



# Webex Workforce Optimization

# Contents

04	Call recording and quality management
07	Workforce Management (WFM)
09	Analytics
11	Insights – AI-powered Reporting
14	Ordering Information
14	Cisco Collaboration Flex Plan
15	Cisco and partner services
15	Cisco environmental sustainability
16	Cisco Capital
16	For more information





## Empower contact center supervisors to optimize agent performance and customer satisfaction

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 ensure efficient, customer-focused service, every role in the contact center needs the right tools. **Agents** gain more control over their workload with self-scheduling and clear performance insights, helping them stay productive and engaged. **Supervisors and team leads** can effectively balance business goals with customer experience, ensuring teams perform at their best. **Schedulers and forecasters** optimize staffing with powerful forecasting tools, reducing overwork and improving service levels. **Analysts** uncover trends and drive strategic decisions with data-backed insights. By aligning people, processes, and technology, contact centers can enhance operational efficiency, empower employees, and deliver exceptional customer experiences.

Webex® Workforce Optimization (WFO) transforms the contact center experience by providing deeper insights

and powerful tools in simplified, flexible views—helping teams work more efficiently and deliver exceptional customer experiences.

Webex WFO is a comprehensive suite designed to enhance contact center operations by integrating various capabilities for team performance management. You can enhance operational efficiency with tools that provide data-driven insights to effectively manage staffing and improve agent performance. Contact center leaders can increase agent engagement with improved performance insights, better workload management and tools that help boost productivity. In terms of business operations, you can increase visibility and simplify operations with a single, unified solution for all speech, text, and desktop analytics.

Webex WFO is comprised of a rich set of capabilities which includes:

- Call Recording
- Quality Management
- Workforce Management
- Analytics
- Insights: an AI-powered contact center business intelligence tool

# Suite of applications

## Call Recording and Quality Management

The call recording and quality management component of Webex Workforce Optimization is a highly scalable voice and screen call recording and quality evaluation solution that supports agents, knowledge workers, and supervisors at any location.

- **Call Recording** enables 100-percent call recording of agents or knowledge workers for compliance and transaction verification and includes on-demand recording and archiving. It also includes the search and play application to find and play back recordings.\*
- **Quality Management** provides audio and screen call recording, quality evaluations, customizable performance dashboards, and reports.

### Key features of the call recording and quality management application include:

- Voice and screen recording.
- Live voice and screen monitoring\* Workflow-based contact recording.
- Automatically assign calls of interest for review, evaluation, or calibration.
- Configurable quality evaluation forms, including points and percentage-based scoring, section-and question-level weighting, and unlimited number of sections and questions.
- Customizable metadata fields, providing the ability to append important enterprise and customer data to recordings for easy search and retrieval.
- The ability to export calls in bulk for compliance and transaction verification through the recording export application.
- 100-percent voice recording for compliance and transaction verification.
- Non-agent or knowledge worker recording.

- **Webex WFO provides comprehensive Quality Management (QM)** capabilities that allow organizations to evaluate, score, and generate insights from customer interactions across multiple channels, including SMS, chat, email, and voice. This ensures that customers can maintain high-quality service standards and continuously improve agent performance across channels.
- Insights AI-fueled custom reporting with rich data visualizations like phrase clouds and interactive charts.
- Evaluation calibration capabilities, enabling contact center managers to benchmark evaluators.
- Configurable and graphical reporting.
- Role-based alerts to streamline evaluation workflows.
- Advanced search capabilities that let you locate recorded calls quickly and easily.
- The ability to export recorded files in .wav or Windows media formats.
- Payment Card Industry (PCI) data security compliance.
- A system monitoring and notification utility that can alert through email or existing Simple Network Management Protocol (SNMP)-based network monitoring solutions; it can also match recording events to Call Detail Records (CDRs).
- A real-time recording status application that provides peace of mind that lines are recording.\*
- Multiple recording storage locations that help ensure reliability if a server failover occurs.
- Screen recording by workflow and automated screen-only recording.
- Recording service redundancy and load balancing to support fault tolerance.\*
- Hyperlink access to recordings, which allows access to the recordings right from the Customer Relationship Management (CRM) database for playback and review.

The call recording and quality management software supports three recording methods:\*\*

1. **Desktop recording** is a software recording service executed on the recorded user's PC.
2. **Network-based recording** uses a recording server that receives telephony packets directed to it from the built-in bridge on the recorded user's IP phone under the direction of Cisco Unified Communications Manager (UCM) and controlled by the recording workflow on the recording server processing the user's CTI events.
3. **Cisco Unified Border Element (CUBE) gateway recording** includes media forking from CUBE to a record server, which then encrypts and uploads into the call recording and quality management system per the user's workflow configuration.

Webex Workforce Optimization call recording and quality management includes:

- Enhanced user experience for agent, supervisor, and evaluator roles.
- A speech energy bar, including a timeline, visual comments, and metadata tagging, which speeds the quality analysis process and provides additional context to evaluations.
- Speech energy data for talk-over and silence, which allows evaluators to quickly flag potential customer service concerns.\*
- Advanced media player that provides a complete view of interactions with embedded AI-powered analytics, including transcription, sentiment, speech, desktop, and text analysis, along with call data.\*

For all call recording types, transactions of interest are selected and processed if they meet established business criteria such as:

- 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 promote 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.
- As part of Webex Workforce Optimization that also includes workforce management, and AI-fueled analytics, the call recording and quality management software streamlines the quality management process to help ensure that standards are being met and that training and improvements are implemented when required.

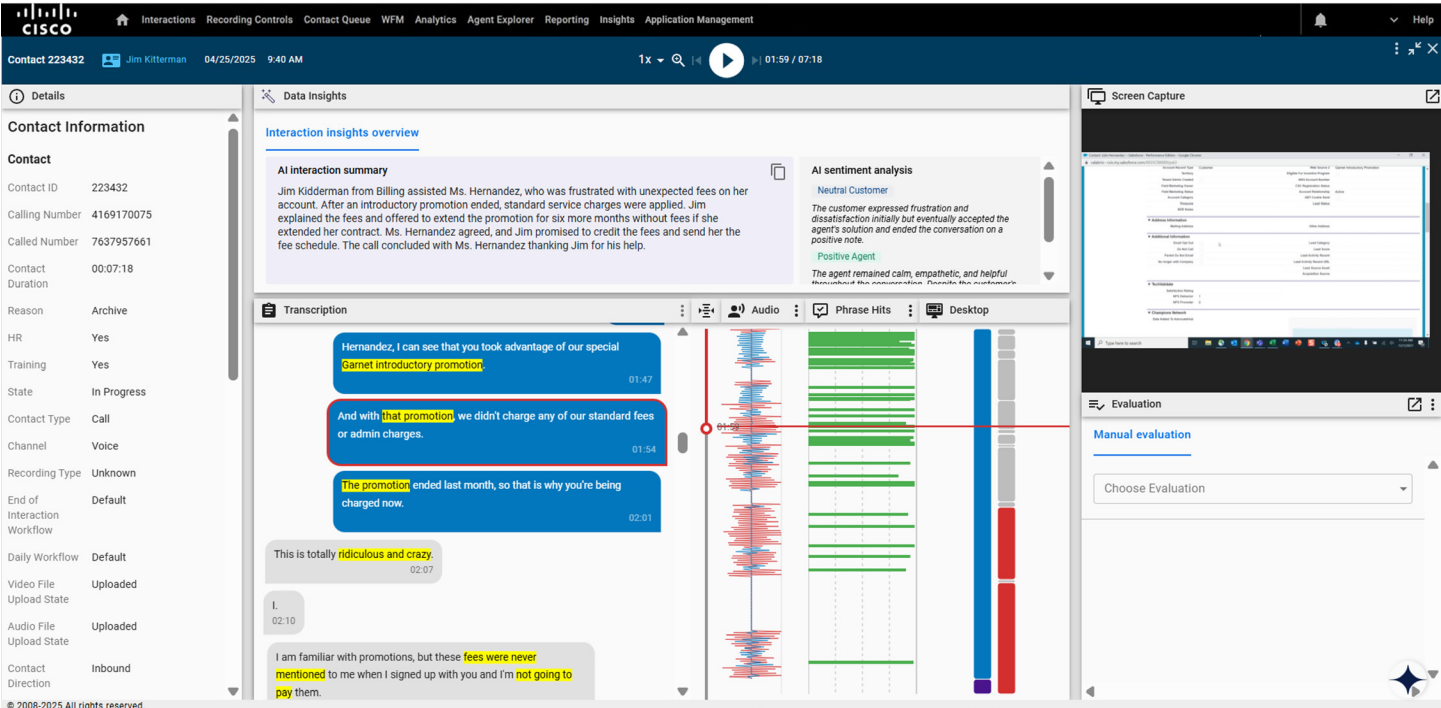


Figure 1. AI-fueled media player with embedded speech, text, desktop, and sentiment analysis

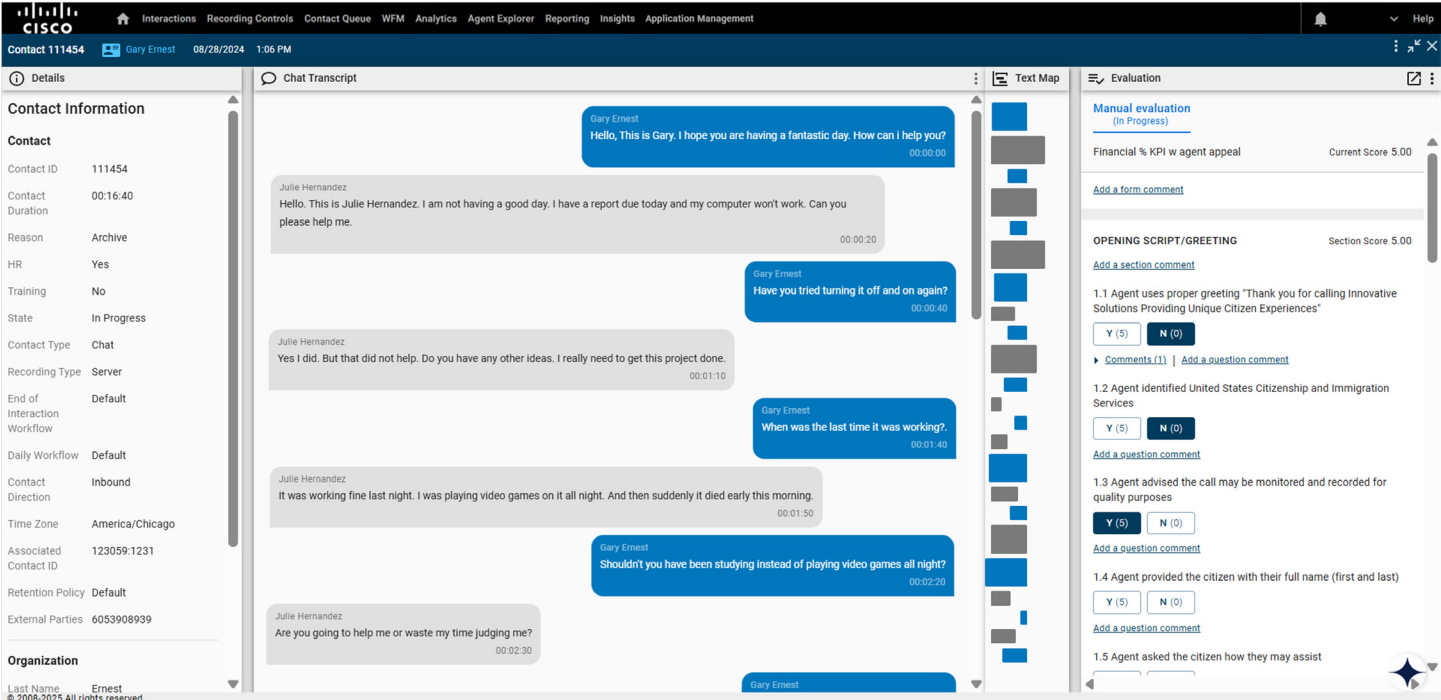


Figure 2. Omnichannel Quality Management

## Workforce Management (WFM)

A modern workforce management solution should do more than just digitize scheduling. It should help your people work smarter. It should help you make your people better. Webex Workforce Optimization workforce management gives you the toolset to get the very best from your people. Free managers from tedious scheduling so they can focus on strategic improvements and engage with real-time feedback and gamification.

When the average contact center spends 65 percent of its budget on human capital resources, balanced staffing can significantly influence customer service, customer satisfaction, efficiency, and costs. 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.

**Figure 1.** Shows an example of how contact center managers can quickly access an overview of individual agent performance at any time.

### Key features of the workforce management application include:

- Automated forecasting and scheduling.
- Real-time adherence management.
- Agent access to schedules and shift trades.
- Multi-skill agent queuing.
- Real-time alerts and notifications.
- Automated request approvals.
- An agent schedule view for supervisors, which provides agent and team schedules, adherence, and a coverage view on a single, unified screen.
- Drag-and-drop schedule editing, which allows supervisors to make quick and easy scheduling changes, preview the effect on performance, and put the changes into production.
- Intraday dynamic scheduling and dynamic availability to improve agent scheduling.

- Project scheduling.
- Shrinkage planning and intraday adjustment capabilities to match agent schedules to service-level goals.
- User interface that is 100-percent web browser-based.
- Role-based user dashboards, including widgets for supervisors to view the schedule, and adherence tracking for a named agent or group of agents or the goal and actual service level for selected service queues.
- Ability to hyperlink to third-party applications (to support integration for training and e-learning, for example).
- Ability to delineate between non-interactive and interactive contact options for multichannel forecasting.
- Updated user interface for shrinkage, adherence state mapping, and service queue group pages.
- Plan and allocate time for training, team-building, and other non-scheduled tasks.
- Audit trails and reports.

The workforce management application of Webex 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.
- Insights AI-fueled custom reporting with rich data visualizations like phrase clouds and interactive charts.



Figure 3. Cisco Webex Workforce Optimization 30,000 feet view

## Benefits for agents

- Self-scheduling options empower agents to manage their time effectively, leading to increased autonomy and reduced stress.
- Share your schedule – allows agents to subscribe and publish the workforce management schedule to a calendar of choice.
- Shift bidding and swapping allow agents to tailor their work hours based on personal needs.
- Automated forecasting helps ensure the right number of agents are scheduled at the right time, preventing over- or under-staffing, balancing workloads, and reducing burnout.



## Analytics

Webex Workforce Optimization analytics helps organizations gain data-driven insights to improve the customer experience and to drive revenue with every customer interaction.

Companies can analyze interactions and make valuable discoveries about your customers, employees, and business. With sophisticated speech, desktop, text, and predictive analytics, organizations can unlock a gold mine of intelligence buried in the contact center.

Empower contact center managers to transform every customer interaction into usable data. Then, distill that data into key trends and extract insights to drive profitable change across the business. Figures 1, 3 and 4 are screenshots of some of the analytics included with Webex Workforce Optimization.

With Webex Workforce Optimization analytics, your organization will be able to recognize the insights that can help you increase revenue, optimize efficiency, improve customer satisfaction, and validate compliance activity in your contact centers. Create non-siloed, holistic reporting that aligns with unique business goals. Then, easily share this information in simple-to-understand dashboards, graphs, charts and highly customizable reports across the enterprise.

### Key features of the analytics application include:

- Speech-to-text transcribed audio to full-text transcripts.
- Text analytics (phrase hits) for channels, including email, chat, text, and social media.\*
- Desktop analytics to track desktop activity, facilitate compliance, and create automated workflows with activity triggers.
- Interaction Summary, powered by Generative AI, creates concise, consistent summaries of customer conversations across voice and digital channels. It helps agents reduce after-call work and manual notes, supports evaluators in identifying which conversations to review, and gives supervisors quick context to plan more effective coaching.
- AI-powered Advanced Sentiment analysis, which translates all call interactions into a score of positive, neutral, or negative automatically with separate sentiment scores for agents and customers.
- Powerful, easy-to-use dashboards with drill-down capabilities.
- Predictive quality evaluation scores.
- Predictive Net Promoter Scores (NPS) using NPS survey data and speech data to automatically generate a predicted Net Promoter Score for 100 percent of your customer interactions.
- Phrase Manager automates the process of managing speech phrases.\*
- Language packs to help you understand customers, regardless of linguistics.
- Custom dictionary.
- Agent smart benchmarking.
- Advanced text search.
- Insights AI-fueled custom reporting with rich data visualizations like phrase clouds and interactive charts.
- Advanced customization dashboard capabilities.

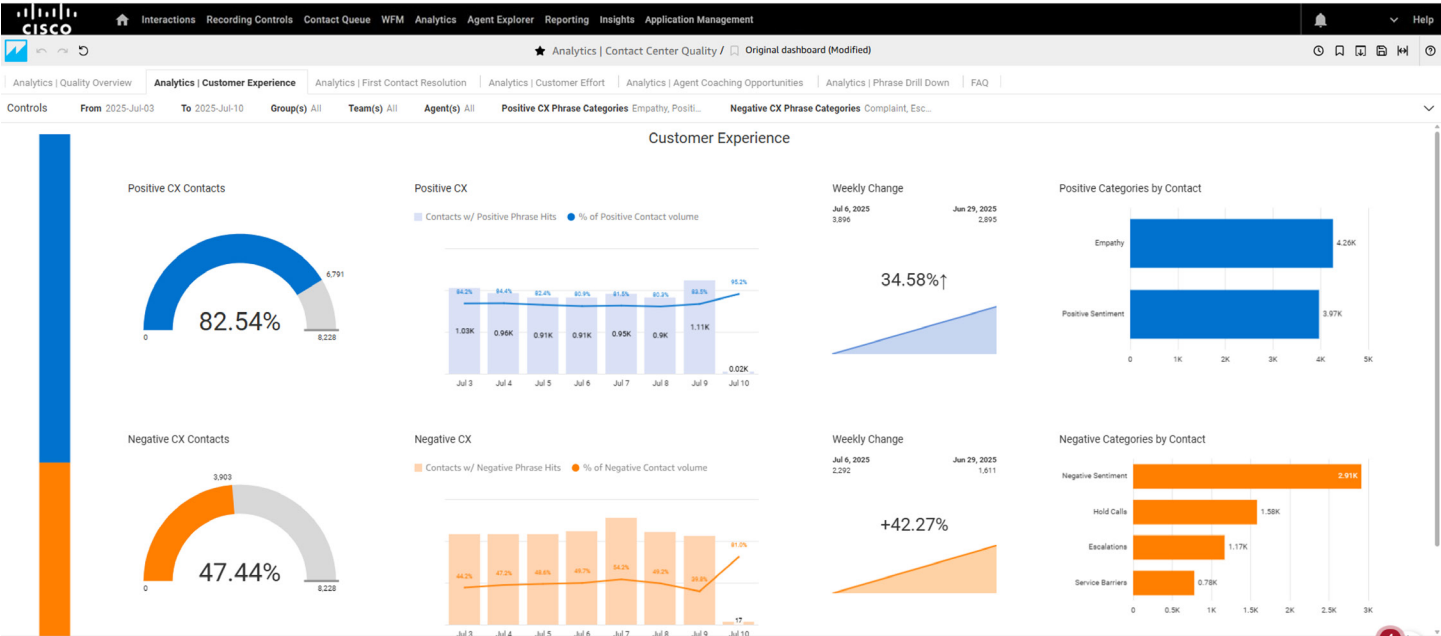


Figure 4. Analytics powered dashboard on customer experience

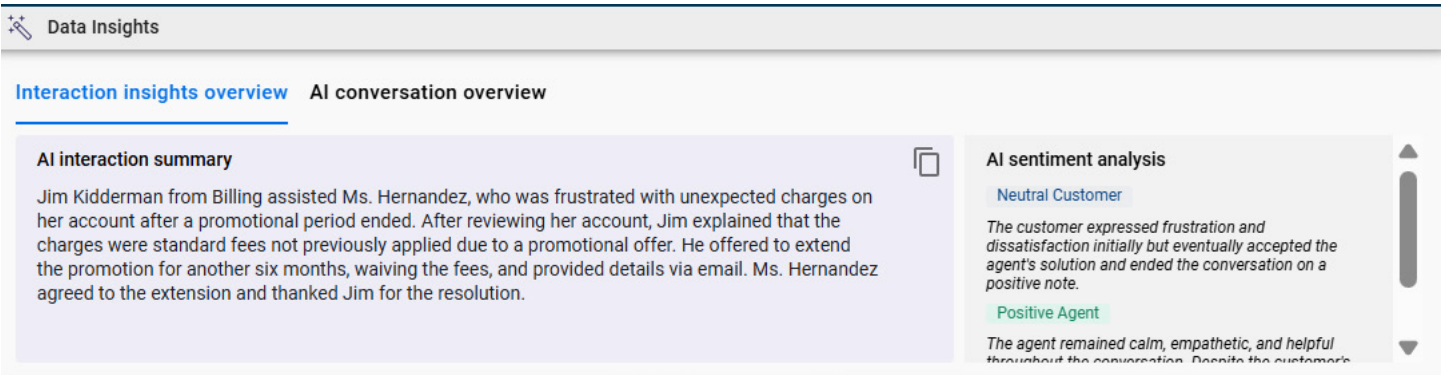


Figure 5. Interaction Summary and Advanced Sentiment

## Enterprise Analytics – advanced AI-powered analytics for your contact center

Enterprise Analytics enhances Webex Workforce Optimization with advanced AI-driven tools that work together to improve agent performance and customer experience. These capabilities help contact centers focus on the conversations that matter most, automate evaluations, and coach more effectively at scale. It includes all capabilities within Analytics and builds on them with deeper AI-powered automation.

- **Auto QM** automatically evaluates 100 percent of customer interactions against consistent performance criteria. AI-driven scoring delivers objective, unbiased insights to improve agent development and reduce manual evaluation effort.
- **Trending Topics** uses AI to analyze thousands of conversations and organize them into prioritized topics, helping identify top contact drivers and streamline root cause analysis.

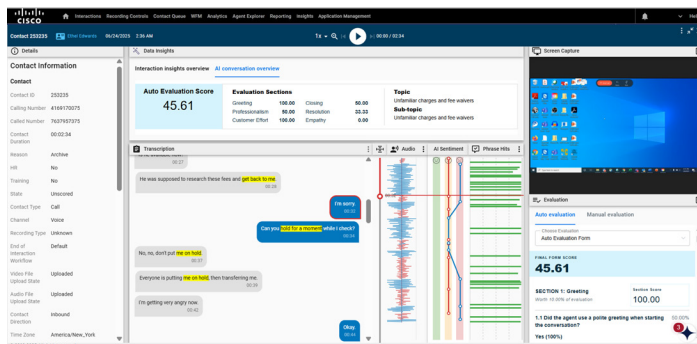


Figure 6. AutoQM evaluates 100% of customer interactions against consistent performance criteria.

Together, Interaction Summary, Trending Topics, and Auto QM create a powerful cycle of continuous improvement. Trending Topics identifies emerging issues and hot spots across customer conversations. From there, supervisors can quickly drill into Interaction Summaries to understand the context behind the trend—without reading full transcripts. And once you've pinpointed where performance needs to improve, Auto QM enables you to scale targeted evaluations across 100% of interactions to measure, monitor, and coach with precision.

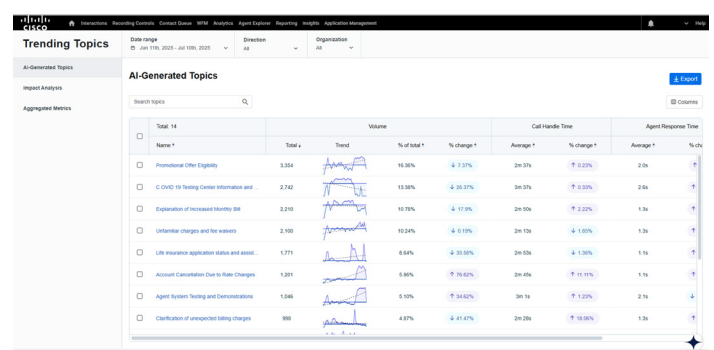


Figure 7. Trending Topics.

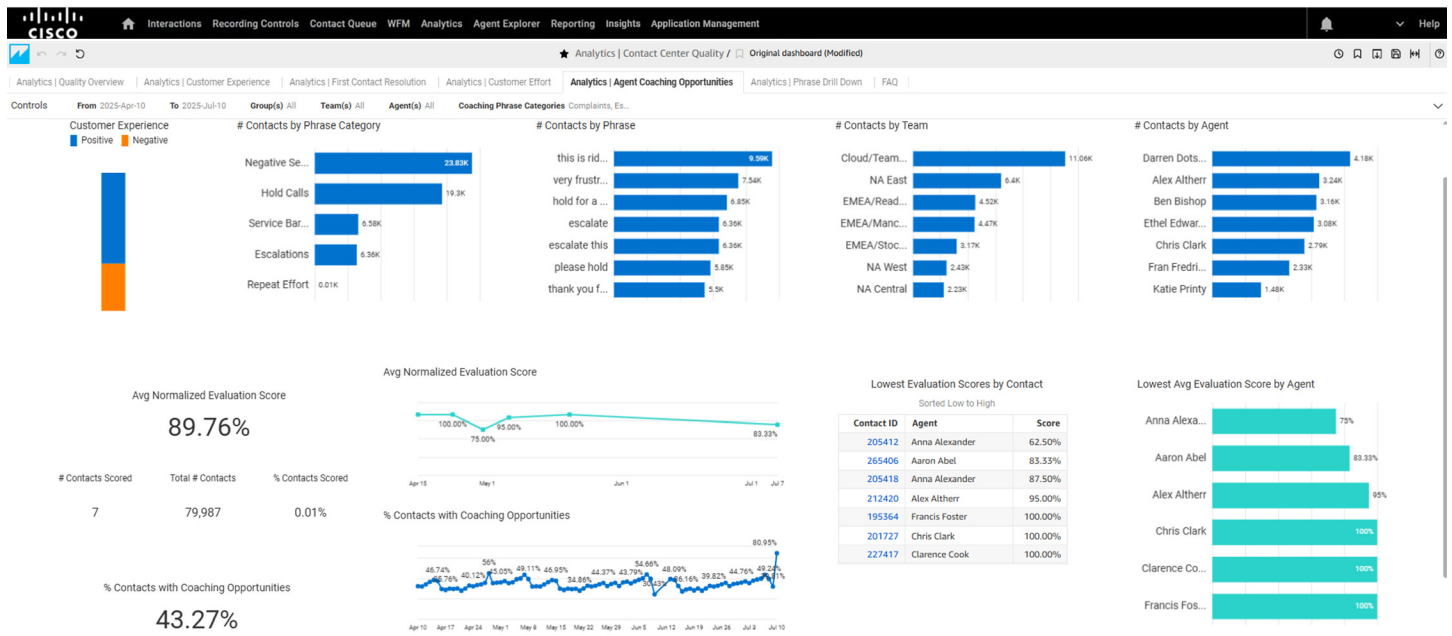


Figure 8. Insights reports and dashboards make it easy to report on the metrics you need

## Insights – AI-powered custom reporting

As part of the Webex Workforce Optimization, Insights provides blended, non-siloed reporting that enables you to seamlessly combine all your workforce management and customer interaction data from across the suite. This intuitive, self-service solution empowers you to visualize your data through actionable reports and dashboards. Experience the future of data-driven decision-making with Insights.

- **Streamlined Data Exploration** Free your team from the burden of navigating multiple applications. Integrated within the suite, Insights provides a seamless custom reporting solution for analyzing all your workforce engagement management (WEM) and interaction data instantly.
- **Empowerment Made Easy** Say goodbye to tech roadblocks. Insights enables non-tech users to create reports and dashboards independently, accelerating decision-making without IT assistance.

- **Enhanced Collaboration** Insights fosters seamless collaboration by securely sharing dashboards and information across departments, empowering your entire team to harness collective expertise for maximum impact.
- **Solve Critical Business Challenges** WEM data is the unfiltered voice of your customers and agents, delivering invaluable insights for your contact center and business. With Insights, this raw data becomes a powerful tool, empowering you to address emerging issues, enhance employee engagement, retain customers, seize upsell opportunities, ensure compliance, and achieve much more.

## Localization and supported languages

To view which Localization and supported languages are compatible with Components of Workforce Optimization please [visit the following link](#).

## Ordering Information

Webex Workforce Optimization is available under Cisco's Collaboration Flex Plan. Webex WFO options can be ordered under the Additional Options tab in the A-FLEX-3-CC offer in the Cisco Commerce Workspace (CCW) tool. Each option that is selected will add the uncommitted SKU to the order. Any committed quantities selected will be added to the order as well. Note that all Webex WFO orders will include uncommitted storage.

Workforce Optimization (WFO) Options

- ☐ WFO Bundle
- ☐ Quality Management
- ☐ Quality Management Basic
- ☐ Workforce Management
- ☐ Workforce Management Basic
- ☐ WFO Analytics
- ☐ WFO Analytics with Transcription
- ☐ Enterprise Analytics
- ☐ Enterprise Analytics 100 Interactions Addon
- ☐ WFO Storage
- ☐ WFO Call Recording
- ☐ WFO Insights

Refer to the Cisco Collaboration Flex Plan Contact Center data sheet and the Cisco Collaboration Flex Plan Contact Center ordering guide for complete ordering details.

To place an order, contact your local Cisco certified partner or Cisco sales agent. If you need help finding a partner in your area, use the Partner Locator tool. Your partner or Cisco sales agent can also assist with any modifications to your subscription after your initial order is placed.

## Cisco Collaboration Flex Plan

### Flex up on the cloud momentum

If your business needs a more intuitive way to work and a more predictable financial path to the cloud, talk to your Cisco representative about the Cisco Collaboration Flex Plan. The Cisco Collaboration Flex Plan gives businesses an intelligent and practical path for taking their business from on-premises to cloud communications and collaboration at their own pace, with an award-winning user experience at every step.

You can buy meeting, team collaboration, calling, and contact center services for all employees, or simply purchase what you need today and grow at your own pace. With the Flex Plan, one agreement includes software, upgrades, and support.

The Collaboration Flex Plan offers several important benefits:

- Full collaboration suite – Access a full-stack, enterprise-grade cloud collaboration bundle that includes everything a business needs—cloud calling, meetings, team collaboration, contact center, and a broad portfolio of integrated devices.
- Single OpEx subscription – Remove the need for hefty upfront capital investments and replace them with predictable monthly fees. Consolidate technology roadmaps and vendor relationships (license management, billing, support).
- Secure and reliable cloud service and implementation, supported by certified Cisco enterprise channel partners.
- Flexibility – Support a mix of on-premises and cloud system deployments, with financial protection for future migration of any included Cisco on-premises licenses.
- Built to support multisite and global multi-national networking requirements.
- Intelligent user experience – Integrate customer collaboration applications and devices with other cloud applications you depend on, so you can streamline workflows and support a more intuitive way to work.



# Cisco and partner services

Adapt to market changes while increasing productivity, improving competitive advantage, and delivering a rich media experience across any workspace. The combined strengths of Cisco and our partners provide a portfolio of services that can help you prepare your infrastructure for future changes aligning to long-term business goals. Together, we create innovative, network-centric architecture solutions resulting in a scalable and responsive foundation that can help you realize the full value of your IT and communication investment.

For more information, please visit [Cisco Contact Center Services](#).

# Cisco environmental sustainability

Information about Cisco’s environmental sustainability policies and initiatives for our products, solutions, operations, and extended operations or supply chain is provided in the “Environment Sustainability” section of Cisco’s Corporate Social Responsibility (CSR) Report.

Reference links to information about key environmental sustainability topics (mentioned in the “Environment Sustainability” section of the CSR Report) are provided in the following table:

Table 2. Sustainability topics

TOPIC	REFERENCE
Information in product material content laws and regulations	Materials
Information on electronic waste laws and regulations, including products, batteries, and packaging	WEEE compliance

Cisco makes the packaging data available for informational purposes only. It may not reflect the most current legal developments, and Cisco does not represent, warrant, or guarantee that it is complete, accurate, or up to date. This information is subject to change without notice.

# Cisco Capital

## Flexible payment solutions to help you achieve your objectives

Cisco Capital makes it easier to get the right technology to achieve your objectives, enable business transformation and help you stay competitive. We can help you reduce the total cost of ownership, conserve capital, and accelerate growth. In more than 100 countries, our flexible payment solutions can help you acquire hardware, software, services and complementary third-party equipment in easy, predictable payments.

# For more information

For more information, please visit the following:

- [Webex Contact Center](#)
- [Webex Contact Center Enterprise](#)
- [Unified Contact Center Enterprise](#)
- [Unified Contact Center Express](#)

Table 3. Document history

NEW OR REVISED TOPIC	DESCRIBED AS	DATE
General Updates	N/A	May 2, 2023
New WFM off and platform integration	N/A	July 26, 2021
First publication of new data sheet	N/A	June 23, 2020



**For more information**  
Please visit [webex.com/contact-center](https://webex.com/contact-center)

June 2025