

## Cisco Unified Workforce Optimization 1.2 for Cisco Unified Contact Center Express

Cisco® Unified Communications Solutions unify voice, video, data, and mobile applications on fixed and mobile networks, enabling easy collaboration every time from any workspace.

### Product Overview

For many businesses, the contact center is a strategic connection point with customers. Each positive customer experience supports corporate business objectives, such as increased sales and customer loyalty. But with the daily pressure to satisfy customer demands, it can be a challenge to keep contact center people and processes aligned with corporate business objectives — whether it is in sales performance or profitability. To manage these expectations, it is the contact center supervisor who must deliver. It is the supervisor's job to balance the goals of the business with the customer experience and agent behavior.

To help companies provide efficient, effective, customer-focused service in the contact center, supervisors must have the tools they need to manage team performance. Cisco Unified Workforce Optimization helps supervisors and other managers align contact center performance with business objectives by integrating workforce optimization within the team's daily workflow.

Cisco Unified Workforce Optimization, an optional set of software applications that supervisors can use in conjunction with Cisco Agent Desktop and Cisco Supervisor Desktop, empowers supervisors with information in real time and gives them the tools they need to evaluate and continually improve team performance and customer satisfaction.

### Features and Benefits

Cisco Unified Workforce Optimization is directly integrated within Cisco Supervisor Desktop, which unifies the tactical tools for supervisors with the tools they need to optimize team performance: Cisco Unified Workforce Optimization applications include Workforce Management and Quality Management software.

- Cisco Unified Workforce Optimization **Workforce Management** allows contact center managers to develop schedules for multiple sites, manage critical performance indicators, and manage real-time adherence to schedules
- Provide consistent customer service levels and manage employee adherence
- Improve customer loyalty and increase revenue
- Deliver more efficient staff utilization through effective scheduling
- Improve contact quality and maintain or reduce labor costs
- Cisco Unified Workforce Optimization **Quality Management** is a recording, compliance, and evaluation solution for agent performance optimization and dispute resolution — architected to meet the unique requirements of virtual contact centers.

Quality Management helps monitor and measure the contact center's contribution to overall business objectives.

- Improve agent knowledge through evaluations and feedback
- Ensure customer satisfaction and loyalty
- Increase revenue and profitability

### **Workforce Management**

Part of the complete Cisco suite of customer interaction and workforce optimization software, Workforce Management provides the information supervisors need to schedule or forecast staffing to provide the highest level of customer service and make short- or long-term adjustments as required to maintain service levels.

When the average contact center spends 65 percent of its budget on human resources, what could have a greater influence on customer service, customer satisfaction, efficiency, and costs than balanced staffing? Yet workforce management can be complex for many contact centers — particularly smaller centers that cannot afford high-end packaged solutions.

Workforce Management offers simple integration; it is easy to learn and simple for managers and supervisors to use because it allows them to produce agent schedules in a single step.

Key features include:

- Forecasting and scheduling
- Real-time adherence management
- Agent access to schedules and shift trades
- Multi-skill agent queuing
- Project scheduling
- 100 percent web browser-based user interface
- Role-based user dashboards

The Workforce Management component (Figure 1) of Cisco Unified Workforce Optimization is an excellent solution for next-generation contact centers to:

- Accurately forecast contact volume and distribution based upon historical trends
- Schedule contact center personnel to meet target service levels based upon customized work-shift policies
- Manage contact service levels through intraday dashboards and real-time adherence views
- Apply unique business rules by channel type for multichannel contact center support

**Figure 1.** Workforce Management Team Scheduling Integrated into Cisco Supervisor Desktop

The screenshot displays the Cisco Supervisor Desktop interface for Workforce Management. The main window shows a table of agent schedules and adherence data. The table includes columns for Phone ID, Last Name, First Name, NR, RE, TK, OH, WK, LO, Scheduled Activity, Adherence, Scheduled Arrival, Actual Arrival, Break Start, Break End, and Schedule. The data is organized into sections: Forecasting, Intraday, Post-Production, Adherence, and My Page. The Adherence section is currently selected, showing a list of agents with their respective adherence status (indicated by green and red dots) and timing details.

Phone ID	Last Name	First Name	NR	RE	TK	OH	WK	LO	Scheduled Activity	Adherence	Scheduled Arrival	Actual Arrival	Break Start	Break End	Schedule
1601	Ring	Sharmaine							in Service	●	09:00	-	15:00	15:15	-
1602	Gleper	Faith			●				in Service	●	09:00	00:00	14:30	14:45	-
1603	Tavoularis	Evan							in Service	●	09:00	-	14:15	14:30	-
1701	Pennington	Melville							N/A	●	00:00	-	-	-	-
1702	Greif	Deidra							N/A	●	00:00	-	-	-	-
1703	Jones	Carter							N/A	●	00:00	-	-	-	-
1801	Beeger	Maxwell							N/S	●	-	-	-	-	-
1802	Stafford	Miles						●	N/A	●	16:30	01:26	18:15	18:30	-
1803	Kooser	Roland			●				N/A	●	17:00	00:00	18:45	19:00	-
1901	Harris	Eric							in Service	●	06:00	-	-	-	-
1902	Reynolds	Harold							in Service	●	06:00	-	-	-	-
1903	Munson	Darleen							in Service	●	06:00	-	-	-	-
2601	Ruch	Jepson							in Service	●	09:00	-	15:00	15:15	-
2602	Watters	Cathy			●				in Service	●	09:00	12:34	14:45	15:00	-
2603	Sands	Luke							in Service	●	09:00	-	14:30	14:45	-
2701	Foster	Amber							N/A	●	00:00	-	-	-	-
2702	Focell	Crystal						●	N/A	●	00:00	00:00	-	-	-
2703	Earl	Shaun							N/A	●	00:00	-	-	-	-
2801	Veith	Scotty							N/A	●	16:30	-	18:30	18:45	-
2802	Flanders	Kailee						●	in Service	●	06:00	00:00	-	-	-
2803	Frayar	Danny							N/A	●	17:00	-	19:00	19:15	-
2901	Dimsdale	Loraine							in Service	●	06:00	-	-	-	-
2902	Northev	Devon						●	in Service	●	06:00	00:00	-	-	-

## Quality Management

The Quality Management component (Figure 2) of Cisco Unified Workforce Optimization is a highly scalable voice and screen recording and evaluation solution that supports agents and supervisors at any location. Quality Management is available in two versions: Advanced Quality Management, which consists of voice and screen recording, and Quality Management, which consists of voice recording only.

Key features include:

- Voice and screen recording
- Workflow-based contact selection
- Configurable evaluation form templates
- Easy categorization and feedback mechanisms
- 100 percent voice recording for compliance
- Knowledge worker recording
- Clear, role-based dashboard reports
- Archive search capabilities let you locate recorded calls quickly and easily
- Flexible, reliable architecture (endpoint recording, server-based recording or both)
- Easy to implement and use
- PCI (Payment Card Industry) data security compliance

**Figure 2.** Quality Management Contact Player

The screenshot displays the Quality Management Contact Player interface. The main window shows a Salesforce account page for 'Acme'. The account details include:

- Account Name: Acme (New Hierarchy)
- Account Site: Charleston Road NY,NY
- Parent Account: [blank]
- Account Number: 2129517500
- Type: Prospect
- Industry: Manufacturing
- Annual Revenue: \$84,000,000.000
- Rating: Warm
- Phone: (212) 991-7900
- Fax: (212) 991-7900
- Website: http://www.acme.com/
- Ticker Symbol: ACC
- Ownership: Public
- Employees: 8,000
- SIC Code: [blank]
- Billing Address: 1800 Charleston Rd, New York, NY 11345, USA
- Shipping Address: 1800 Charleston Rd, New York, NY 11345, USA
- Description: Acme Inc. (NYSE: ACC) is one of America's largest and best-performing multi-industry companies. Headquartered in New York, Acme ranks 194th on the FORTUNE 500 list of largest U.S. companies.
- Custom Links: news, financial profile, map

The interface also features an 'Evaluation Form' at the bottom with the following details:

- Total: 0 Possible: 12 Weighted Percent: 0%
- Applications: 25% | Greeting: 25% | Handling Objections: 25% | Closing: 25%
- Questions:
  - 1.1 Efficient and effective utilization of Cisco Agent Desktop? (No, Yes, NA)
  - 1.2 Opens appropriate company and contact within Salesforce.com? (No, Yes, NA)
  - 1.3 Creates a new contact entry for any caller not in system? (No, Yes, NA)

The Quality Management software uses the agent's PC to record and process the voice and screen transactions for performance evaluation and compliance. This unique endpoint recording architecture minimizes hardware and bandwidth usage for multisite contact centers, making it practical to deploy an effective quality management program in virtual environments.

- Transactions of interest are selected and processed if they meet established business criteria.
- Supervisors review and score the transactions against critical performance metrics, creating initiatives for quality improvements and training.
- Individual and team performance reports show trends that propel initiatives for quality improvement and training at the team and agent levels.
- Real calls can be used to create best-practice training modules for an existing agent coaching system.

With the release of Cisco Unified Workforce Optimization 1.2, Quality Management now includes:

- Server-based recording, used in environments where the agent's PC does not support the use of the Quality Management endpoint recording service. Server-based recording is ideal for Citrix and Windows Terminal Services environments. Note: You can combine server-based and endpoint recording in a single deployment to provide the customer a flexible recording platform.
- A graphical dashboard, visually displaying critical quality metrics

- Up to 10 custom metadata fields, providing the ability to append important enterprise and customer data (through interactive voice response [IVR], customer relationship management [CRM], or other) to recordings for easy search and retrieval
- Application programming interfaces (APIs) for call tagging, partial call recording, and bulk exporting based on metadata
- Non-automatic call distributor (ACD) user administration (for knowledge worker recording)
- Team-by-team configuration for 100-percent call recording
- Supervisor evaluation approvals
- System monitoring and notification utility that can integrate with an existing network monitoring solution
- Recording file export in .wav or Windows media formats

Together with Cisco Unified Workforce Optimization Workforce Management and Cisco Supervisor Desktop, the Quality Management software streamlines the quality management process to help ensure that standards are being met and training and improvements are implemented when required.

## System Requirements

### Server Requirements

Table 1 gives the server requirements for Cisco Unified Workforce Optimization. Requirements are based on the number of users.

**Table 1.** Application Server Requirements for Cisco Unified Workforce Optimization Host

	Configured Users	Concurrent Users	Quality Management	Workforce Management
<b>Server hardware (one per application type based on number of users)</b>	Fewer than 450	Fewer than 150	Cisco MCS 7816 Media Convergence Server	Cisco MCS 7835
	Fewer than 900	Fewer than 300	Cisco MCS 7825	Cisco MCS 7845
<b>Server operating system</b>			Windows Server 2003 R2 Standard, one server, and five CALs	Windows Server 2003 R2 Standard, one server, and five CALs
<b>Server database</b>			Sequenced Query Language (SQL) Server 2005 Standard, processor license recommended	SQL Server 2005 Standard, processor license recommended
Server storage: Quality Management recordings require storage space of 120 KB/min for voice and 1.2 MB/min for screen capture, and they may require additional internal or external network-access-server (NAS) or storage-area-network (SAN) storage to meet needs.				

### Quality Management PC Requirements

Table 2 outlines PC requirements for the Quality Management component of Cisco Unified Workforce Optimization.

**Table 2.** Quality Management PC Requirements

Quality Management Recording Client PC Requirements	Basic	Advanced
<b>Processor</b>	500+ MHz or 1+ GHz for Vista	2+ GHz
<b>Memory</b>	256+ MB or 1 GB for Vista	2+ GB
<b>Ethernet network interface card</b>	Supports promiscuous mode	Supports promiscuous mode
<b>Ethernet connection</b>	Connected through phone	Connected through phone
<b>Operating system</b>	Windows Vista or XP	Windows Vista or XP

## Ordering Information

To order Cisco Unified Workforce Optimization, use the information in Table 3, which outlines all part numbers to order Cisco Unified Workforce Optimization for each version of Cisco Unified Contact Center Express.

**Table 3.** Ordering Information for Cisco Unified Workforce Optimization Software and Maintenance Components

	Quality Management Basic - Voice Only Recording	Advanced Quality Management - Voice and Screen Recording	Workforce Management		
	Cisco Unified Contact Center Express 7.0.0 Part Number	Cisco Unified Contact Center Express 7.0.0 Part Number	Cisco Unified Contact Center Express 5.0.0 Part Number	Cisco Unified Contact Center Express 6.0.0 Part Number	Cisco Unified Contact Center Express 7.0.0 Part Number
<b>Software license</b>	CCX-70-QM-S1	CCX-70-AQM-S1	CCX-50-WFM-S1	CCX-60-WFM-S1	CCX-70-WFM-S1
<b>Media kit</b>	CCX-70-QM-MEDKIT	CCX-70-AQM-MEDKIT	CCX-50-WFM-MEDKIT	CCX-60-WFM-MEDKIT	CCX-70-WFM-MEDKIT
<b>Software maintenance</b>	CON-ESW-70QMS1	CON-ESW-70AQM-S1	CON-ESW-50WFMS1	CON-ESW-60WFMS1	CON-ESW-70WFMS1
<b>Software subscription 1 year</b>	UCSS-QM-1-1	UCSS-AQM-1-1	UCSS-WFM-1-1	UCSS-WFM-1-1	UCSS-WFM-1-1
<b>Software subscription 2 years</b>	UCSS-QM-2-1	UCSS-AQM-2-1	UCSS-WFM-2-1	UCSS-WFM-2-1	UCSS-WFM-2-1
<b>Software subscription 3 years</b>	UCSS-QM-3-1	UCSS-AQM-3-1	UCSS-WFM-3-1	UCSS-WFM-3-1	UCSS-WFM-3-1

**Note:** Cisco Unified Workforce Optimization applications are sold per named user, not concurrent user.

## Cisco Unified Communications Services

Cisco Unified Communications Services allows you to accelerate cost savings and productivity gains associated with deploying a secure, resilient Cisco Unified Communications Solution. Delivered by Cisco and our certified partners, our portfolio of services is based on proven methodologies for unifying voice, video, data, and mobile applications on fixed and mobile networks. Our unique lifecycle approach to services can enhance your technology experience to accelerate true business advantage.

## Summary

Cisco Agent Desktop and Cisco Supervisor Desktop, together with Cisco Unified Workforce Optimization software, align your contact center business processes with business objectives by integrating workforce optimization within the team's daily workflow. Cisco Unified Workforce

Optimization combines agent desktop tools with workforce-optimization software to unify the entire customer interaction process for agents and supervisors.

The Cisco Agent Desktop enforces best practices by unifying agent productivity tools, automating transaction workflows, and facilitating team collaboration. The Cisco Supervisor Desktop integrates team coaching and collaboration tools with Cisco Unified Workforce Optimization Quality Management, Workforce Management, and performance management reporting components.

Cisco Unified Workforce Optimization allows supervisors and managers to take immediate action or plan evaluations and adjustments to optimize contact center team performance — leading to increased customer satisfaction and continuing the evolution toward a true Customer Interaction Network.

### For More Information

For more information about the Cisco Unified Workforce Optimization, visit <http://www.cisco.com/en/US/products/ps8293/index.html> or contact your local Cisco account representative.



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