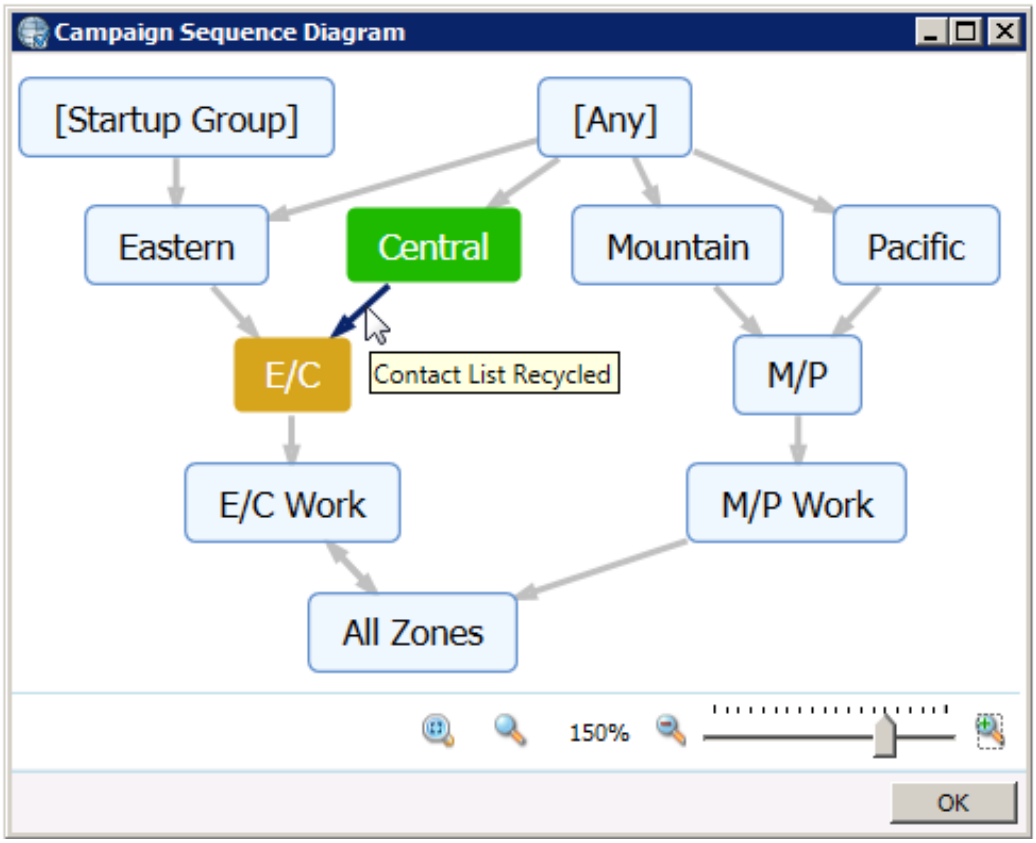
As you build a complex Campaign Sequence, the Campaign Diagram can help you visualize how it will work.



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.

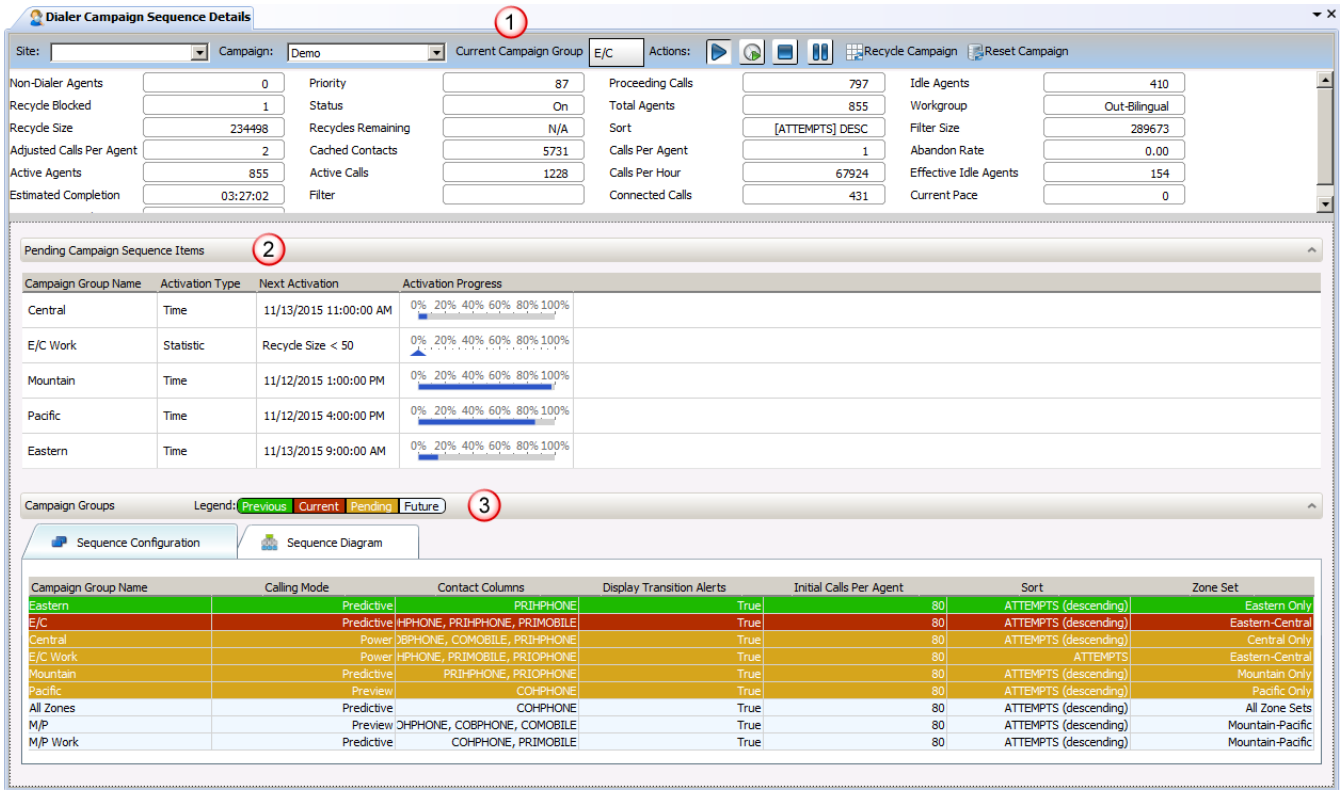
- Blue shows what would be the current campaign sequence item.
- Green shows what would be the previous campaign sequence items.
- Yellow shows what would be the pending campaign sequence items.

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


Campaign Sequence Diagram
[Startup Group]
[Any]
Eastern
Central
Mountain
Pacific
E/C
Contact List Recycled
M/P
E/C Work
M/P Work
All Zones
150%
OK

Dialer Campaign Sequence Details View

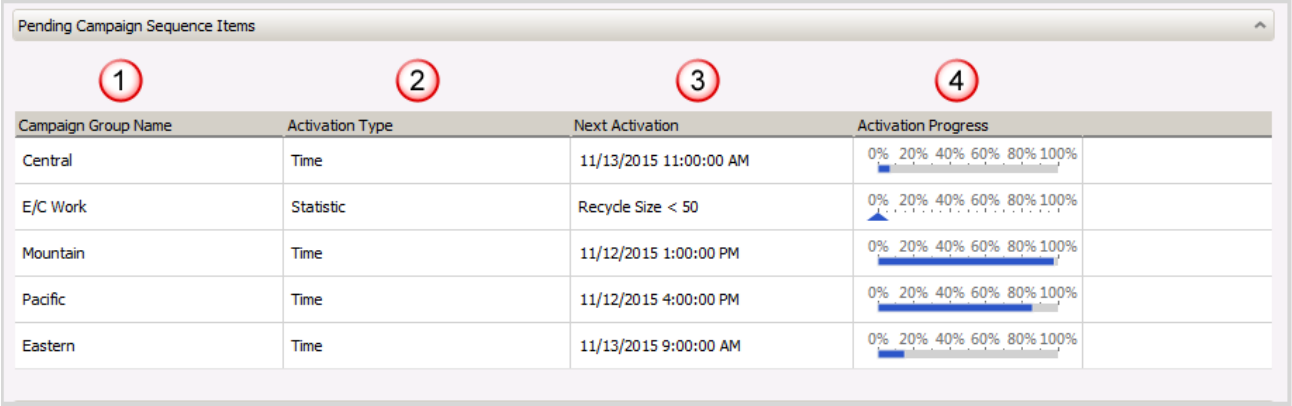
When you install the Advanced Campaign Management Feature License you'll have access to the Dialer Campaign Sequence Details view in IC Business Manager. From here, you can closely monitor all facets of the Campaign Sequence in real time. When a campaign transitions occurs, the screen will momentarily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



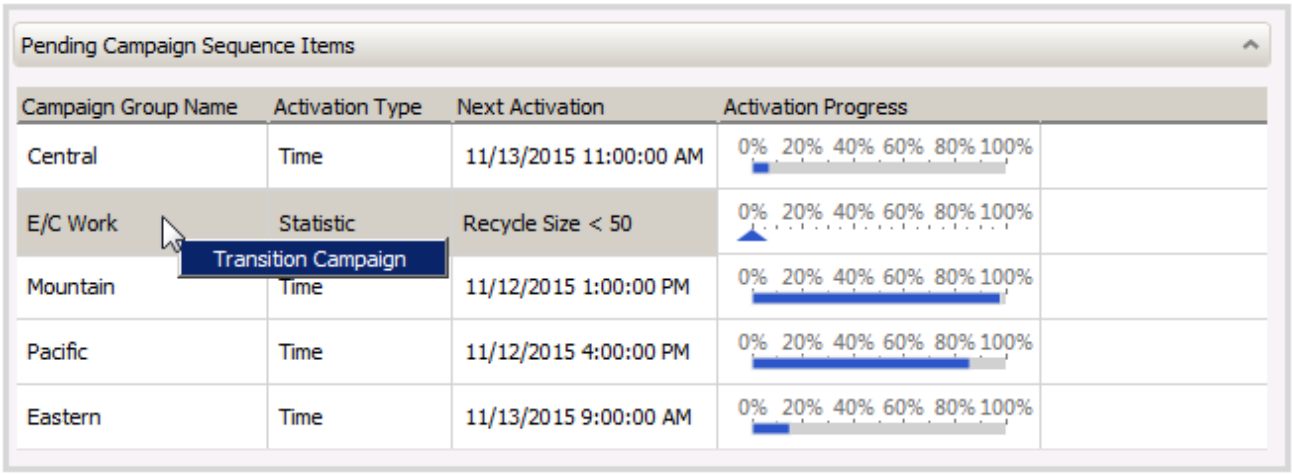
1. Statistics at the top of the view are updated in real-time to indicate the performance of the currently running Campaign Group.
2. The Pending Campaign Sequence Items section shows you all Campaign Groups that have the potential to run next.
3. The Campaign Groups section contains the Sequence Configuration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

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.



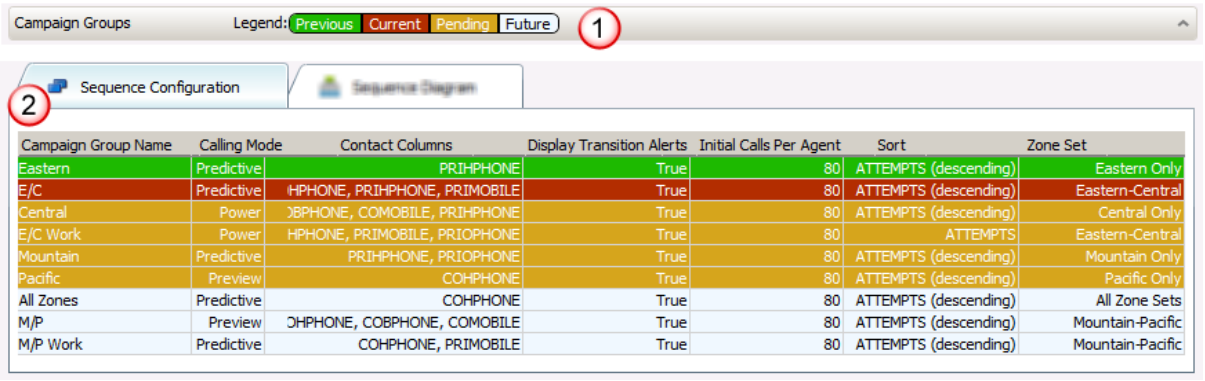
2. Each Campaign Group's assigned Activation Type is shown for easy reference.
3. The configured activation is shown in detail to help you identify what could potentially trigger the next activation.
4. Various progress gauges provide you with an approximation of when the associated activation will trigger 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.



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.

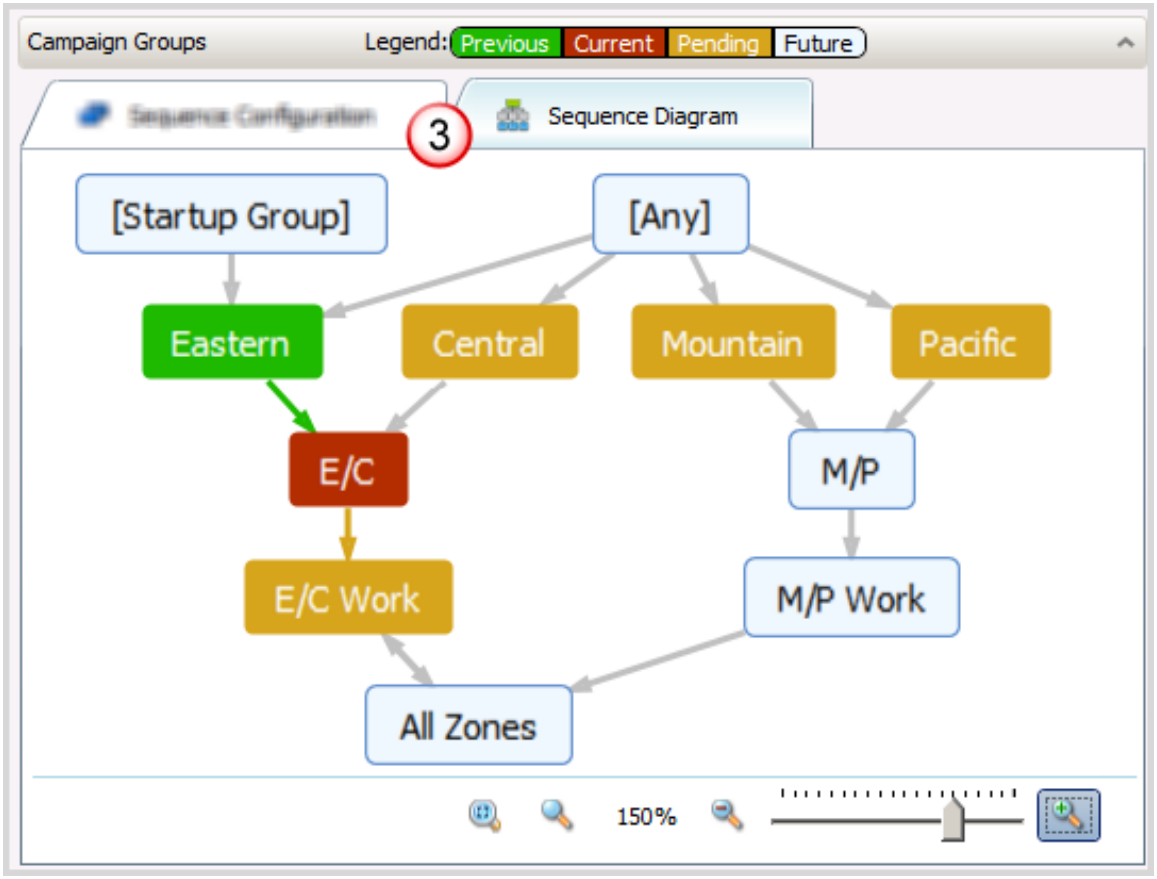
Monitor Campaign Transitions

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.

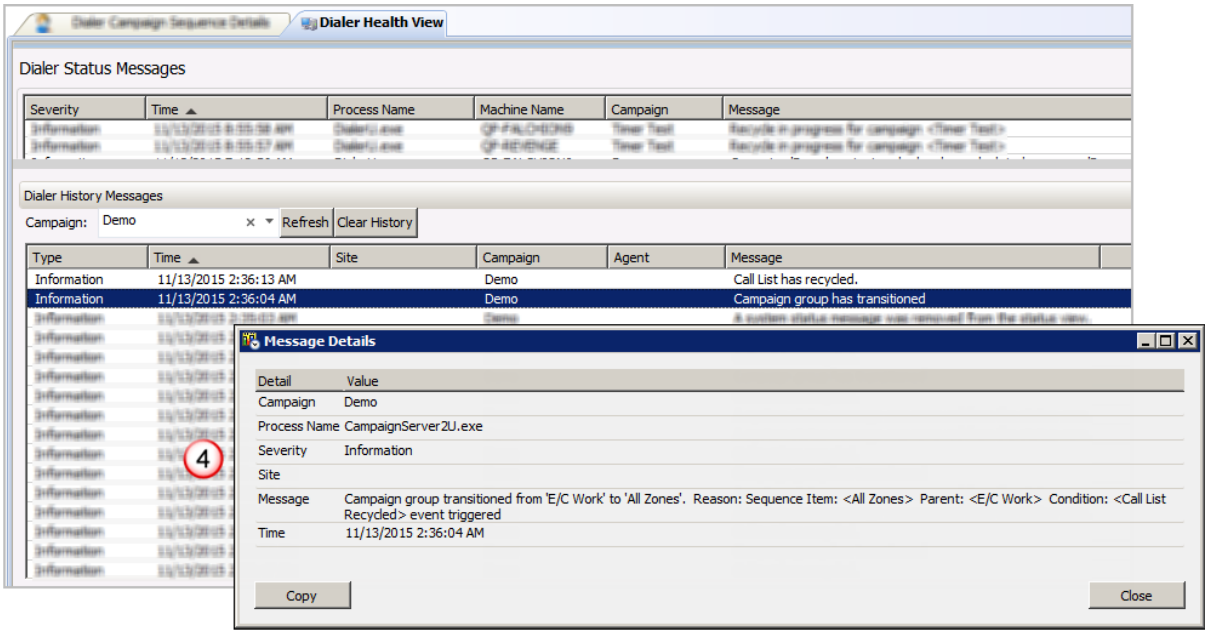


Campaign Group Name	Calling Mode	Contact Columns	Display Transition Alerts	Initial Calls Per Agent	Sort	Zone Set
Eastern	Predictive	PRIHPHONE	True	80	ATTEMPTS (descending)	Eastern Only
E/C	Predictive	HPHONE, PRIHPHONE, PRIMOBILE	True	80	ATTEMPTS (descending)	Eastern-Central
Central	Power	OBPHONE, COMOBILE,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

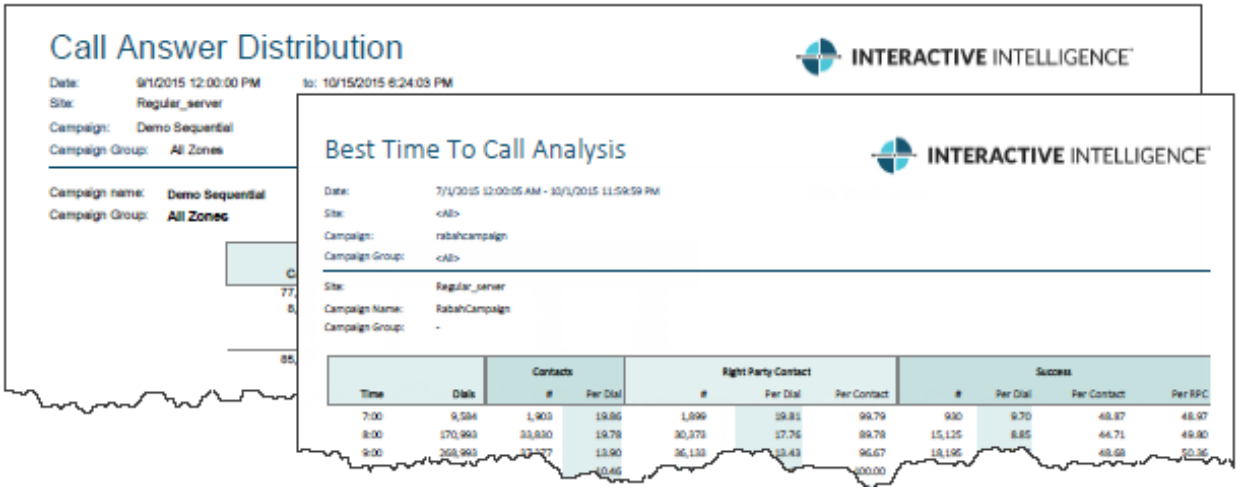
2. The Sequence Configuration tab provides a real-time display of the Campaign Sequence as it is running. It also provides a complete list of all campaign properties and the associated values.
3. The Sequence Diagram tab also provides a real-time display of the Campaign Sequence as it is running. And, 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.



4. 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.



5. 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.



Change Log

The following table lists the changes to the *Interaction Dialer Advanced Campaign Management Overview Guide* since its initial release.

Date	Description
12-Decmeber-2017	Added this Change Log.
14-March-2018	Updated cover page to indicate 2018 R3 release.
14-March-2018	Updated cover page to indicate 2018 R4 release.
24-June-2019	Reorganized the content only, which included combining some topics and deleting others that just had an introductory sentence such as, "In this section...".
09-September-2019	Rewrote the introduction to clarify the relationship between ACM and workflows from Dialer 3.0.