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# **GENESYS**

# **Interaction Feedback**

# **Technical Reference**

### Abstract

This user guide documents the PureConnect Customer Feedback Management solution for customer Post-call surveys and On-demand surveys. Learn how Interaction Feedback, an IC Business Manager application module, allows business users to create customer feedback surveys, analyze survey results, and view the results of surveys in realtime and in Interaction Reporter Interaction Feedback reports.

For the latest version of this document, see the PureConnect Documentation Library at: http://help.genesys.com/pureconnect.

For copyright and trademark information, see https://help.genesys.com/pureconnect/desktop/copyright\_and\_trademark\_information.htm.

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# Introduction

Interaction Feedback<sup>™</sup> is the PureConnect Customer Feedback Management solution for automated post-call and on-demand customer surveys. It allows business users to create and manage customer feedback surveys, analyze survey results, and view the results of surveys in real-time. Interaction Feedback has an intuitive interface with ready-to-use templates to help you build effective satisfaction surveys that ask your customers discerning questions about the quality of their experience with your company's products and services.

This document includes:

- An Overview of Interaction Feedback features and components
- Installation and Configuration information
- Steps to build Interaction Feedback customer surveys
- How to view survey results and real-time monitoring
- Information on accessing Interaction Feedback reports in Interaction Reporter

# About this information

The information in this guide is for business users, contact center managers and supervisors, CIC system administrators, business managers, and report administrators. Users might also include Genesys Business Partners and anyone who is interested in learning how to create customer satisfaction surveys.

# **Referenced information**

Because Interaction Feedback is integrated with Customer Interaction Center, there are additional technical references and guides that are referenced in this document. Documents are available in the PureConnect Documentation Library on your CIC server.

The latest versions of these documents can also be accessed from the <u>PureConnect Documentation Library</u> at <u>https://help.genesys.com/cic</u>.

The following technical references, Help, and links can provide additional information for Interaction Feedback.

- PureConnect Installation and Configuration Guide
- PureConnect Licensing Technical Reference
- Interaction Feedback Help
- Interaction Feedback Tables in the PureConnect Data Dictionary
- IC Business Manager User Interface Help Getting Started
- Interaction Administrator Help
- Interaction Supervisor Help
- Interaction Reporter Help

# **Overview**

Interaction Feedback is an IC Business Manager program module that supports automated post-call customer satisfaction surveys and on-demand surveys. Interaction Feedback gives business users the ability to easily create surveys using the Create Survey Wizard. Surveys can be quickly created with pre-defined industry standard templates. Customized questions can be simply created using Interaction Feedback Tools, for creating prompts and managing questions.

Completed survey results are available for viewing immediately in the Interaction Feedback Client. Business users can get at-aglance information for completed surveys using the Interaction Feedback Dashboard, giving organizations immediate insight into customers' experiences. For more detailed Survey Results, Interaction Feedback has extensive search and filtering capabilities, providing summary and detailed information for specific completed customer surveys.

The Interaction Feedback Statistics View in IC Business Manager provides business users the ability to view real-time statistics for surveys *in progress*—surveys customers are in the process of taking—as well as completed surveys and surveys where participants have opted out or abandoned. Interaction Feedback also takes advantage of the Interaction Supervisor Alerting mechanism in IC Business Manager, which is triggered by survey scores. This allows business users to receive immediate notifications when surveys fail to meet a minimum acceptable score. Real-time monitoring provides valuable customer feedback and helps to understand what you are doing well and what immediate actions might need to be taken to meet customer expectations.

Interaction Reporter reports, available in IC Business Manager, include pre-defined reports for Interaction Feedback. These reports contain summary and detailed information on completed customer satisfaction surveys.

After installation, Interaction Feedback is easily configured in Interaction Administrator. Interaction Feedback settings are configured in its container under System Configuration. Licensing for accessing Interaction Feedback features is also controlled in Interaction Administrator.

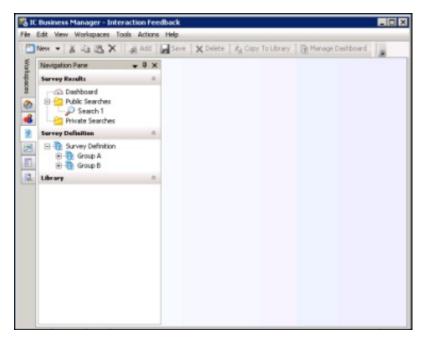
# **Interaction Feedback components**

This section contains a detailed overview of the following Interaction Feedback components.

- Interaction Feedback Client
- Interaction Administrator configuration container for Interaction Feedback
- Interaction Feedback Statistics View in IC Business Manager
- Interaction Feedback reports in Interaction

### Interaction Feedback Client

The Interaction Feedback Client allows you to create effective customer satisfaction post-call surveys and on-demand surveys, and it provides you with the ability to view completed survey results.



### Exploring the client interface

The Interaction Feedback module uses the features of IC Business Manager, making it easy to use.

The following quick explanation of the Interaction Feedback interface is meant to familiarize you with the most important features you'll need to create a survey. You'll find the detailed steps for creating a new survey in "Create a new survey".

For Help while using Interaction Feedback in the workspace, press the F1 key. For additional information on using IC Business Manager menus, toolbars, and Navigation Pane, see IC Business Manager Help. To access this Help, from the **Help** menu click **Getting Started**.

### **Navigation Pane**

The Interaction Feedback navigation pane provides easy access to its survey features in the following navigation panes: Survey Results, Survey Definition, and Library. It provides centralized navigation to survey components, which display their information in the workspace next to the navigation panes.



If the Interaction Feedback navigation pane is not displayed in the IC Business Manager window, from the **View** menu, point to **Navigation pane** and click **Normal**.

#### **Survey Results**

The **Survey Results** navigation pane allows authorized users to display the results of completed surveys in the workspace, using the Dashboard and Searches. Use the **Dashboard** for a quick graphical view of survey results by date. The Dashboard view includes the average score for a survey, the average ranking of a survey, and the number of surveys completed. For more detailed survey results, use the **Public Searches** folder and the **Private Searches** folder to build customized searches. Customized searches can be built with filtering attributes such as Ranking, Scored User, Survey Name, and Survey State.

#### **Survey Definition**

Use the **Survey Definition** navigation pane to: create Survey Groups, which organize surveys; create customer surveys, new or from a template; create new survey questions, or add questions from an existing template; and to activate a survey. Surveys and questions are edited and managed under **Survey Definition**. Surveys and questions can be saved as templates and used when creating new surveys.

#### Library

The Library navigation pane contains survey templates and question templates you create to use when creating surveys.

### Interaction Feedback Toolbar

Interaction Feedback provides Toolbar buttons for frequently used commands.



Toolbar buttons are available depending on the task being performed. For example, when Survey Definition is selected, the

E Add Group button is available.

### **Interaction Feedback Tools**

The Interaction Feedback **Tools** menu provides tools to **Manage Prompts**, **Manage Question Categories**, and **Manage Rankings** for your surveys and questions.

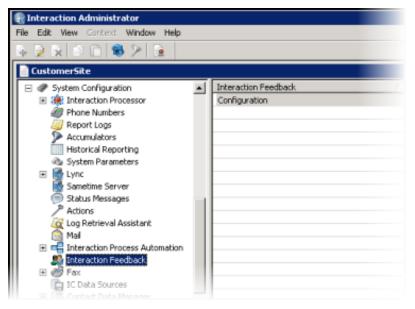
Ele	Edit	View	Go	Too	ık	Actions	Help
Navigation Pane			2	м	anage Pror	npts	
Intera	oction	Feedba	ick	2	м	anage Que	stion Categories
Survey Results		2	М	anage Ran	kings		

### Shortcut menus

The Interaction Feedback interface supports shortcut menus that display the available commands specific to the current selection and context. To display available commands, right-click to see the shortcut menu.

# Interaction Feedback configuration container

Global settings for Interaction Feedback are configured in an Interaction Administrator container under System Configuration.

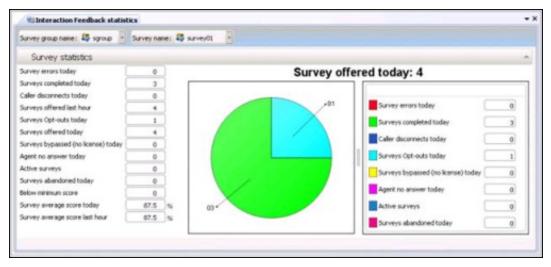


Use the Interaction Feedback Configuration dialog to set file paths for Prompts and Recordings, and to set Audio Compression and Encryption parameters.

ľ	Interaction Feedback Configuration					
	Interaction Feedback Sett	ings Custom Attributes History				
	Prompts Path:	Dilt3/ICIResources//SurveyPrompts				
	Recordings Path:	D:\processed\				
	Audio Compression:	audio/x-truespeech				
All paths are relative to the IC server.						
		OK Cancel	Apply			

# **Interaction Feedback Statistics View**

The Interaction Feedback Statistics View is accessed in IC Business Manager. It provides business users the ability to view realtime statistics for surveys *in progress*—surveys customers are in the process of taking—as well as completed surveys and surveys where participants have opted out or abandoned.



Interaction Feedback real-time monitoring also allows business users to create Alerts for surveys that are in progress.

For complete information on Interaction Feedback Statistics View, see the Interaction Supervisor Help in IC Business Manager.

# **Interaction Feedback Reports**

Interaction Feedback reports are available in Interaction Reporter in IC Business Manager. There are four reports that contain summary and detailed information on completed customer satisfaction surveys. The reports include survey details including: user, average score, percentile, and specific scores by questions. The reports provide information for comparison between different users' average survey scores over time. If Interaction Recorder data is available, a report shows comparisons between survey scores and quality scores.

# Installation and Configuration

Interaction Feedback is an IC Business Manager program module that is installed with PureConnect Customer Interaction Center (CIC) components during CIC installation. If the CIC license includes the Interaction Feedback base license, during CIC server installation Interaction Feedback will be installed and available in Interaction Administrator for configuration.

Consider the following requirements when planning for your Interaction Feedback Installation.

- Software and Hardware requirements
- Database requirements

### Planning for installation

Consider the following requirements when planning for your Interaction Feedback installation.

#### Software and hardware requirements

Interaction Feedback has the same basic software and hardware requirements as the CIC servers, which are described in the *PureConnect Installation and Configuration Guide*, available in the <u>PureConnect Documentation Library</u>.

Please note that Interaction Feedback is not supported on the TAPI Platform.

The latest version of the *PureConnect Installation and Configuration Guide* document can be accessed from the <u>PureConnect</u> <u>Documentation Library</u>.

#### Database requirements

The database space requirements for your CIC system will increase in order to store Interaction Feedback survey information and results. Please refer to the *CIC Database Space Planning Spreadsheet* in the **Technical Reference Documents** section of the <u>PureConnect Documentation Library</u> to determine the space requirements needed for Interaction Feedback.

#### License requirements

Interaction Feedback is licensed separately from CIC. Five Interaction Feedback component licenses are required. Be sure to purchase your Interaction Feedback licenses ahead of the time when you plan to install and test a new installation or upgrade from a previous release. The following licenses are required for Interaction Feedback.

License	Description
I3_ACCESS_FEEDBACK	Interaction Feedback Client workstation access license. This license is required for an IC Business Manager user to access the Interaction Feedback module for survey configuration or results viewing and to view Interaction Feedback statistics within Interaction Supervisor.
	The license is also required for users to have a survey applied to an interaction in which they were a participant.
I3_FEATURE_BASE_FEEDBACK	This license component enables all feature functionality of Interaction Feedback on the CIC server. Having this feature component in the CIC server license bundle enables the Interaction Feedback survey subsystem and the configuration containers in Interaction Administrator. This Server license also enables the Feedback reports.
	Interaction Feedback base license for CIC server installation includes and automatically enables the I3_FEATURE_POST_CALL_FEEDBACK license, which enables post-call surveys, and the I3_FEATURE_INBOUND_FEEDBACK license, which enables on-demand surveys.

#### **Confirming Interaction Feedback licenses**

You can view the licenses on your system in Interaction Administrator by clicking the **File** menu, and then click **License Management**. Confirm that you have the necessary Interaction Feedback licenses on the **Licenses** page and the **Features** page.

#### IC server installation

Interaction Feedback is currently installed in the IC server installation procedure. When IC Server Installation is installed, server licensed components of Interaction Feedback are available and configurable through Interaction Administrator.

#### **Client installation**

Interaction Feedback Client is installed on client workstations using the IC Business Manager Applications workstation install from the PureConnect Customer Interaction Center (CIC) .iso file, located under Workstation. The install creates IC Business Manager shortcuts in the PureConnect folder of the Start Menu and on the Windows desktop.

To run the Interaction Feedback Client install on a workstation, follow these steps.

- 1. If you have not done so already:
  - a. Download the CIC 2015 R1 or later .iso file from the Product Downloads page at <u>https://help.genesys.com/pureconnect/secure/Downloads.aspx</u>
  - b. Copy the .iso file to a file server (non-IC server) with a high bandwidth connection to the workstation(s) on which you will be running the CIC 2015 R1 or later installs.
  - c. Mount the .iso file and share the contents to make them accessible to the workstation(s) on which you will be running the CIC 2015 R1 or later installs.
- 2. Navigate to the \Installs\ServerComponents directory on the file server.
- 3. Copy the IC Business Manager Applications .msi file, for example, ICBusinessManagerApps\_2018\_R1.msi, to the workstation on which you plan to run this install and double-click to launch it.

The IC Business Manager Application Setup wizard starts.

房 IC Business Manager	Applications for CIC 2018 R1 Setup 🗕 🗖 🗙
ဂိုဝ	Welcome to the IC Business Manager Applications Setup Wizard for CIC 2018 R1 The Setup Wizard allows you to change the way IC Business Manager Applications for CIC 2018 R1 is installed on your computer or to remove it from your computer. Click Next to continue or Cancel to exit the Setup Wizard.
<mark>ଟ୍ଟ</mark> GENESYS <sup>-</sup>	
	Back Next Cancel

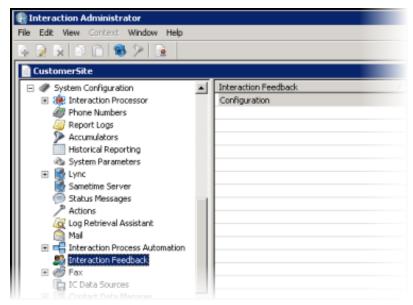
4. On the Welcome screen, click Next.

The Setup wizard guides you through the Interaction Feedback Client installation.

### **Configuring Interaction Feedback**

After installation, use Interaction Administrator to configure Interaction Feedback settings, allocate licenses, and assign access control.

The Interaction Feedback container is in Interaction Administrator under System Configuration.



#### **Configuring settings**

The Interaction Feedback container is in Interaction Administrator under System Configuration.

To configure Interaction Feedback settings, select the **Interaction Feedback** container, and in the configuration pane on the right, double-click **Configuration**. The **Interaction Feedback Configuration** dialog is displayed.

Interaction Feedback Cor	nfiguration	? ×			
Interaction Feedback Settin	Custom Attributes   History				
Prompts Path:	D:\13\1C\Resources\\SurveyPrompts				
Recordings Path:	D:\Compressed Recordings\				
Audio Compression:	audio/x-truespeech				
All paths are relative to the IC server.					
	OK Cancel Ap	ply			

On the Interaction Feedback Settings page, configure the following settings.

#### **Prompts Path**

Type the path from which the survey prompts are loaded. The default value for the prompts is  $C:I3IC\$  when the IC Installation path is C:I3IC.

#### **Recordings** Path

Type the path where the recorded surveys are stored. This is where free-form survey answers are stored. The default value for the recordings is C:\I3\IC\Resources\SurveyRecordings or the recorder recordings directory if configured, when the IC Installation path is C:\I3\IC.

Audio Compression

Select the Audio Compression format to use when compressing survey recordings. The values are: audio/PCMU, audio/PCMA, audio/GSM, audio/x-truespeech, and audio/G726-32. The default value is audio/x-truespeech.

#### **Assigning Access licenses**

Access to Interaction Feedback is controlled through licensing in Interaction Administrator. The Interaction Feedback Access license is required.

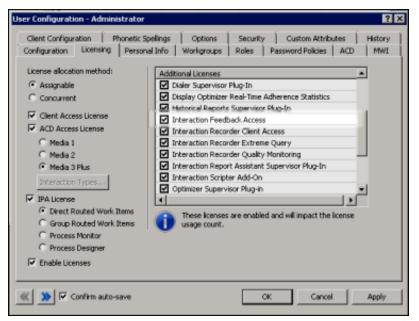
Next, read more about assigning Interaction Feedback licenses.

#### Interaction Feedback Access license

Assign the Interaction Feedback Access license to give a user access to Interaction Feedback in IC Business Manager.

Assigning the Interaction Feedback Access license to a user (agent) allows the results of a survey to be visible to users with the Security **Access Control** to view Feedback survey results. If the agent is *not* assigned the Interaction Feedback Access license, the survey results are not included in survey reports and the survey is considered *unlicensed*.

To assign the Interaction Feedback access license, in Interaction Administrator, select the Users container, and double-click the user name in the right pane. The User Configuration dialog is displayed. Assign the Interaction Feedback Access license on the Licensing tab.



To assign this license, on the **Licensing** page, select the **Interaction Feedback Access** check box. For more information on configuring the **Licensing** page, press F1 to display the Interaction Administrator Help.

#### **Assigning Access Rights**

Access rights for Interaction Feedback are assigned in Interaction Administrator under **People**. Administrator Access and Access Control rights can be configured in the Users or Workgroups configuration dialogs.

#### Administrator Access rights

Administrator Access rights provide the ability to set access control for Interaction Feedback specific access rights in Interaction Administrator. You can assign this access to a user or a workgroup. To grant this access, on the Security page of the Configuration dialog, click Administrator Access.

Workgroup Configuration - support	? ×
Configuration Files Members Roles/Supervisor Phonetic Spellings Analyzer Keyword Sets Options Secu	
Access Rights Change the settings for Access Rights. Master Administrator Allow Administrative Access editing Allow Access Control editing	Administrator Access Access Control
Security Rights Change the settings for Security Rights.	Security Rights
K 🔊 🔽 Confirm auto-save	OK Cancel Apply

Under Interaction Feedback select the Interaction Feedback Administrator Access check box.

ministrator Access		
Category: <al></al>	Search:	Clear
Show only selected items and groups	i	
Name	Administrator Access Inherited From	
Interaction Conference		
Interaction Conference		
Interaction Conference Rooms		
*[AI]		
Interaction Feedback		-
Interaction Feedback	<b>~</b>	
Interaction Files		
*[AI]		
Advanced Access Details		
HAVE NEW PROCESS STOLES		Close

#### **Access Control rights**

Access Control rights provide the ability to View and Modify Interaction Feedback surveys and groups. There are two categories of Access Control, View or Modify Feedback Survey Groups and View or Modify Feedback Surveys.

Access Control rights for Interaction Feedback are assigned in Interaction Administrator under **People**. Access Control rights are configured in the **Users** or **Workgroups** configuration dialogs.

To grant this access, on the Security page of the Configuration dialog, click Access Control.

User Configuration - Operator	? X
Client Configuration Phonetic Spellings Options Security	word Policies ACD MWI Custom Attributes History
Access Rights Change the settings for Access Rights.  Master Administrator Allow Administrative Access editing Allow Access Control editing	Administrator Access
Security Rights Change the settings for Security Rights.	Security Rights
Confirm auto-save	Cancel Apply

On the Access Control dialog, under Feedback Surveys, under Feedback Surveys, select the group or survey View or Modify check box.

Access Control								
Category: <ai></ai>		٠	Search:					Clear
F Show only selected items and groups								
Name	View	Modify	Monitor	Search	Statistics	Restrict	Login La	sunch 🔺
*[AI]								_
Feedback Surveys								
*[All Group A (Survey Group)]	<b>*</b>	~						
*[All Group B (Survey Group)] *[All]								
[All Groups]	Н	Н						
test 1	× 1							
test A2								
test B1								
Test B2								
								ت
<u>.</u>								<u> </u>
Advanced Access Details							_	
								Close

### Starting the Interaction Feedback Client

To start the Interaction Feedback Client, from the Desktop, double-click the IC Business Manager icon.



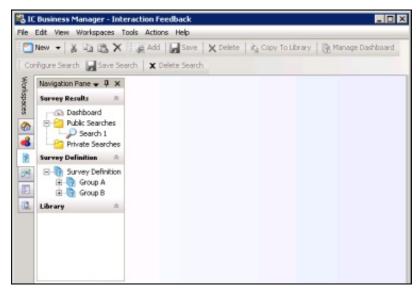
The IC Business Manager logon dialog is displayed.

🌄 IC Bu	siness Manager	×	I
<u>5</u>	Use Windows	Login Authentication	
	Name:	icadmin	
	Password:	••••	
		Save Password	
2	Host:	CSS1	
		Login	

Use your CIC server credentials and the name of your CIC server Host to log on to IC Business Manager.

#### Interaction Feedback module

When you log on, the Interaction Feedback module is displayed in the IC Business Manager window. If the Navigation Pane is not displayed, on the menu bar, click **View**, point to **Navigation Pane**, and select **Normal**.



#### **Getting Started Help**

To view an online Getting Started Help for IC Business Manager modules, click the Help menu, and then click Getting Started.

The Interaction Feedback Help is also available from the IC Business Manager Help menu.

# **About Interaction Feedback customer surveys**

Interaction Feedback provides a simple solution to building surveys for measuring customer satisfaction. There are two types of surveys, Post-Call Survey and On-Demand Survey. An Interaction Feedback automated survey assists you in gathering and analyzing customer feedback faster and better than conventional survey methods.

An Interaction Feedback post-call survey contains:

- Rule Conditions that determine which customer calls will be offered the opportunity to take a survey.
- **Prompts** which invite the customer to take a survey, welcome the customer to the survey, and thank the customer for taking the survey.
- Questions that measure a customer's perception on satisfaction with the overall experience of the call, customer feedback on the agent's skills and knowledge, and the likelihood that the customer might buy or recommend your company's products.

An on-demand survey contains Prompts and Questions.

### **Overview of creating Interaction Feedback surveys**

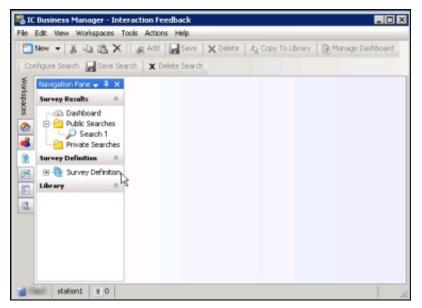
The basic steps in creating a survey are:

- 1. Create a survey group
- 2. Create a survey
- 3. Add questions to the survey
- 4. Activate the survey

This section contains an *overview* of these basic steps to create a customer survey. Detailed instructions for creating post-call surveys and on-demand surveys are later in this document. You'll find the detailed steps for creating a new survey in "Create a new survey".

#### Creating a survey group

Create survey groups to organize surveys into logical groups and to control user access to those surveys. To create a group, from the Interaction Feedback **Navigation Pane**, under **Survey Definition**, select **Survey Definition**.



The Add Group button is now available on the Toolbar.



Next, click the Add Group button. In the Create New Group dialog, type a Name and Description for your new group, and click

**OK**. The new survey group is added to the bottom of the survey group list and is indicated by the group icon. The next time Interaction Feedback is started, your survey group name is displayed in alphabetical order.

#### Adding a survey to a group

Use the **Create Survey Wizard** to add a new survey to a group. There are two types of surveys that can be created: **Post-Call** survey in which the caller chooses to participate, or an **On Demand** survey that is initiated through Interaction Attendant. To create a survey, under **Survey Definition**, select the survey group to which you want to add a survey.

The Add Survey button is now available

To add a new survey, click Add Survey. The Create Survey Wizard starts.



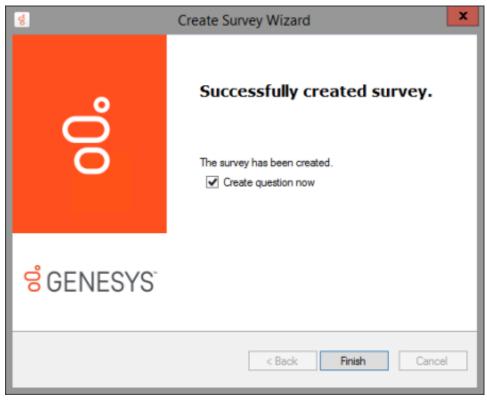
Click Next and follow the wizard instructions to create a new survey.

#### Add questions to a survey

Use the **Create Question Wizard** to add questions to a survey. Questions can be added when you are creating a survey, or you can add questions to an existing survey.

#### Add questions when creating a survey

Questions can be added at the completion of the Create Survey Wizard by selecting the **Create question now** check box.



When you click Finish the Create Question Wizard is started.

륗	Create Question Wizard
	Welcome to the new question creation wizard.
°°°	This wizard will guide you through the process of creating one or more survey questions.
명 GENESYS <sup>-</sup>	Press Next to continue.
	< Back Next > Cancel

Follow the wizard instructions to create one or more survey questions. For more information on using the wizard, see <u>Create</u> <u>Question Wizard</u>.

#### Add questions to an existing survey

on

To add questions to an existing survey, under the survey group, select the survey and click Add Question the toolbar. The Create Question Wizard is started.

<del>6</del>	Create Question Wizard
_0	Welcome to the new question creation wizard.
00	creating one or more survey questions.
영GENESYS <sup>-</sup>	Press Next to continue.
	< Back Next > Cancel

The wizard guides you through the process of creating questions for your survey. For more information on using the wizard, see <u>Create Question Wizard</u>. You'll find the detailed steps for creating a new survey beginning.

#### Activate a survey

Activating a survey makes it available to IC server for post-call and on-demand customer surveys. An active survey cannot be modified.

There are two ways to activate a survey, in the <u>Survey</u> view and in the <u>Survey Activation</u> view.

#### Activate a survey in Survey view

To activate a survey while viewing a survey:

1. In the **Survey Definition** pane, select the name of the survey to be activated. The survey is displayed in the workspace.

Contact	Center Survey	0	Activate
Name	Contact Center Survey	]	
Description			
Rank Group	Tens System		
Record	calls that use this survey		
Minimum Ac	ceptable Score 🛛 📑 🕖		
Rule P	rompts		
Rule Conditio	ons		
	ted to these workgroups: <workgroups> following callers (ANI): <phone numbers=""></phone></workgroups>		

2. Click Activate

#### Activate a survey in Survey Activation view

To activate a survey from a list of all available surveys:

 In the Survey Definition pane, select Survey Definition. The Survey Activation view is displayed in the workspace.

Activate

	Celete   🚓 Copy To Library		Dashboard	Configure Sea	rch 📕 Save Search   🗙 Delete Search
Anoperon Face + 3 X Servey Receilt A Databand Comp Search 1 Servey Calastics A Servey Calastics A Comp Search 1 Comp Se	Total surveys defined Total surveys activated Nome Track D2 Total D1 Total D2 Total D2 Total D2 Total D2 Total D2	4 1 Group B Group A Group A	Addive Palse Palse True False	Phoney 4 3 2 1	Up     Up     Activate     Deschaste

2. Select the name of the survey you want to activate.

3. Click Activate



#### Deactivate a survey

In order to modify an activated survey, it must be deactivated.

To deactivate a survey in the Survey view, from the survey displayed in the workspace, click

To deactivate a survey in the Survey Activation view, from the list of surveys displayed in the workspace, select the survey Name

🔀 Deactivate

and click Deactivate

When you click **Deactivate**, a confirmation dialog is displayed with three choices: **Yes**, **No**, or **Cancel**.

Yes	When you choose Yes, all previous survey results will be purged, and the survey is deactivated.	
No	When you choose <b>No</b> , survey results are not purged and the survey is deactivated. Previous survey results will be mixed with new survey results. Consider selecting No if you are changing something minor. However, this might cause confusion in long-term reporting, for example if you add a new question.	
Cancel	When you choose <b>Cancel</b> , survey results are not purged and the survey is not deactivated.	

Those are the basic steps for creating and activating a survey. Next you'll read about creating specific Interaction Feedback postcall surveys and on-demand surveys.

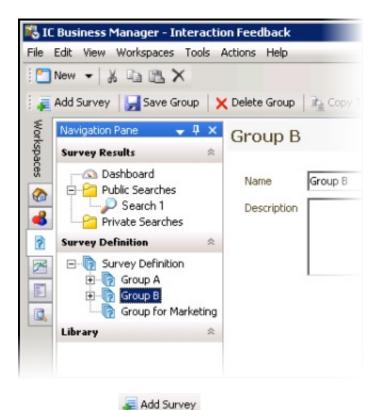
# Create a new survey

You can create a customized <u>post-call survey</u> or an <u>on-demand survey</u> using the Create Survey Wizard. Building a customized survey allows you to create your own rule conditions, prompts, and questions to ask your customers the specific questions you want to measure.

### Create a post-call survey

Follow these steps to create a post-call survey.

1. Under Survey Definition, select the survey group for which you want to create a survey.



2. Click Add Survey

The Create Survey Wizard is started.

d Create Survey Wizard			
	Welcome to the new survey creation wizard		
°°°	This wizard will guide you through the creating of a new survey.		
<mark>ੳ</mark> GENESYS <sup>-</sup>	Press Next to continue.		
	< Back Next > Cance	ł	

3. On the Create Survey Wizard Welcome page, click Next. The Library Selection page is displayed.

100	Create Survey Wizard	×
Library Sel	ection	
Choose from	n an available survey template if desired.	
	Create new survey	
	Create survey from library	
Í		
,		
	< Back Next > C	ancel
		_

#### Note:

As this is a new survey, you will not be selecting a template from the Library.

4. Select Create new survey, and click Next.

The Survey Type Selection page is displayed.

Create Survey Wizard
Survey Type Selection
Choose the type of survey to create.
<ul> <li>Post-Call Create a post call survey in which the caller chooses to participate. The caller is then presented the survey when the agent disconnects.</li> </ul>
<ul> <li>On Demand Create an on demand survey which can be initiated through Interaction Attendant.</li> </ul>
< Back Next > Cancel

5. On the Survey Type Selection page, select Post-Call and click Next. The Survey Settings page is displayed.

8	Create Survey Wizard
Survey	Settings
Provide	survey name and description.
Type Name	Post-Call
Description	required
Rank Group	None    required
Record of	alls that use this survey
Minimum Acc	ceptable Percentage 0
	< Back Next > Cancel

- 6. On the Survey Settings page, type a Name and Description for your new survey.
- 7. Select a **Rank Group** for your survey. For more information, see <u>Define a Rank Group</u>.
- 8. If you want to record the audio for this survey, select the **Record calls that use this survey** check box. Do not select this box if you use Interaction Recorder to record calls.
- 9. Enter a **Minimum Acceptable Percentage** for this survey. This is the value that is used to create Alerts in Interaction Supervisor.

10. Click Next, the Survey Invitation Conditions page is displayed.

d Create Survey Wizard	×
Survey Invitation Conditions	
Select condition(s) to use when offering this survey.	
Rule Conditions	^
calls routed to these workgroups: <workgroups> from the following callers (ANI): <phone numbers=""> calls to these numbers (DNIS): <phone numbers=""> every <nth> call</nth></phone></phone></workgroups>	=
(max> number of surveys per day)	
between these times <start time=""> and <end time=""> between these dates <start date=""> and <end date=""></end></start></end></start>	~
Rule description (Click a highlighted value to edit):	
< Back Next >	Cancel

On the Survey Invitation Conditions page select the conditions to use when offering this survey.

1. In the Rule Conditions box, select one or more rules to decide when this survey will be offered.

Create Survey Wizard	x
Survey Invitation Conditions	
Select condition(s) to use when offering this survey.	
Rule Conditions	
Calls routed to these workgroups: <workgroups>     from the following callers (ANI): <phone numbers="">     calls to these numbers (DNIS): <phone numbers="">     every <nth>&gt; call      every <nth>&gt; call     (max&gt; number of surveys per day     I between these times <start time=""> and <end time="">     between these dates <start date=""> and <end date="">     Rule description (Click a highlighted value to edit);</end></start></end></start></nth></nth></phone></phone></workgroups>	
calls routed to these workgroups: <workgroups> between these times <start time=""> and <end time=""></end></start></workgroups>	
< Back Next > Canc	el

- 2. In the **Rule description** box, click a highlighted variable for each rule to specify a value.
- 3. In the value dialog that is displayed, enter the requested value for the rule, and click **OK**. The specified values are displayed in the **Rule description** box.

d Create Survey Wizard		x
Survey Invitation Conditions		
Select condition(s) to use when offering this survey.		
Rule Conditions	^	
calls routed to these workgroups: <workgroups> from the following callers (ANI): <phone numbers=""> calls to these numbers (DNIS): <phone numbers=""></phone></phone></workgroups>	=	
<ul> <li>✓ every <nth> call</nth></li> <li>(max&gt; number of surveys per day)</li> <li>✓ between these times <start time=""> and <end time=""></end></start></li> </ul>		
Bule description (Click a highlighted value to edit):	Ŷ	
calls routed to these workgroups: CompanyOperator between these times 7:05 AM and 8:05 PM every <nth> call</nth>		
< Back	Vext > (	Cancel

#### Note:

Rule Condition values are case sensitive. When setting a Rule Condition  $\leq value > for an \leq attribute >$ , the specified value must be an exact match to the value of the Attribute associated with the call. For example, if the call attribute has a value of true and the Rule Condition value is set to True, the survey will not be offered.

4. Click **Next** to continue.

The Survey Prompts page is displayed.

.

On the Survey Prompts page, select the prompts for users when deciding to take the survey.

You can preview available prompts, or create a new prompt from this page.

The Invitation prompt can be configured to automatically present the survey to your customer. For more details, see the following information on configuring the Invitation prompt.

1. In the **Invitation** box, select a prompt that invites the customer to participate in this survey. This prompt is presented to the caller at the beginning of the interaction to participate in a survey at the end of the call. To preview the selected prompt, click

the	play	button	ļ

#### Note:

To automatically present a survey to the caller, configure the Invitation prompt to None.

To create a new prompt, select [add recording].

Rule F	Prompts		
Invitation:	Standard Invitation		
	None	~	
Opt-in:	[add recording]		
	Customer Satisfaction 1		
Opt-out:	Customer Satisfaction 2		
	Customer Satisfaction 3		
Welcome:	Driver - CSR Communication Skills - Instructions		
	Driver - CSR Communication Skills 1		
Finish:	Driver - CSR Communication Skills 2		
	Driver - CSR Demeanor - Instructions		

#### The Prompt Edit dialog is displayed.

Prompt Edit	x
Prompt Audio O Station handset record Telephone Handset V Station:	✓ Record
Wav file selection     File:     Browse	
Listen to Prompt Play To: PC Speakers	Play
Prompt Information Name: * required Enter text-to-speech that will play if prompt is unavailable	
Save	

#### **Prompt Audio**

To record an audio prompt from your telephone, select **Station handset record**, and click **Record**. To use an existing audio file for your prompt, select **WAV file selection**, and click **Browse** to select the file path.

#### Listen to Prompt

To listen to the prompt, in the Play To box, select the output device, and click Play.

#### **Prompt Information**

Type the name for this prompt in the **Name** box. Type the full text of this prompt in the **Enter text-to-speech that** will play if prompt is unavailable box.

When you have completed the **Prompt Edit** dialog, click Save.

2. In the **Opt-in** box, select a prompt that recognizes that the customer has chosen to take the survey, and it requests that the customer stay on the line after the interaction has concluded.

You can preview available prompts by clicking the play button

Or you can create your own Opt-in prompt by selecting [add recording].

3. In the Opt-out box, select a prompt that recognizes that the user has chosen not to take the survey.

You can preview available prompts by clicking the play button

Or you can create your own Opt-out prompt by selecting [add recording].

4. In the **Welcome** box select a prompt that welcomes the customer to the survey and provides instructions on how to take the survey, such as how to repeat a question or how to skip a question.

You can preview available prompts by clicking the play button **C**. *Or* you can create your own Welcome prompt by selecting **[add recording]**.

5. In the **Finish** box, select a prompt that is played at the completion of the survey.

You can preview available prompts by clicking the play button

Or you can create your own Finish prompt by selecting [add recording].

#### 6. Click Create.

You have successfully created your post-call survey, and you have the following options:

- You can add questions to your survey by selecting the Create question now check box, and clicking Finish, which displays the Create Question Wizard
- You can click **Finish** and add questions later. When you click **Finish**, the survey is added to the end of the list of surveys in the survey group.

<b>6</b>	Create Survey Wizard	x
°00	Successfully created survey. The survey has been created. Create question now	
<mark>ଟ</mark> ୍ଚ GENESYS <sup>™</sup>		
	< Back Finish Cano	el

A new custom survey is indicated by a survey icon

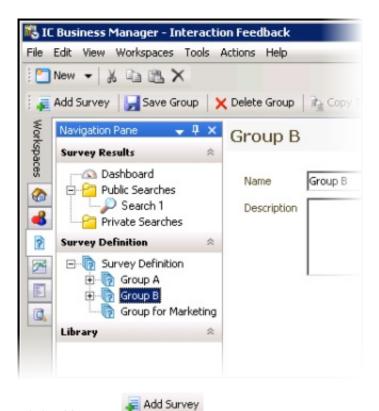
### Create an on-demand survey

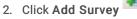
#### Note:

On-demand surveys are initiated in Interaction Attendant. For detailed instructions on adding an on-demand survey to an Interaction Attendant profile, see the Help topic, "Add inbound IVR surveys to Interaction Attendant profiles" in the *Interaction Attendant Help*.

Follow these steps to create an on-demand survey.

1. Under Survey Definition, select the survey group for which you want to create a survey.





The Create Survey Wizard is started.

Create Survey Wizard		
°00°	Welcome to the new survey creation wizard This wizard will guide you through the creating of a new survey.	
<mark>ទ</mark> ំGENESYS <sup>-</sup>	Press Next to continue.	
	< Back Next > Cancel	

3. On the **Create Survey Wizard** Welcome page, click **Next**. The **Library Selection** page is displayed.

8	Create Survey Wizard	x
Library Sel	ection	
Choose from	n an available survey template if desired.	
۲	Create new survey	
0	Create survey from library	
		_
	< Back Next > C	ancel

### Note:

As this is a new survey, you will not be selecting a template from the Library.

4. Select Create new survey, and click Next.

The Survey Type Selection page is displayed.

d Create Survey Wizard	x
Survey Type Selection	
Choose the type of survey to create.	
<ul> <li>Post-Call Create a post call survey in which the caller chooses to participate. The caller is then presented the survey when the agent disconnects.</li> </ul>	
<ul> <li>On Demand Create an on demand survey which can be initiated through Interaction Attendant.</li> </ul>	
< Back Next > Cance	

5. On the Survey Type Selection page, select On Demand and click Next. The Survey Settings page is displayed.

1	Create Survey Wizard	×
Survey	Settings	
Provide	e survey name and description.	
Туре	On Demand	
Name	required	
Description		
Rank Group	None Y required	
Record of	calls that use this survey	
Minimum Ac	cceptable Percentage 0	
	< Back Next > 0	Cancel

- 6. On the Survey Settings page, type a Name and Description for your new survey.
- 7. Select a Rank Group for your survey.
- 8. Enter a Minimum Acceptable Percentage for this survey.

This is the value that is used to create Alerts in Interaction Supervisor.

9. Click Next.

The Survey Prompts page is displayed.

형	Create Survey Wizard	×
Survey	y Prompts	
Selec	t the prompts to use for this survey.	
Welcome:	Standard Welcome 🗸	
Finish:	Standard Finish 🗸	
		- 1
		- 1
		- 1
		- 1
		- 1
		- 1
		- 1
		. I
	< Back Create Cancel	- 1

On the **Survey Prompts** page, select the prompts to use for this survey. You can preview available prompts, or create a new prompt from this page.

1. In the **Welcome** box, select a prompt that welcomes the customer to the survey and provides instructions on how to take the survey, such as how to repeat a question or how to skip a question.

To preview the selected prompt, click the play button To create a new prompt, select [add recording].

형	Create Survey Wizard		x		
Surve	Survey Prompts				
Selec	t the prompts to use for this survey.		- 1		
Welcome:	Standard Welcome	~			
Finish:	None <b>add recording</b> Customer Satisfaction 1 Customer Satisfaction 2 Customer Satisfaction 3 Driver - CSR Communication Skills - Instructions Driver - CSR Communication Skills 1 Driver - CSR Communication Skills 2 Driver - CSR Demeanor - Instructions Driver - CSR Demeanor 1 Driver - CSR Demeanor 2 Driver - CSR Knowledge - Instructions Driver - CSR Knowledge 1 Driver - CSR Knowledge 1 Driver - CSR Knowledge 2 Driver - CSR Knowledge 2 Driver - Image 1 Driver - Image 1 Driver - Iwage 2 Driver - IVR 1 Driver - IVR 2 Driver - Problem Resolution - Instructions Driver - Problem Resolution 1 Driver - Problem Resolution 2				

The Prompt Edit dialog is displayed.

Prompt Edit	x
Prompt Audio         O Station handset record         Telephone Handset       Y         Record	
Wav file selection     File:     Browse	
Listen to Prompt Play To: PC Speakers  ✓  Play	
Prompt Information Name:  required Enter text-to-speech that will play if prompt is unavailable	
Save Cancel	

#### **Prompt Audio**

To record an audio prompt from your telephone, select **Station handset record**, and click **Record**. To use an existing audio file for your prompt, select **WAV file selection**, and click **Browse** to select the file path.

#### **Listen to Prompt**

To listen to the prompt, in the **Play To** box, select the output device, and click **Play**.

#### Prompt Information

Type the name for this prompt in the **Name** box. Type the full text of this prompt in the **Enter text-to-speech that** will play if prompt is unavailable box.

When you have completed the **Prompt Edit** dialog, click **Save**.

2. In the **Finish** box, select a prompt that is played at the completion of the survey.

You can preview available prompts by clicking the play button

Or you can create your own Finish prompt by selecting [add recording].

- 3. Click Create. You have successfully created your on-demand survey, and you have the following options:
  - You can add questions to your survey by selecting the **Create question now** check box, and clicking **Finish**, which displays the **Create Question Wizard** 
    - You can click **Finish** and add questions later. When you click **Finish**, the survey is added to the end of the list of surveys in the survey group.

영	Create Survey Wizard
°00	Successfully created survey. The survey has been created. Create question now
<mark>ଟ୍</mark> ଚ GENESYS <sup>-</sup>	
	< Back Finish Cancel
new custom survey is indicated	by a survey icon .
	iated in Interaction Attendant. An on-demand survey must be Attendant. For more information, see <u>Activate a survey</u> .

## Add an on-demand survey to Interaction Attendant profile

On-demand surveys are initiated in Interaction Attendant. For detailed instructions on adding an on-demand survey to an Interaction Attendant profile, see the Help topic, "Add inbound IVR surveys to Interaction Attendant profiles" in the Interaction Attendant Help.

## Edit a survey

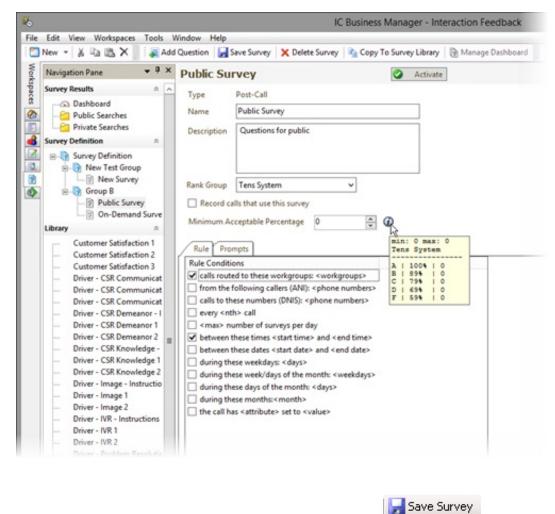
To edit the settings for a survey, in the **Survey Definition** pane select the survey name under its group. The survey settings are displayed in the workspace.

## Set the Minimum Acceptable Percentage

Use the **Minimum Acceptable Percentage** field to set a minimum score for a survey. Enter the Minimum Acceptable Percentage as a percentage of the maximum score for the survey. Click the information icon, next to the **Minimum Acceptable Percentage** box, to display a tooltip that assists you in selecting the percentage for the minimum acceptable score for the survey. The Minimum Acceptable Percentage is the value that is used for Alert notification in Interaction Supervisor.

Minimum Acceptable Percentage	0	÷ 1

The tooltip is displayed next to the Minimum Acceptable Percentage box.



When you have completed making your changes, click Save Survey

# Add questions to a survey

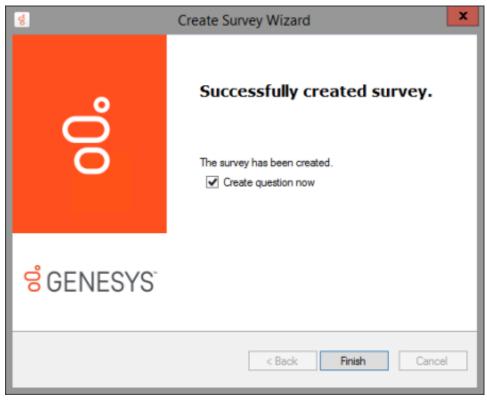
The **Create Question Wizard** will guide you through the process of creating a new question for your survey, or choosing an existing question template. Here's how to <u>add questions to a survey</u>.

## Add questions to a survey

Use the **Create Question Wizard** to add questions to a survey. Questions can be added when you are creating a survey, or you can add questions to an existing survey.

#### Add questions when creating a survey

Questions can be added at the completion of the Create Survey Wizard by selecting the **Create question now** check box.



When you click Finish the Create Question Wizard is started.

륗	Create Question Wizard
	Welcome to the new question creation wizard.
°°°	This wizard will guide you through the process of creating one or more survey questions.
명 GENESYS <sup>-</sup>	Press Next to continue.
	< Back Next > Cancel

Follow the wizard instructions to create one or more survey questions. For more information on using the wizard, see <u>Create</u> <u>Question Wizard</u>.

## Add questions to an existing survey

on

To add questions to an existing survey, under the survey group, select the survey and click Add Question the toolbar. The Create Question Wizard is started.

6	Create Question Wizard
ဝိုင်	Welcome to the new question creation wizard. This wizard will guide you through the process of creating one or more survey questions.
<mark>ଟ</mark> GENESYS <sup>-</sup>	Press Next to continue.
	< Back Next > Cancel

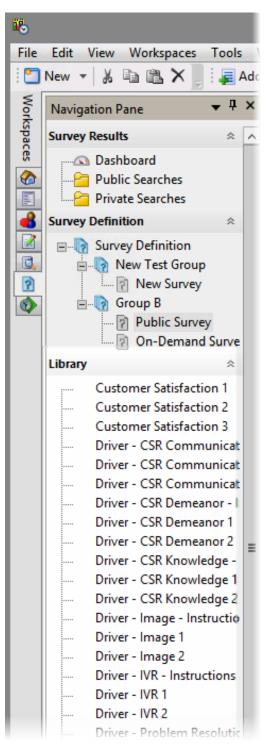
The wizard guides you through the process of creating questions for your survey. For more information on using the wizard, see <u>Create Question Wizard</u>. You'll find the detailed steps for creating a new survey beginning.

## **Question templates**

Question templates contain the question settings, including prompts and response values, and can save time when creating a survey. You can choose question templates that you have created, from the Library.

## Library

The Library pane contains the question templates that are available for your surveys.



## **Question Descriptions**

To view the description of a question, from the Library, pause the mouse pointer on the question without clicking. The question description is displayed.

		IC Business Manager - Inte	raction Feedback
Edit View Workspaces Tools			
New - 🐰 🗟 🕰 🗙 📕 🗸 Adi	d Question 🛛 🙀 Save Survey 🗙 Delete Sur	vey 🔄 Copy To Survey Library	Manage Dashboard
Navigation Pane 👻 🕸 🗙	Public Survey	Activate	
Survey Results *	Type Post-Call		
Dashboard     Public Searches	Name Public Survey		
Private Searches	Description Questions for public		
Survey Definition			
Survey Definition			
New Survey	Rank Group Tens System	~	
Group B	Record calls that use this survey		
On-Demand Surve		ē Ø	
Library A	Minimum Acceptable Percentage 0	÷ 0	
Customer Satisfaction 1	Rule Prompts		
<ul> <li>Customer Satisfaction 2</li> </ul>	Rule Conditions		
- Customer Satisfaction 3	Calls routed to these workgroups: <w< td=""><td>advances.</td><td></td></w<>	advances.	
<ul> <li>Driver - CSR Communicat</li> </ul>	from the following callers (ANI): philling callers (ANI):		
<ul> <li>Driver - CSR Communicat</li> </ul>			
<ul> <li>Driver - CSR Communicat</li> </ul>	calls to these numbers (DNIS): <phore< td=""><td>se numbers&gt;</td><td></td></phore<>	se numbers>	
<ul> <li>Driver - CSR Demeanor - I</li> </ul>	every <nth> call</nth>		
<ul> <li>Driver - CSR Demeanor 1</li> </ul>	max> number of surveys per day		
<ul> <li>Driver - CSR Demeanor 2</li> </ul>	between these times <start time=""> an</start>	d <end time=""></end>	
<ul> <li>Driver - CSR Knowfedge -</li> </ul>	between these dates <start date=""> and</start>	d < end date>	
<ul> <li>Driver - CSR Knowledge 1</li> </ul>	during these weekdays: <days></days>		
- Driver - CSR Know Think nov	w about the Customer Service Representative	's knowledge. On a scale from 1 to !	9, with 1 being Poor and 9 being Exceller
Driver - Image - Instructio	during these days of the month: <da< td=""><td></td><td></td></da<>		
- Driver - Image 1			
- Driver - Image 2	during these months: < month>		
	the call has <attribute> set to <value></value></attribute>		
<ul> <li>Driver - IVR - Instructions</li> </ul>			

## **Create Question Wizard**

To create a new question, access the Create Question Wizard in one the following ways:

- At the end of the Survey Creation Wizard by selecting the **Create question now** check box
- By selecting a survey under Survey Definition, and clicking Add Question
- Right-click on a survey and select Add Question on the shortcut menu

롲 Add Question

on the toolbar

# Create a question

To create a question, start the Create Question Wizard in one of the ways described in the previous topic.

d Create Question Wizard -		
°00	Welcome to the new question creation wizard. This wizard will guide you through the process of creating one or more survey questions.	
영GENESYS <sup>-</sup>	Press Next to continue.	
	< Back Next > Cancel	

## Create a question from a template

To add a question to your survey from a question template:

- 1. On the Create Question Wizard Welcome page, click Next.
- 2. On the Library selection page, select Create question from library, and from the list, select a question template.

The question is displayed in the **Question Text** box.

g Create Question Wizard	-		×
Library selection			
Choose from an available question template if desired.			
O Create new question			
Create question from library			
Customer Satisfaction 1		^	
Customer Satisfaction 2			
Customer Satisfaction 3			
Driver - CSR Communication Skills - Instructions			
Driver - CSR Communication Skills 1		~	
Question Text:			
How satisfied are you with your Customer Service experience? Rate scale from 1 to 9, with 1 being Very Dissatisfied and 9 being Very S		wer on a	
< Back Cre	ate	Cance	el

3. Click Create. Your question is created and added to your survey.

8	Create Question Wizard
ဂိ	Successfully created question. The question has been created. Create another question
<mark>ଟ</mark> ୍ଟ GENESYS <sup>™</sup>	
	< Back Finish Cancel

4. To create another question from a template, select **Create another question** check box. If you are finished, click **Finish**.

Questions are added under Survey Definition below the survey, and they are indicated by a question icon  $\frac{2}{3}$ .

# Create a new custom question

To create a new custom question for your survey:

1. On the Create Question Wizard Welcome page, click Next.

<b>1</b>	Create Question Wizard
°00	Welcome to the new question creation wizard. This wizard will guide you through the process of creating one or more survey questions.
<mark>영</mark> GENESYS <sup>-</sup>	Press Next to continue.
	< Back Next > Cancel

2. On the Library selection page, select Create new question, and click Next.

g Create Question Wizard			Х
	_		^
Library selection			
Choose from an available question template if desired.			
Create new question			
O Create question from library			
Customer Satisfaction 1		^	
Customer Satisfaction 2			
Customer Satisfaction 3			
Driver - CSR Communication Skills - Instructions			
Driver - CSR Communication Skills 1		~	
Question Text:			
< Back Crea	te	Cance	1

3. On the **Question Settings** page, configure the **Question type** and **Question settings**.

형	Create Question Wizard 📃 🗖 🗙
Question Se	ttings
Select the typ	e of question, name, and description.
Question Type	True/False v
Question Setting	js
Name	required
Description	
Question Prompt	None v required
No input prompt	<default></default>
No match prompt	<default></default>
Question weight	1.00 Ignore score for question
	< Back Next > Cancel

#### **Question Type**

Select the type of question: True/False, Multiple Choice, Numeric Range, or Free-form (recording).

#### **Question Settings**

#### Name

Type the name of the question.

#### Description

Type a description for the question.

#### **Question Prompt**

From the drop-down list, select the question prompt for your new question, or create a new prompt by selecting [add recording].

You can preview available prompts by clicking the play button

Use the Prompt Edit dialog to add prompts to surveys and questions. When you select [add recording].

8	Create Question Wiz	ard	d 🗕 🗖 🗙
Question Se	ttings		
Select the typ	e of question, name, and descripti	on.	
Question Type	True/False 🗸		
Question Setting	IS		
Name			* required
Description			
Question Prompt	None	v	required
No input prompt	<default></default>	¥	
No match prompt	<default> [add recording]</default>	^	
Question weight	Customer Satisfaction 1 Customer Satisfaction 2		on
	Customer Satisfaction 3 Driver - CSR Communication Skills - Instru Driver - CSR Communication Skills 1 Driver - CSR Communication Skills 2 Driver - CSR Demeanor - Instructions Driver - CSR Demeanor 1	L	Next > Cancel

The Prompt Edit dialog is displayed.

Prompt A		ompt Edit	
0	Telephone Handset V S	tation:	✓ Record
• Wa	r file selection		
File		Browse	
Listen to	Prompt		
Play To	PC Speakers V		Play
Prompt In	omation		
Name:		* required	
Enter text	to-speech that will play if promp	t is unavailable	

#### Prompt Audio

To record an audio prompt from your telephone, select **Station handset record**, and click **Record**. To use an existing audio file for your prompt, select **WAV file selection**, and click **Browse** to select the file path.

#### Listen to Prompt

To listen to the prompt, in the Play To box, select the output device, and click Play.

#### Prompt Information

Type the name for this prompt in the **Name** box. Type the full text of this prompt in the **Enter text-to-speech that will play** box.

When you have completed the **Prompt Edit** dialog, click **Save**.

#### No Input Prompt

From the drop-down list, select the prompt that the customer will hear if there is no response to the question, or create a new prompt by selecting [add recording]. If you select <Default> a system prompt will play.

8	Create Question Wizard 📃 🗖 🗙
Question Se	ttings
Select the typ	e of question, name, and description.
Question Type	True/False V
Question Setting	IS
Name	* required
Description	
Question Prompt	None v required
No input prompt	[add recording]
No match prompt	<default>  A  B</default>
Question weight	Customer Satisfaction 1 Customer Satisfaction 2
	Customer Satisfaction 3 Driver - CSR Communication Skills - Instru Driver - CSR Communication Skills 1 Driver - CSR Communication Skills 2 Driver - CSR Demeanor - Instructions Driver - CSR Demeanor 1 Driver - CSR Demeanor 2

You can preview available prompts by clicking the play button **—**. *Or* you can create your own No Input prompt by selecting **[add recording]**.

#### No Match Prompt

From the drop-down list, select the prompt that the customer will hear if the response is invalid, or create a new prompt by selecting [add recording]. If you select <Default> a system prompt will play.



You can preview available prompts by clicking the play button 🥌

Or you can create your own No Match prompt by selecting [add recording].

#### **Question Weight**

Select the number for which you want to weight the importance of this question. The Question weight is used as a multiplier to calculate the final score for a question. For example, if the question is scored as a 9 with a weight of 2, the final score for that question is 18.

The **Question Weight** must be a non-zero value. It can be expressed as a decimal, for example 0.33, 1.5, or 5.55. To not have the score for a question considered in the final score, use the **Ignore score for question** check box.

#### Ignore score for question

Select this box to not have the score for this question considered in the calculations for the final score of the survey.

1	Create Question Wizard -
Question Se	ettings
Select the typ	be of question, name, and description.
Question Type	True/False v
Question Settin	gs
Name	beiuper*
Description	
Question Prompt	None v required
No input prompt	<default></default>
No match prompt	<default></default>
Question weight	1.00 Ignore score for question
	< Back Next > Cancel

#### 4. Click Next.

The **Question Scoring** page is displayed.

8	Create Question Wizard	_ <b>D</b> X
Question Sc	oring	
Enter the value	es to use for scoring.	
True / False		

The values to set for scoring vary depending on the type of question you selected: True/False, Multiple Choice, Numeric Range, or Free-form (recording).

5. When you have completed entering the scoring values, click **Next**. The **Select categories for the question** page is displayed.

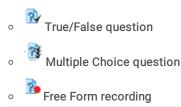
d Create C	uestion Wizard 📃 🗖 🗙
Select categories for the	question
Select available categories and pr	ess next.
Question Categories User Defined Categories	Selected Categories
	< Back Create Cancel

- 6. Under **Question Categories**, in the **User Defined Categories** box, select the categories in which you want this question to be included. Click the arrow to add the categories to the **Selected Categories** box.
- 7. When you have finished, click Create. Your question is created and added to your survey.

8	Create Question Wizard
°00	Successfully created question. The question has been created. Create another question
<mark>영</mark> GENESYS <sup>-</sup>	
	< Back Finish Cancel

- 8. To create another question, select the Create another question check box.
- 9. Click Finish.
  - Questions are added under Survey Definition below the survey, and the question type is indicated by an icon-for example:

0	Numeric Range question
	Humeno Hunge queotion



#### Note:

When the customer is given the survey, the configured prompts are presented. You can localize the Free-form recording confirmation prompts by configuring the value of **the CSSurvey**: **Clear Language For Survey** server parameter. The server parameter default value of **Yes** clears the language attribute of the call. If you do not want to clear the language attribute of the call when a survey begins, set the server parameter value to **No**. This allows the language attribute of the call to be used to localize the Free-form confirmation prompts.

## Ordering questions in a survey

You can change the order questions appear in a survey. Here's how:

- 1. From the Interaction Feedback Navigation Pane, select a Question in a Survey.
- 2. Right-click on a Question and on the shortcut menu click Up or Down.

The position of the question is reordered in the survey.

## **Editing questions**

To edit a question, in the **Survey Definition** pane, under the survey, select the question. The question properties are displayed in the **Question View** in the workspace. You can update all of the question properties you configured when creating the question and configure additional properties, such as **Retries** and **Timeout**. You can also add branching logic, to configure when and how questions are presented based on customer responses to a question.

## **Retries and Timeout**

Retries and Timeout values are configured on the question properties displayed in the workspace.

The **Retries** value is the total number of times a question is repeated if there is an invalid response. If there is no response after the number of retries, Interaction Feedback goes on to the next question. However, if there is no answer or no match for the *first* question, Interaction Feedback abandons the survey, allowing for hang ups. After the first question is answered, the remaining questions will go on to the next question if there is no answer or no match.

The **Timeout** value is the time, in seconds, to wait for a response after the prompt is completed. When the timeout expires, the No Input prompt is played.

To change the default values, display the question properties in the workspace, and update the values. When you have finished, right-click and in the shortcut menu, select **Save question**.

When your updates are complete, right-click and on the shortcut menu, select Save question.

## Add branching logic to a survey

Adding branching logic to a survey allows the survey to change according to user responses to specific questions. In a survey with branches, relevant questions are offered according to the user's specific situation. With branching, questions can be skipped or another question can be asked based on the user response to a branching question.

After your survey has been created and you have added all your questions to the survey, you can add branching to specific survey questions. Branching is configured in the Interaction Feedback Question View. Branching options can be configured for the following question types: True/False, Multiple Choice, and Numeric Range. Free Form (recording) questions cannot be configured as a branching question.

Each question type has its own set of branching options. For example, here are the branching options offered for a True or False Question:

True False Question						
Question Setting	]5					
Name	True False Question					
Description						
Question Prompt	Customer Satisfaction 1					
No input prompt	<default></default>					
No match prompt	<default></default>					
Question weight	1.00 📑 🗌 Ignore score for question					
Retries	3					
Timeout	8 Seconds					
Question Categories						
User Defined Categor						
User Defined Categor	ies Selected Categories					
User Defined Categor	ies Selected Categories					
User Defined Categor	Branch To					
User Defined Categor	ies Selected Categories					
User Defined Categor	Branch To					
User Defined Categor	ies Selected Categories					
User Defined Categor	ies Selected Categories					
User Defined Categor	ies Selected Categories					

For step-by-step instructions on configuring each question type for branching logic in your survey, see <u>Appendix B. Add branching</u> <u>logic to a survey</u>.

## **Create templates**

Templates are created from existing surveys and questions. Templates save the settings for surveys and questions, saving you time when creating new surveys. Templates are saved in the Library for reuse.

## **Create question templates**

To create a question template from a question:

1. In the Survey Definition pane, select the question.

Copy To Question Libra
------------------------

2. Click Copy to Question Library

on the toolbar.

The new question template is added to the Library and is indicated with a question template icon

## **Delete Custom Questions from the Library**

You can remove custom questions that have been copied to the Question Library. To delete a question, the User must have the Access Rights to Modify All surveys.

To remove a custom question from the Library:

- 1. In the Library pane, select the question to be deleted.
- Right-click and on the shortcut menu, click Delete item.
   You can only delete questions you have added to the Library.

## Create survey templates

To create a survey template from a survey:

- 1. In the Survey Definition pane, select the survey.
- 2. Click Copy to Survey Library

Copy To Survey Library on the toolbar.

The survey template is added to the Library and is indicated with a survey template icon  $\widehat{\mathbf{2}}$ .

# **View Survey Results**

Use Interaction Feedback to view completed survey results. You can use the Interaction Feedback Client Dashboard to view a summary of a completed survey, and you can create searches to display details for completed surveys.

Note:

You can view surveys in real-time using Interaction Feedback Monitor in Interaction Supervisor. For more information on real-time viewing, see Monitor surveys in real-time.

## **Completed survey results**

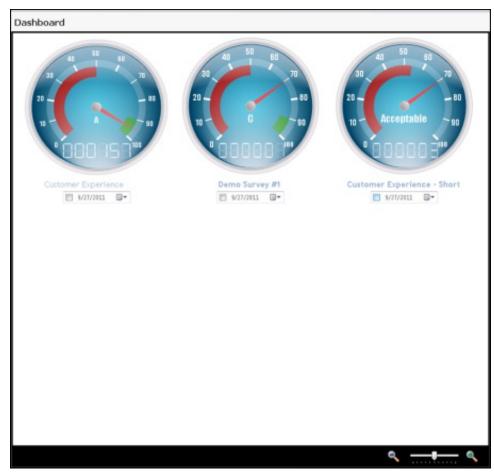
There are two ways to view completed surveys using the Interaction Feedback Client: the Dashboard and searches. Use the Navigation Pane to display these views in the workspace.

View completed Survey Results using the Interaction Feedback Navigation Pane.



## The Dashboard

Use Interaction Feedback's Dashboard to view a summary of individual survey results. To access the Dashboard, under **Survey Results** select **Dashboard**. <u>The Dashboard view</u> is displayed in the workspace.



## Manage the Dashboard

Use the Manage Dashboard toolbar button to add individual survey results to the Dashboard. Results are graphically displayed as a speedometer.

The graphical interface shows the average score for surveys completed since the selected Starting Date. The speedometer also displays the rank and the number of completed surveys.

## **Dashboard view**

#### Speedometer pointer

The average percentage for the surveys taken is indicated by the pointer, between 0% and 100%.

#### Ranking

The average ranking of a survey is displayed on the face of the speedometer. The text that is displayed depends on the Rank label assigned when creating the Rank Group.

#### Odometer

The number of completed surveys is displayed by the odometer.

#### Survey name

The survey name is displayed below the speedometer.

#### Starting Date

Select this check box to display data for a range of dates beginning with a specific date to the current day.

#### Date field

Enter a specific date for which to display completed survey results. If the Starting Date check box is selected, the average completed survey results, beginning with this date to the current day, are displayed.

## Update the Dashboard

The Dashboard data is updated every three minutes, or when refreshed. To refresh the data, right-click on the Dashboard, and on the shortcut menu click Refresh.

## Access the Dashboard

To access the Dashboard, under Survey Results select Dashboard. The Dashboard view is displayed in the workspace.

1. To display survey results, click **Manage Dashboard** on the toolbar The **Manage Dashboard** dialog is displayed.

1anageDashbaord				×
Survey	Chuck Survey	•		
Starting Date	9/13/2008	•	Add	
Survey		Starting Date		🔂 Up
				Down
				Remove
				Ticiliove
				Close

- 2. Select the survey to be displayed from the Survey drop-down list.
- To display survey results for a range of dates beginning with a specific date to the current day, select the Starting Date check box. Next, in the date field drop-down, select a starting date on the calendar that is displayed.
   Or, to display survey results for a *specific* date, clear the Starting Date check box, and in the drop-down calendar select the date for which you want the data to be displayed.
- 4. Click Add.

The survey is added to the **Survey** list, and the survey is displayed on the Dashboard.

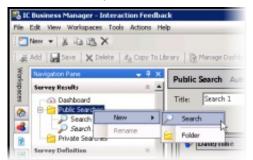
5. Continue to define as many surveys as you want to display on the Dashboard. When you have completed defining surveys, click **Close**.

## Searches

You can create **Public Searches** and **Private Searches** to display completed survey results, in table form. After creating a search, use **Run a Search** to view the survey results in the workspace.

## Create a Search

- 1. Select either the Public Searches folder or the Private Searches folder and right-click the selection.
- 2. On the submenu, point to **New**, and then click **Search**.

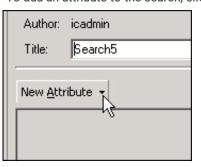


🕞 Manage Dashboard

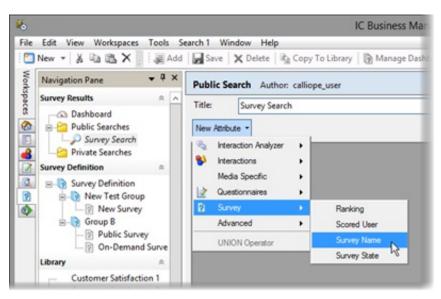
3. The search properties are displayed in the workspace.

Autor	icadhin	
Tile	PenareTeach	Hermoly: 101
Nev.81	dade =	0 4 X
	Orch. to with an attribute inits the search.	

The default search name is displayed in the **Title** box. To rename the search, type a new name. 4. To add an attribute to the search, click the **New Attribute** arrow.



5. Point to Survey, and click the attribute you want to add to your search.



The attribute is added to the workspace.

Jaho Tile	c kabin Seach?	Max recaltz 100
Mare &	tribute +	×
8	Sarway Second Uses Equal to T druck T	<u> 7</u>

- 6. Select each attribute's search criteria and comparison operator.
  - Use this button to add additional search criteria to an attribute.
  - Use this button to delete a search criterion from an attribute.

Marketing Leads	Max results: 20000
ttribute +	<b>₽</b> ⊕ <b>X</b>
Assigned Workgroup	
Equal to Marketing	×
Survey Name	
Equal to Contact Center2 (3)	•
Media Type IF Call I Chat I Email I Fax	
🛃 Save Search	

You can also create Public and Private Searches using the Menu Bar and the Toolbar. Using the Menu Bar, from the File menu, point to New and click Search. On the Select Search Location dialog, select Private Searches or Public Searches. To create a new Interaction Feedback search using the Toolbar, click New, and on the Create New View dialog, click OK. On the Select Search Location dialog, select Private Searches.

## **Search Attributes**

There are four search attributes specific to the Survey menu:

#### Ranking

The **Survey Ranking** attribute searches the selected **Rank Group** for surveys that match the selected rank using the comparison operator.

#### Scored User

The Survey Scored User attribute searches surveys for the selected agent using the comparison operator.

#### Survey Name

The Survey Name attribute searches surveys for the selected survey name using the comparison operator.

#### Survey State

The Survey State attribute searches surveys for the selected survey state using the comparison operator.

## Search order

Surveys are searched using the attributes in the way they are ordered from top to bottom.

Use the green arrows to change the order of the search attributes

Use the delete button to delete a selected attribute.

## Run a search

Run Search

on the toolbar. The search results are

To run a search, under Survey Results, select the search, and click **Run Search** displayed in the workspace, in a grid.

Loren - 10 -m mP s	K i ali Ad	d 🖌 Save 🗙 Deleta 🗟 Ca	py To Library	y 📳 Manage Dashb	bard	Configure Search	Save Sear	ch X D	elete Search				
	* <sup>3</sup> ×	Marketing surveys (	11 resul	ts found)									
Survey Results * Dashboard	- [	🖉 Survey Name	Agent	Caller		Score Rank	Cor	npleted	Date	∇ State	Interaction Id	Recording Id	1
		22 0.1	101 I	00		- 61	82		-	80	100	W1	1
-Categories		Customer Experience - Short	Clarkin, Gi	na 🦳 Gina Clarkin	)	51 Near P	effect Tru		3/7/2011 3:02	Complete	20019201672011	52514112-9810-	
User - Gina (		Customer Experience - Short	Clarkin, Gi	na Gina Clarkir	,	20 Failure	Tru		\$/6/2011.2:50	Complete	20019201492011	94024112-EAC8-	Т
Private Searche		Customer Experience - Short	Clarkin, Gi	na Gina Clarkir	1	48 A	Tru		\$/6/2011 2:31	Complete	20019201472011		
Survey Definition		Marketing	Clarkin, Gi	na Gina Clarkir	1	0 Failure	Fals		\$/6/2011 1:18	Caller Disconn	20019201452011		1
B- Survey Definition		Marketing	Clarkin, Gi	na Gina Clarkir	1	0 Failure	Fals	e	\$/6/2011 1:16	Abandoned	20019201422011		
Demo Surv		Marketing	Clarkin, Gi	na Gina Clarkir	1	36 Best	Tru	t	9/6/2011 1:12	Complete	20019201402011		T
E Test Survey	nerExperix	Customer Experience - ACSI	Clarkin, Gi	na Gina Clarkir	1	67 B	Tru	e .	9/1/2011 5:09	Complete	20015201052011	C8803F12-8F94-D	
	er Experie	Customer Experience - ACSI	Clarkin, Gi	na Gina Clarkir	1	71 8	Tru	e .	9/1/2011 457	Complete	20015201062011	14803F12-DC0E-	T
- Marketi	ing	Customer Experience - ACSI	Clarkin, Gi	na Gina Clarkir	)	74 B	Tru	e	9/1/2011 4:31	Complete	20015201032011	827E3F12-A5A4-	
Library	*	Demo Survey #1	Clarkin, Gi	na Gina Clarkin	1	8 F	Fals	e	9/1/2011 4:27	Abandoned	20019201012011		۰.
		4									1		•
		0%. M	in Score: 6 1	Max Score: 54 Score: 1		10%(lear Perfect)							
		Name		Answer	Score	Question Type	Min Score	Max Sco	ve Weight	Description			
		Driver - CSR Demeanor 1 (2)		9	9	Numeric Range	1	9	1	Please rate the Cus	Aomer Service Repre	sentative's willingne	155 Ba
		Driver - CSR Communication	Skills 1 (1)	7	7	Numeric Range	1	9	1	Please rate the Cus	Aomer ServiceRrepri	esentative's ability to	cor
		Customer Satisfaction 1 (3)		9	9	Numeric Range	1	9	1	How satisfied are y	you with your Custo	mer Service experien	ce?
		Customer Satisfaction 2 (3)	-	9	9	Numeric Range	1	9	1	To what extent has	s your Customer Ser	vice experience faller	n sł
		Customer Satisfaction 3 (3)		8	1	Numeric Range	1	9	1	How well do you t	hink your Customer	Service experience of	com
		Outcome - Try New Products	(1)	9	9	Numeric Range	1	9	1	How likely are you	to try other produc	ts from our company	54
		Tell Us - Comments		Listen to comments	8	Freeform Recording	1 0	0	0				-

#### Note:

To paste Survey Results information into another application, use Ctrl+C in the Search Results grid to Copy an entire row, or multiple rows, to the clipboard.

### Selecting Fields for the grid

To change the fields that are displayed in the grid, click the **Field Chooser** dialog select the fields to display in the grid.



on the upper left of the grid. In the Field Chooser

ield	Chooser 🛛 🛛
◄	Agent
✓	Caller
4	Completed
◄	Date
◄	Duration in seconds
◄	Interaction ID
◄	Origin
◄	Rank
◄	Recording ID
✓	Score
◄	State
◄	Survey Name
7	Туре

The available fields for the search results grid are described in the following table.

	Field Chooser					
Field	Description					
Agent	Name of the agent whose call is associated with this survey					
Caller	Name of the caller who opted-in to take the survey					
Completed	Indicates a True or False value, True indicating all required survey questions were completed, and False indicating all required survey questions were not completed					
Date	The Date and Time the survey occurred					
Duration in seconds	The total time, in seconds, for the caller to take the survey					
Interaction ID	The Interaction ID of the call associated with the survey					
Origin	How the call came in to the system—possible values: Post-Call (used for opt-in surveys), External, Internal, Transfer, or Outbound					
Rank	The Rank, or grade, based on the score associated with the survey rank group					
Recording ID	The Recording ID of the call associated with the survey					
	The Recording ID is displayed as a dynamic link. To listen to the recording, click the link to launch the Interaction Recorder playback dialog.					
Score	Total survey score					
State	<ul> <li>Current state of the survey, which include:</li> <li>Abandoned – The caller hung up during the survey and the survey was abandoned</li> <li>Complete – The survey was completed</li> <li>Insufficient Resources – Licensing or some other resource was not available to present the survey</li> <li>Opt-Out – The caller opted out of the survey</li> <li>Error – There was an internal error when attempting to present the survey</li> <li>Not Answered – The caller disconnected before the survey began</li> </ul>					
Survey Name	Name of the survey					
Туре	The type of survey, either Post-Call or On Demand					

# Tools

Interaction Feedback has a suite of tools to manage Interaction Feedback's Prompts, Question Categories, and Rankings. To access these tools, click the **Tools** menu.

# Manage Prompts

Prompts are pre-recorded audio files that:

- Invite the customer to participate in a survey
- Welcome the customer to the survey
- Ask the customer specific customer satisfaction questions
- Thank the customer for taking the survey

You can select prompts from existing Interaction Feedback prompts or create your own prompts.

## Types of prompts

These are the types of prompts that you will be selecting on Interaction Feedback dialogs when creating surveys and questions.

#### Invitation

This prompt invites the customer, before interacting with an agent, to participate in a survey at the end of a call.

#### Opt-in

This prompt recognizes that the customer has chosen to take the survey, and requests that the customer stay on the line after the call has concluded.

#### Opt-out

This prompt is played when the user has chosen not to take the survey.

#### Welcome

This prompts welcomes the customer to the survey at the end of the agent interaction and provides instructions on how to take the survey, such as how to repeat a question or how to skip a question.

#### Questions

These prompts contain the specific questions that *measure* customers' perceptions on satisfaction with the overall experience of the call, customer feedback on the agent's skills and knowledge, and the likelihood that the customer might buy or recommend your company's products.

#### **No Input Prompt**

This is the prompt that is played if there was no response to the question.

#### No Match Prompt

This is the prompt that is played if the customer's response is invalid.

#### Finish

This prompt is played at the completion of the survey and thanks the customer for taking the survey.

## Feedback Prompt Management

Use the Feedback Prompt Management tool to:

- Create new prompts
- Edit existing prompts
- Delete prompts
- Import WAV files for new prompts

To access the Feedback Prompt Management dialog, from the Tools menu, click Manage Prompts.

lame	File	Description 🔺	
Dutcome - Try New	Outcome - Try New Products	How likely are you to try other.	
Outcome · Recom	Outcome - Recommend.wav	If asked, how likely are you to.	
Outcome - Primary	Outcome - Primary Supplier.w	How likely are you to make u.	
Outcome - Buy Again	Outcome - Buy Again way	How likely are you to purchas.	
Generic_Welcome	Generic_Welcome.wav		
Generic_recordcom	Generic_recordcomments.wav		
Generic_opt-OUT	Generic_opt-OUT_confirmati		
Generic_opt-in_con	Generic_opt-in_confirmation		
Generic_Invitation	Generic_Invitation.wav		
Generic_finish.wav	Generic_finish.wav		Add
Driver - Timeliness 2	Driver - Timeliness 2.wav	Please rate the amount of tim.	
Driver - Timeliness 1	Driver - Timeliness 1.wav	Please rate amount of time yo.	Edik
Driver - Timeliness	Driver - Timeliness - Instructio	Think now about the time spe.	
Driver - Quality of In	Driver - Quality of Information	Please rate degree to which i	Delete
Driver - Quality of In	Driver - Quality of Information	Please rate the degree to whi.	
Driver - Quality of In	Driver - Quality of Information	Think now about the quality o.	Import
Driver - Problem Re	Driver - Problem Resolution 2	Was your inquiry addressed o.	
Driver - Problem Re	Driver - Problem Resolution 1	Is this the first time you have	
Driver - Problem Re	Driver - Problem Resolution	Think now about how well w	
Driver - IVR 2	Driver - IVR 2.wav	Please rate the ability to get t.	
Driver - IVR 1	Driver - IVR 1.wav	Please rate the ease of navig.	
Driver - IVR - Instru	Driver - IVR - Instructions.wav	Think now about your experie.	
1	Deiner lanear 3		

Available prompts are listed by Name, File and Description. To sort the list of prompts, click a column heading.

### Create new prompts

To create a new prompt, click Add. The Prompt Edit dialog is displayed.

Prompt Edit	x
Prompt Audio O Station handset record Telephone Handset V Station:	Record
Wav file selection     File:     Browse	
Listen to Prompt Play To: PC Speakers	Play
Prompt Information Name: *required	
Enter text-to-speech that will play if prompt is unavailable	
Save	
Save Cancel	

#### **Prompt Audio**

To record an audio prompt from your telephone, select Station handset record, and click Record.

To use an existing audio file for your prompt, select WAV file selection, and click Browse to select the file path.

#### Listen to Prompt

To listen to the prompt, in the **Play To** box, select the output device, and click **Play**.

#### Prompt Information

Type the name for this prompt in the **Name** box. Type the full text of this prompt in the **Description or text to speech if no prompt has been added** box. This is also the text that appears in the **Description** column.

When you have completed the Prompt Edit dialog, click Save to add your new prompt to the list of prompts.

## Edit prompts

On the Feedback Prompt Management dialog, select the prompt, and click Edit. The Prompt Edit dialog is displayed with the current prompt settings.

Prompt Edit 🛛 🛛 🕅
Prompt Audio   Station handset record  Telephone Handset  Station:  CSS1  Record  Record  File C:\DDCUME~1\icadmin\L0CALS~1\ Browse
Listen to prompt Play To: PC Speakers Play
Prompt Information Name Outcome - Try New Products Enter text-to-speech that will play if prompt is unavailable
How likely are you to try other products from our company? Please rate your answer on a scale from 1 to 9 with 1 being Not Very Likely and 9 being Very Likely. If you're not sure, press 5.
Save Cancel

After updating the prompt properties, click Save.

## Delete a prompt

Use the Feedback Prompt Management dialog to delete an existing prompt. From the Tools menu, click Manage Prompts.

To delete an existing prompt, select the prompt in the **Feedback Prompt Management** dialog, and click **Delete**.

Name	File	Description	*	
Jutcome - Try New	Outcome - Try New Products	How likely are you to try other.		
Jutcome - Recom	Outcome - Recommend.wav	If asked, how likely are you to.		
Jutcome - Primary	Outcome - Primary Supplier.w	How likely are you to make u		
Jutcome - Buy Again	Outcome - Buy Again wav	How likely are you to purchas.		
Seneric_Welcome	Generic_Welcome.wav			
Seneric_recordcom	Generic_recordcomments.wav			
ieneric_opt-OUT	Generic_opt-OUT_confirmati			
seneric_opt-in_con	Generic_opt-in_confirmation			
ieneric_Invitation	Generic_Invitation.wav			
ieneric_finish.wav	Genetic_finish.wav			Add
Driver - Timeliness 2	Driver - Timeliness 2.wav	Please rate the amount of tim.		
Driver - Timeliness 1	Driver - Timeliness 1.wav	Please rate amount of time yo.		Edit
Driver - Timeliness	Driver - Timeliness - Instructio	Think now about the time spe-	_	
Driver - Quality of In	Driver - Quality of Information	Please rate degree to which i		Delete
river - Quality of In	Driver - Quality of Information	Please rate the degree to whi.		
Driver - Quality of In	Driver - Quality of Information	Think now about the quality o.		Import
river - Problem Re	Driver - Problem Resolution 2	Was your inquiry addressed o.		Turbour
) river - Problem Re	Driver - Problem Resolution 1	Is this the first time you have		
) river - Problem Re	Driver - Problem Resolution	Think now about how well w		
Driver - IVR 2	Driver - IVR 2.wav	Please rate the ability to get t.		
Driver - IVR 1	Driver - IVR 1.wav	Please rate the ease of navig.		
Driver - IVR - Instru	Driver - IVR - Instructions.wav	Think now about your experie.	-1	
View Income O	Datase Israe Const.	Please sate the desire to obtain	<u> </u>	

## Create a prompt from a WAV file

Use the Feedback Prompt Management dialog to create a prompt from an existing WAV file.

Name	File	Description 🔺	
Dutcome - Try New	Outcome - Try New Products	How likely are you to try other.	
Jutcome - Recom	Outcome - Recommend.wav	If asked, how likely are you to.	
Jutcome - Primary	Outcome - Primary Supplier.w	How likely are you to make u.	
Jutcome - Buy Again	Outcome - Buy Again wav	How likely are you to purchas.	
seneric_Welcome	Generic_Welcome.wav		
Seneric_recordcom	Generic_recordcomments.wav		
Seneric_opt-OUT	Generic_opt-OUT_confirmati		
Seneric_opt-in_con	Generic_opt-in_confirmation		
Seneric_Invitation	Generic_Invitation.wav		
Seneric_finish.wav	Generic_finish.wav		Add
) river - Timeliness 2	Driver - Timeliness 2.wav	Please rate the amount of tim.	
) river - Timeliness 1	Driver - Timeliness 1.wav	Please rate amount of time yo.	Edit
Driver - Timeliness	Driver - Timeliness - Instructio	Think now about the time spe.	
Driver - Quality of In	Driver - Quality of Information	Please rate degree to which i.	Delete
Driver - Quality of In	Driver - Quality of Information	Please rate the degree to whi.	
Driver - Quality of In	Driver - Quality of Information	Think now about the quality o.	Import
Driver - Problem Re	Driver - Problem Resolution 2	Was your inquiry addressed o.	
) river - Problem Re	Driver - Problem Resolution 1	Is this the first time you have	
) river - Problem Re	Driver - Problem Resolution	Think now about how well w	
Driver - IVR 2	Driver - IVR 2.wav	Please rate the ability to get t.	
Driver - IVR 1	Driver - IVR 1.wav	Please rate the ease of navig.	
Driver - IVR - Instru	Driver - IVR - Instructions.wav	Think now about your experie.	
Spiner Income St.	Dubling Jackan Dubling	Plana and all a damage in the	

To create a prompt, click **Import**. The **Select one or more prompt WAV files to import** dialog is displayed. Locate and select the file name, and click **Open**.

A prompt is created using the WAV file name as the name of the prompt. To edit the prompt, select it and click Edit.

## **Manage Question Categories**

Question Categories are created to organize questions in to logical groups.

## **Question Categories**

Use the **Question Categories** dialog to create and delete these categories. To access the Question Categories dialog, from the **Tools** menu, click **Manage Question Categories**. The **Question Categories** dialog is displayed.

### Adding categories

To create a new category, click Add. A New Category is created and selected. Type a Category Name and press Enter.

### **Deleting categories**

To delete an existing category, select it and click **Delete**.

## Manage Rankings

Rankings are scaled scores used to rate or grade customer surveys. When a survey is completed, the final score is compared to the value defined in the survey's ranking. When viewing survey results, the rank is displayed in searches and the Dashboard.

## Define a Rank Group

Define ranking scales on the **Questionnaires Rank Groups** dialog. Assign a Rank Group to a survey on the survey configuration page.

To access Rank Groups, from the Tools menu click Manage Rankings. The Questionnaires Rank Groups dialog is displayed.

🛃 Questionnaires Rank Gro	ups			_ 🗆 🗙
💬 New Group 🗙 Delete Grou	p 🍣 Refre	sh		
Rank Groups	Group Na Ranks	nne: Tens System		
		Bank	Top Percent	Add
	13- L	A	90	
		В	80	Remove
		С	70	
	1.1	D	60	
		F	50	
			Save	Close

To define a new ranking scale, first create a new group.

- 1. On the toolbar click New Group. The New Rank Group is displayed under Rank Groups at the end of the list.
- 2. In the RankGroups list, right-click New Rank Group and click Rename to name the new Rank Group.
- 3. Type the new name for this rank group, and press Enter. The new name is displayed in the Group Name box in the Rank Groups view.

## Define the ranking scale

To define the ranking scale for a Rank Group, select the Rank group, and edit its properties in the right pane.

- 1. To add a Rank, click Add.
- 2. New Rank is added to the Rank list and is selected. Type a name for the ranking.
- Use the Ranks percentage slider to select a percentage for the Top Percent column. Define as many ranks as you choose to use in your ranking scale. Assign a top percent for each Rank in the Top Percent column, setting the highest percentage for the Rank in this column.

For example, if A = 90-100 percent, the highest percentage, 100, is set in the **Top Percent** column. Therefore, if B = 80-89 percent, 89 is set in the **Top Percent** column for B. Next, C = 70-79 percent, and 79 is set in the **Top Percent** column for C. Rank D = 60-69 percent, and 69 is set in the **Top Percent** column for D. And the F Rank includes 0-59 percent when 59 is set as the **Top Percent** column for the Rank. The lowest Rank includes all scores below 59, including zero.

4. Click Save, and then click Close to exit the Questionnaires Rank Group dialog.

## Assign a Ranking to a survey

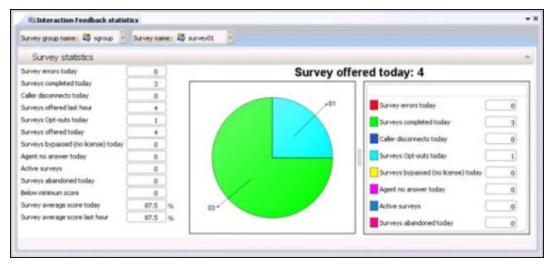
To assign a ranking to a survey, view the survey in the workspace.

Customer Service	
Name Customer Service	
Description	* This survey is ACSI compliant.
	ACSI questions provided by CEI Group
Rank Group Tens System	
Record calls that use this survey	
Minimum Acceptable Score 70	
Rule Prompts	
Rule Conditions	
calls routed to these workgroups: <workgroups></workgroups>	
from the following callers (ANI): <phone numbers=""></phone>	
calls to these numbers (DNIS): (phone numbers)	
every <nth> call</nth>	

In the Rank Group drop-down list, select a rank group to apply to the survey.

# Monitor surveys in real-time

Use Interaction Feedback Statistics View in IC Business Manager to monitor surveys in real-time. Interaction Feedback Statistics provides the ability to view real-time statistics for surveys *in progress* as well as completed surveys and surveys where participants have opted out or abandoned.



Interaction Feedback real-time monitoring also allows business users to create Alerts for surveys that are in progress.

For complete information on Interaction Feedback Statistics View, see Interaction Supervisor Help in IC Business Manager.

- To view surveys in real-time:
- 1. In IC Business Manager, click the Default Workspace module tab.

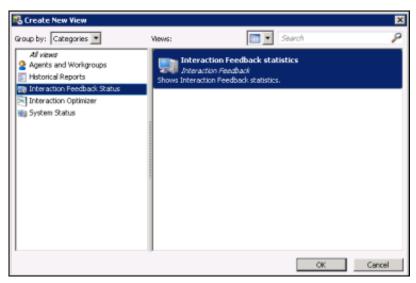


2. On the IC Business Manager toolbar, click New.



3. On the Create New View dialog, in the Group by box select Categories, and in the left pane select Interaction Feedback Status.

Interaction Feedback statistics is displayed in the right pane.

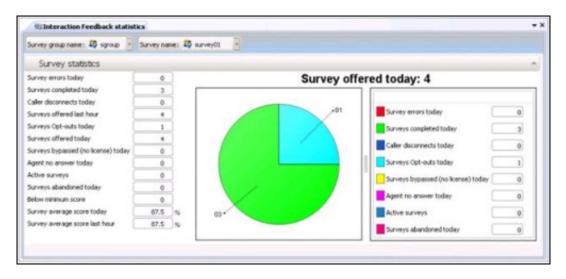


#### 4. Click OK.

The Interaction Feedback Wizard starts with the Survey Group page displayed.

🖏 Interaction Feedback	Wizard - :	Survey (	Group Wia	ard	×
Filter					
👯 Group A					
🥵 Group B					
Group for Marketing St	rveys				
<u> </u>					
Survey group name 🔀 Gr	oup A				
Survey name 🛛 🕵					
0	Next	•	Finish		Cancel

- 5. Select a Group in the list box. You can use the Filter box to find a Group listed in the box. Click Next.
- 6. On the Interaction Feedback Wizard **Survey Name** page, select a survey from the list and click **Finish**.
- 7. The Interaction Feedback statistics page is displayed in the Workspace.



The available Feedback Survey Statistics include:

- Survey errors today
- Surveys completed today
- Caller disconnects today
- Surveys offered last hour
- Surveys Opt-outs today
- Surveys Offered today
- Surveys bypassed (no license) today
- Agent no answer today
- Active surveys
- Surveys abandoned today
- Below minimum score
- Survey average score today
- Survey average score last hour

For detailed information on using the Interaction Feedback statistics page, press F1 for Help. The Interaction Feedback Statistics view Help is displayed.

# **Interaction Feedback Reports**

The results of the customer satisfaction survey data are collected, aggregated, and presented in Interaction Reporter in IC Business Manager. Reports include data from *completed* surveys. You can view, export, and print customer satisfaction survey reports. Reports are based on *completed* customer surveys.

#### Note:

If your survey contains a Free Form response as the last question, and the customer hangs up instead of pressing any key to complete the response, the survey state is marked Complete and the Complete Field for the report is marked as True. Comments that are ended by hanging up are displayed in the reports.

## Interaction Feedback Survey reports

The following Interaction Reporter reports are available for Interaction Feedback surveys:

#### Satisfaction Trends (Line Graph)

The Survey Satisfaction Trends report shows the satisfaction trend for an agent over time, by survey. The report is displayed in a line graph.

#### Survey Scoring Detail

The Survey Scoring Detail report shows the average survey score for agents during a date and time range. The report also shows survey detail by user, including survey scores, percentile, and score and weight by question.

#### Survey Scoring Summary

The Survey Scoring Summary report shows the average survey score for agents during a date and time range. It also includes a list showing Average Score and Percentile per User for the selected survey.

#### Survey vs. Quality Scores

This report compares survey and quality scores from Interaction Recorder for a specified agent.

# Appendix B. Add branching logic to a survey

Adding branching logic to a survey allows the survey to change according to user responses to specific questions. In a survey with branches, relevant questions are offered according to the user's specific situation. With branching, questions can be skipped or another question can be asked based on the user response to a branching question.

When creating a survey, determine the logic you want to use for the branching. For example, you might want to offer a question only if someone chooses a specific answer to a question, or based on a specific answer to a question, branch to a set of questions.

First, sketch out the questions for your survey and their logic. After you have created the survey and your survey questions, order your survey questions and specify where and how the survey questions branch. The order of the questions in a survey is important, as when you are assigning branching you can only branch forward to a question, you cannot loop back to a previous question.

Branching options are based on the type of question you have created. Branching options can be configured for the following question types: True/False, Multiple Choice, and Numeric Range. Free Form (recording) questions cannot be configured as a branching question.

# Add branching to a question

After your survey has been created and you have added all your questions to the survey, you can add branching to specific survey questions. Branching is configured in the Interaction Feedback Question View. Branching options can be configured for the following question types: True/False, Multiple Choice, and Numeric Range. Follow these steps to add branching to a question.

# Add branching to a True/False question

Based on the customer's response to a True/False question, branching options for an answer are: Any, Skip, True, or False. Here are the steps for configuring branching for a True/False question.

1. In the **Navigation** Pane, under the Survey, select the question you want to add branching to. The Question Settings are displayed in the workspace, including the **Branching** options.

True False Question				
Question Setting	gs			
Name	True False Question			
Description				
Question Prompt	Customer Satisfaction 1			
No input prompt	<default></default>			
No match prompt	<default></default>			
Question weight	1.00 📑 🗌 Ignore score for question			
Retries	3			
Timeout	8 Seconds			
Question Catego	ories			
User Defined Catego	ries Selected Categories			
	<u>+</u>			
	<b>\</b>			
Branching	<u>*</u>			
Answer	Branch To			
-	Branch To Øranch To			
Answer	<next question=""></next>			
Answer Any	<next question=""></next>			
Answer Any Skip	<next question=""></next>			
Answer Any Skip True	<next question="">  (Next Question&gt;  (Next Question&gt;</next>			
Answer Any Skip True False	<next question="">  (Next Question&gt;  (Next Question&gt;</next>			

 Under Branching, for each possible Answer to the question that you want to specify a branching option for, select the question that you want to Branch To from the drop-down list. The default is <Next Question>, and included with the list of questions is the option <End Survey>.

When you have completed adding branching to the question, click Save Question.
 The branching for this question is displayed in the Navigation Pane below the question.

- R True False Question

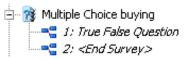
# Add branching to a Multiple Choice question

Based on the customer's response to a Multiple Choice question, branching options for an answer are: **Any**, **Skip**, and all **DTMF** Key responses are listed. Here are the steps for configuring branching for a Multiple Choice question.

1. In the Navigation Pane, under the Survey, select the question you want to add branching to. The Question Settings are displayed in the workspace, including the **Branching** options.

Multiple C	hoice	buying	
Question Set	tings		
Name	Multi;	ale Choice buying	
Description			
Question Prompt	Custo	omer Satisfaction 1	
No input prompt	<def< td=""><td>ault&gt; 💌 💌</td><td></td></def<>	ault> 💌 💌	
No match prompt	t <def< td=""><td>iault&gt; 💌 💌</td><td></td></def<>	iault> 💌 💌	
Question weight	1.00	Ignore score for question	
Retries	3		
Timeout	8	Seconds	
Question Cat	egories		
User Defined Cat	egories	Selected Categories	
		* *	
Branching			
C Any	<nex< td=""><td>kt Question&gt;</td><td></td></nex<>	kt Question>	
Skip	<nex< td=""><td>kt Question&gt;</td><td></td></nex<>	kt Question>	
1	<nex< td=""><td>kt Question&gt;</td><td></td></nex<>	kt Question>	
2	<nex< td=""><td>kt Question&gt;</td><td></td></nex<>	kt Question>	
•			
Multiple Choi	ce		1
DTMF Key	Value	Description	Add
1	1	Already have product	Edit
2	2	Will buy in the future	LORIN
			Remove

- Under Branching, for each possible answer to the question that you want to specify a branching option for, select the question that you want to branch to from the drop-down list. The default is <Next Question>, and included with the list of questions is the option <End Survey>.
- When you have completed adding branching to the question, click Save Question.
   The branching for this question is displayed in the Navigation Pane below the question.



## Add branching to a Numeric Range question

Create a list of possible numeric ranges for customer responses and the questions to branch to when the responses falls within a specified numeric range. Here are the steps for configuring branching for a Numeric Range question.

1. In the Navigation Pane, under the Survey, select the question you want to add branching to. The Question Settings are displayed in the workspace, including the **Branching** options.

Numeric Range Question				
Question Settin	gs			
Name	Numeric Range Question			
Description				
Question Prompt	Customer Satisfaction 1 💌 📐			
No input prompt	<defauk></defauk>			
No match prompt	<defauk></defauk>			
Question weight	1.00 📑 🗌 Ignore score for question			
Retries	3 📑			
Timeout	8 Seconds			
Question Categ	ories			
User Defined Catego				
	* *			
Branching				
>= = 50 💼	Wrapup Question	Add		
Op Value	Branch To	Up		
< 50	Multiple Choice buying			
>= 50	Wrapup Question	Down		
l		Remove		
Numeric				
Min 0 🚔				
Max 100 🚔				

- 2. To create the first branch to a question for a numeric range, under Branching, select an Operator from the drop-down list.
- 3. Next, enter a Value in the field.
- 4. Select the question to Branch To, and click Add.
- 5. To add additional branches to your question, repeat steps 2 through 4.
- 6. To arrange the order of the questions to Branch To, use the **Up** and **Down** buttons.
- When you have completed adding branching to the question, click Save Question.
   The branching for this question is displayed in the Navigation Pane below the question.

Note:

• Before you change the order of the questions in a survey, evaluate the impact it will have on the branching logic in that survey.

- You can only branch *forward* to a question; looping back to a previous question is not allowed.
- If question order changes that would cause a loop, the branching logic defaults back to Next Question.
- There is no branching for the last question in a survey.
- Branching logic is *not* saved to a question template.
- · Branching logic is copied to a saved survey template.

# **Change Log**

The following table summarizes the updates made to the Interaction Feedback Technical Reference, since 4.0 product availability.

Date	Changes
06-December-2011	Updated information on Minimum Acceptable Score value for a survey.
11-May-2012	Updated document for deleting custom questions from the Library
11-May-2012	Updated Copyright and Trademarks for 2012
04-June-2012	General edits to flow of document for new content
06-June-2012	Updated document for new On-demand surveys
14-June-2012	Added new information for adding branching logic to surveys
26-June-2012	Added additional information and references for initiating on-demand surveys in Interaction Attendant
17-August-2012	Updated information for fields in Search Results grid
22-August-2012	Added additional information for Deactivating a survey
10-September-2012	Updated Recording ID for dynamic link to recording
17-January-2013	Added information for additional ways to create Public and Private searches
28-January-2013	Updated Information for Rule Condition values being case sensitive
05-February-2013	Added information for Question Text box in Create Question Wizard
23-July-2013	Updated graphic for required Question Prompt
10-June-2014	Updated copyright and trademarks
23-June-2014	Removed references to deprecated I3_ACCESS_FEEDBACK_SUPERVISOR_PLUGIN license
23-June-2014	Updates for I3_FEATURE_INBOUND_FEEDBACK license and I3_FEATURE_POST_CALL_FEEDBACK licenses
03-July-2014	Added new information for automatically presenting a survey to caller
25-August-2014	Updated documentation to reflect changes required in the transition from version 4.0 SU# to CIC 2015 R1, such as updates to product version numbers, system requirements, installation procedures, references to Product Information site URLs, and copyright and trademark information.
26-August-2014	Updated Installation instructions for Interaction Feedback client
14-January-2015	Updated Copyright and Trademarks for 2015
14-January-2015	Updated information for Interaction Feedback reports in Interaction Reporter
14-January-2015	Added information for Completed survey state for Free Form response
19-January-2015	Added information on clearing the language attribute on a free-form survey
07-April-2015	Additional updates for Interaction Feedback reports in Interaction Reporter
08-April-2015	General usability documentation updates
06-July-2015	Added information for copying Search Results information from datagrid to clipboard
14-July-2015	Updated title page for new rebranding
02-October-2015	Updated screen captures for rebranding

20-December-2016	Updated information for the Retries logic
12-April-2017	Updated Copyright and Trademark information
25-August-2017	Updated terminology for Genesys rebranding
05-September-2017	<ul> <li>Updated rebranded screen captures for New Surveys and for New Question Wizards</li> <li>Updated Title page for rebranding</li> </ul>
21-September-2017	Update for Survey View
31-October-2017	Updated licensing information for Access license
19-December-2017	Updated graphics for UI change for Minimum Acceptable Percentage
09-February-2018	Updates for HTML5 conversion
20-February-2018	Edits for Library
15-January-2019	Screen capture updates for UI and displayed text strings
17-April-2020	Updated description of ranking scale in Define the ranking scale topic.
30-April-2020	Updated links from my.inin.com to new locations.