



Webex Experience Management Digital Channel Survey

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Overview

Digital Channel Survey is initiated when the agent responds to an email/chat from a customer using the Enterprise Chat and Email gadget. Cisco Webex Experience Management is a Customer Experience Management (CEM) platform that allows you to see the business from your customers perspective. It provides customer journey experience using the CEJ omni-channel gadget. To learn more about Webex Experience Management, see <https://xm.webex.com/docs/ccoverview/>.

With Webex Experience Management, Unified CCE supports:

- Customer experience surveys - Set up and send surveys to customers, after an interaction, to collect feedback about their interaction.
- Customer Experience Journey (CEJ) gadget - Displays all the past survey responses from a customer in a chronological list. The agent and supervisor use this gadget to gain context about the customers past experiences with the business and engage with them appropriately.
- Customer Experience Analytics (CEA) gadget - Displays the overall experience of the customer interaction with agents using industry-standard metrics such as NPS, CSAT, and CES or other KPIs tracked within Experience Management. This gadget is available for agents and supervisors.

Digital Channel Survey

Email and chat inline surveys are used to determine whether customers are satisfied with their interaction with the agent in resolving their query over an email or chat. The feedback collected through the survey is used by the agents to gain context about the customer in their subsequent interactions and to also improve

their own performance. You can configure Enterprise Chat and Email to initiate this survey when the agent sends an email or terminates a chat conversation with a customer. The survey is sent inline in the agents email response to customers who contact them via email, and within the chat window for customers who contact them via chat.

Digital Channel Survey Task Flow (Email/Chat)

To enable Experience Management inline surveys with Enterprise Email and Chat in Cisco Unified CCE, perform the following procedure:

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- Step 1** Contact your Cisco representative to purchase Experience Management license. Provide relevant information about your organization to Experience Management Activation Team. To know more about the information that will be collected, see [Prerequisites](#).
- Step 2** Experience Management Activation Team performs the following actions:
- Creates account and provisions the same.
 - Creates default spaces and metric groups for your accounts. To know more about creating spaces, see [Space Creation](#).
 - Creates default questionnaires in Experience Management suited for inline email and chat survey. To know more about creating your own questionnaires or editing the default ones, see [Questionnaires](#).
- Step 3** After creating and provisioning the account, you will receive handover emails from the Experience Management Activation Team. The email contains credentials and other essential information for your account. To know more about provisioning details, see [Handover](#).
- Step 4** Initially, Spaces and Widgets are created by the Experience Management provisioning team. To know more about the different default Widgets and how to export and derive meaningful insights from them, see [Cisco Webex Experience Management Gadgets](#).
- To know how to configure other Widgets in Experience Management, see [Basic Widget](#) and [Composite Widgets](#).
- Step 5** Ensure that the Cloud Connect publisher and subscriber are installed. For more information, see the *Install Cloud Connect* section in *Cisco Unified Contact Center Enterprise Installation and Upgrade Guide* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-installation-guides-list.html>
- Step 6** Provision Experience Management service using CLI on Cloud Connect. For more information, see [Provision Cloud Connect for Digital Channel Survey, on page 3](#).
- Step 7** Ensure that the Enterprise Chat and Email (ECE) is installed and configured, see the *Webex Experience Manager Integration* in *Enterprise Chat and Email Administrator's Guide to Administration Console* at <https://www.cisco.com/c/en/us/support/contact-center/enterprise-chat-email-12-5-1/model.html>.
- Step 8** Configure Unified CCE Experience Management integration. For more information, see [Configure Unified CCE for Digital Channel Survey , on page 3](#).
- Step 9** Configure Call Type and Dialed Number. For more information, see [Configure Call Type, Dialed Number, and Survey Association, on page 5](#).
- Step 10** Modify CCE Scripts. For more information, see *Modify CCE Scripts for Experience Management Digital Channel Surveys* in *Scripting and Media Routing Guide for Cisco Unified ICM/Contact Center Enterprise* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-user-guide-list.html>.
- Associate the CCE script with the Call Type created in the previous step.
- Step 11** Provision Cloud Connect on Cisco Finesse. For more information, see the *Cloud Connect Server Settings* topic at the [Cisco Finesse Administration Guide](#).

- Step 12** Add Experience Management gadgets into Finesse desktop layout. For more information, see [Cisco Webex Experience Management Gadgets](#).
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Provision Cloud Connect for Digital Channel Survey

Before provisioning Cloud Connect for Experience Management service, ensure to setup and enable Cloud Connect. For more information, see the *Cloud Connect Administration* section in [Administration Guide for Cisco Unified Contact Center Enterprise](#)



Note Ensure that you have installed the self-signed certificates for Cloud Connect. For more information, see the *Self-Signed Certificates* section in the [Cisco Unified Contact Center Enterprise Installation and Upgrade Guide](#).

Provision Experience Management service using the following CLI on Cloud Connect.

```
set cloudconnect cherrypoint config
```

For more commands related to Experience Management service, see the *Cloud Connect CLI* section in the [Cisco Unified Contact Center Enterprise Installation and Upgrade Guide](#).

Configure Unified CCE for Digital Channel Survey

Refer to the following procedures to enable the Experience Management email and chat survey:

- [Configure Expanded Call Variables](#) , on page 3
- [Configure Call Type, Dialed Number, and Survey Association](#), on page 5
- [Associate Survey to Call Type in Unified CCE Admin](#), on page 5

Configure Expanded Call Variables

- Step 1** In the **Configuration Manager** menu, select **Tools > List Tools > Expanded Call Variable List**. The **Expanded Call Variable List** window appears.
- Step 2** Click **Retrieve** to view the list of existing ECC variables.
- Step 3** Check if the *user.microapp.isPostCallSurvey* variable exists. If the variable does not exist, do the following to create a new variable:
- a) Click **Add**.
 - b) In the **Attributes** tab that appears, enter *user.microapp.isPostCallSurvey* in the **Name** field.
 - c) Set **Max Length** to 1.
 - d) Check the **Enabled** check box.
 - e) Click **Save**.

When your CCE routing scripts starts, you can turn off Post Call Survey field in the script by setting `user.microapp.isPostCallSurvey` to `n`. You can later enable Post Call Survey in the same path of the script by setting this variable to `y`.

Note In the script, set the `user.microapp.isPostCallSurvey` before routing it to the agent.

Note To enable Experience Management, `user.microapp.isPostCallSurvey` must be set to `y`.

Step 4 Check if the `user.CxSurveyInfo` variable exists. If the variable does not exist, do the following to create a new variable:

- a) Click **Add**.
- b) In the **Attributes** tab that appears, enter `user.CxSurveyInfo` in the **Name** field.
- c) Set **Max Length** to 80.
- d) Check the **Enabled** check box.

Step 5 Click **Save**.

Note The newly created ECC variables are added to the default payload list. If you want to save the ECC variables to a different payload list, in the **Configuration Manager**, navigate to **Tools > List Tools > Expanded Call Variable Payload List** and add the ECC variables to the payload list of your choice.

Note You can use several ECC payloads in the same call flow, but only one ECC payload has scope at a given moment. For more information, see *ECC Payloads* sections in *Configuration Guide for Cisco Unified ICM/Contact Center Enterprise* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-installation-and-configuration-guides-list.html>

Step 6 Populate the **POD.ID** variable.

For more information on populating this variable, refer to the topic [Configure POD.ID](#), on page 4.

Configure POD.ID

Cisco provided variables are predefined, but for POD.ID, the maximum length should be set to 120. Enable the POD.ID variable to edit its length.

You can modify the variables only if you have the edit access.

Populate the value in the script with multiple attributes in a key-value pair format. Each key-value pair is separated with a semi-colon. These attributes are sent to the Webex Experience Management as prefills when ECE initiates the survey. The following table displays the supported attributes:

Table 1: Variables and their descriptions

Attribute	Description	Applicable
cc_CustomerId	Unique ID for a customer across multiple channels	Chat and Email surveys for Digital Channels
Email	Email ID of the customer for Email survey across multiple channels	Chat and Email surveys for Digital Channels
Mobile	Phone number for Chat surveys	Chat and Email surveys for Digital Channels

Example: `cc_CustomerId=xxx;Email=xx;Mobile=xxx;`

For more information on setting the ECC variables used in the example, see *Modify CCE Scripts for Experience Management Digital Channel Surveys* in *Scripting and Media Routing Guide for Cisco Unified ICM/Contact Center Enterprise* at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-user-guide-list.html>.

For more information on **Expanded Call Context Variables**, see the chapter *Configuring Variables* in the Configuration Guide for Cisco Unified ICM/Contact Center Enterprise at <https://www.cisco.com/c/en/us/support/customer-collaboration/unified-contact-center-enterprise/products-installation-and-configuration-guides-list.html>.

Configure Call Type, Dialed Number, and Survey Association

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- Step 1** In ICM Configuration Manager, navigate to **Tools > List Tools > Call Type List** to create a Call Type.
- Step 2** Associate the survey with the last call type before the email/chat is handled by the agent.
- For more information, refer to the topic [Associate Survey to Call Type in Unified CCE Admin, on page 5](#).
- Step 3** Create a Dial Number in ICM Configuration Manager and associate it with Call type (created in Step 1) for email and chat.
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Associate Survey to Call Type in Unified CCE Admin

You can associate the survey to the Call Type only if you have added **Cloud Connect** to the **Inventory** page in **CCE Admin** and configured the survey in **Webex Experience Management** portal.



Note Only inline surveys can be associated to a Call Type associated with digital channels.

Call Types are created and managed in **Configuration Manager** tool and the survey is associated using the **CCE Admin** tool.

- Step 1** In **Unified CCE Administration**, navigate to **Overview > Call Settings > Route Settings > Call Type**.
The list of all the **Call Type** are displayed.
For more information on Call Types, refer to the **Help** in **Configuration Manager > Tools > List Tool > Call Type List**.
- Step 2** Click on the **Call Type** which you want to associate to the Survey.
- Step 3** Select the **Enable Experience Management** check box to associate the **Webex Experience Management** survey.
- a) The Experience Management tab is enabled with the following options:
- Inline Survey
 - Deferred Survey

Step 4 Select **Inline Survey** for email and chat.

- Click on the **magnifying glass** icon, and the configured surveys will be populated in the pop-up window.

Step 5 Select the survey from the pop-up window and click **Save**.
