

# Cisco Unified Workforce Optimization for Cisco Unified Contact Center Express 9.0

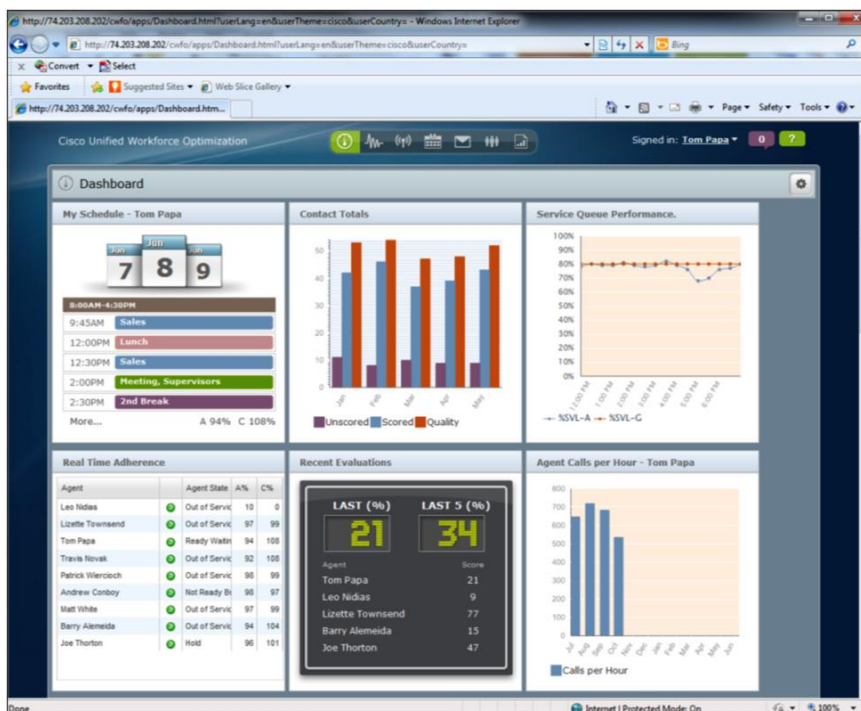
Cisco® Unified Communications Solutions unify voice, video, data, and mobile applications on fixed and mobile networks, enabling easy collaboration every time from any workspace.

## 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 transforms the supervisor experience, giving supervisors access to more data and more powerful tools in simplified and flexible views (Figure 1) so they are better equipped to lead their teams in delivering exceptional customer experiences.

**Figure 1.** Cisco Unified Workforce Optimization Personalized Performance Dashboard



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Cisco Unified Workforce Optimization empowers supervisors with information in real time and gives them the tools they need to evaluate and continually improve team performance and customer satisfaction. The suite design is based on a powerful Web 2.0 framework, drawing on navigation and workflow techniques proven by the social web, to deliver a set of personalized applications that are intuitive, flexible, and simple to support.

## Features and Benefits

Cisco Unified Workforce Optimization applications include Call Recording and Quality Management and Workforce Management software.

Cisco Unified Workforce Optimization Call Recording and 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.

Call Recording enables recording of contact center agents and other IP telephony users to meet compliance requirements or verification of business processes. At the same time, Quality Management helps monitor and measure the contact center's contribution to overall business objectives. In addition, Call Recording and Quality Management:

- Improves agent knowledge through evaluations and feedback
- Helps ensure customer satisfaction and loyalty
- Improves business process and performance
- Increases revenue and profitability
- Helps resolve disputes quickly and accurately

Cisco Unified Workforce Optimization Workforce Management allows contact centers to manage their human capital resources. Managers can develop schedules for multiple sites, manage critical data and key performance indicators (KPIs), and manage real-time adherence of agents to their schedules. In addition, Workforce Management:

- Provides consistent customer service levels and manages employee adherence
- Improves customer loyalty and increases revenue
- Delivers more efficient staff usage through effective scheduling
- Empowers agents to view their own performance metrics and self-serve for schedule requests
- Improves contact quality by pinpointing the need for training and maintaining or reducing labor costs

## Call Recording and Quality Management

The Call Recording and Quality Management component (Figure 2) of Cisco Unified 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 and Quality Management is available with any mix of the three user license types:

- 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 call recording, quality evaluations, performance dashboard, and reports
- Advanced Quality Management: Includes all of the Quality Management functions plus screen recording during and after calls

**Figure 2.** Cisco Unified Workforce Optimization Quality Management Contact Player



Key features include:

- Voice and screen recording
- Live voice monitoring
- Workflow-based contact recording
- Configurable quality evaluation forms including mixed yes/no or 0-5 answer types, section- and question-level weighting, and unlimited number of sections and questions
- Easy categorization and feedback mechanisms
- Up to 10 custom metadata fields, providing the ability to append important enterprise and customer data to recordings for easy search and retrieval
- The ability to control recording for manual start, pause, and add metadata through Cisco Agent Desktop or Calabrio recording control browser or IP phone applications
- The ability to export calls in bulk for compliance and transaction verification through the Calabrio Recording Export application
- 100-percent voice recording for compliance and transaction verification
- Knowledge worker recording

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- The ability to evaluate, score, and report on the quality of customer interactions through any channel (chat, email, social media, etc.)
  - Evaluation calibration capabilities, enabling contact center managers to benchmark evaluators
  - Clear configurable and graphical reports
  - Role-based alerts to streamline evaluation workflows
  - Search capabilities that let you locate recorded calls quickly and easily
  - The ability to record exported files in .wav or Windows media formats
  - Flexible, reliable architecture (desktop-, server-, or network-based, or any combination)
  - Web 2.0-based framework and user interface
  - Ease of implementation and use
  - Payment Card Industry (PCI) data security compliance
  - System monitoring and notification utility that can alert through email or through existing Simple Network Management Protocol (SNMP)-based network monitoring solutions; also can match recording events to Call Detail Records (CDR)

The Call Recording and Quality Management software supports four recording methods:

- Desktop recording: Software recording service executed on the recorded user's PC
- Server recording: Uses monitoring and recording services running on a server connected to a Switched Port Analyzer (SPAN) port on the switch interconnecting the phones; the switch SPAN port replicates the phone ports IP packets and forwards them to the monitoring service for possible recording based upon computer telephony integration (CTI) events and the configured workflow
- 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 and controlled by the recording workflow on the recording server processing the user's CTI events
- Cisco MediaSense Recording: Records through the Cisco MediaSense product and then transcodes, encrypts, and uploads into the Call Recording and Quality Management system per the user's workflow configuration

Cisco Unified 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
- Agent hot desking or hoteling and extension mobility for nonagents, which frees a user from having to work at a particular location or on a particular device

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For all recording types, 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

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

## 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 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.

Key features include:

- Forecasting and scheduling
- Real-time adherence management
- Agent access to schedules and shift trades
- Multiskill agent queuing
- 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
- Project scheduling
- 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)

The Workforce Management component (Figure 3) 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 3.** Workforce Management Agent Schedule View



## System Requirements

### Server Requirements

Table 1 gives the server requirements for monitor and recording services based on the number of users.

**Table 1.** Server Requirements for Monitoring and Recording Services for Cisco Unified Workforce Optimization Quality Management

Monitoring and Recording Services Server Capacities			Cisco UCS® Servers Only for Cisco Quality Management and Workforce Management	
<b>Processor</b>	Intel 5140 Xeon 2.33-GHz	2 Intel 5140 Xeon 2.33-GHz	2 (minimum Nehalem class CPU)	4 (minimum Nehalem class CPU)
<b>Memory</b>	4 GB	4 GB	4 GB	4 GB
<b>System storage</b>	40 GB	40 GB	40 GB	40 GB
<b>Recording storage</b>	Varies by usage	Varies by usage	Varies by usage	Varies by usage
<b>Cisco Media Convergence Server (MCS) equivalent</b>	Cisco MCS 7835	Cisco MCS 7845	Cisco UCS OVA	Cisco UCS OVA

Monitoring and Recording Services Server Capacities			Cisco UCS <sup>®</sup> Servers Only for Cisco Quality Management and Workforce Management	
<b>Single-Server Configuration with Co-resident Server or Network Recordings</b>				
Maximum number of named users	1500	3600	3600	
Maximum number of concurrent agents or users	500	1200 <sup>1</sup>	1200 <sup>1</sup>	
Co-resident server-based recording, voice only	70	100		
Co-resident server-based recording, voice and screen	35	50		
<b>External Server (SPAN) and Network Recording Capacities, in Concurrent Recorded Calls</b>				
Voice-only recording service	200 <sup>2</sup>	300 <sup>2</sup>		300 <sup>2</sup>
Voice and screen recording service	100 <sup>2</sup>	150 <sup>2</sup>		150 <sup>2</sup>
Server (SPAN) monitoring service	130	200		

<sup>1</sup> Concurrent user counts greater than 500 require a separate, external server to host MS SQL; for concurrent user counts greater than 1000, the MS SQL server must have 8 GB and be 64-bit.

<sup>2</sup> Server and network recording servers require 0.5 GB for voice or 1.0 GB for voice and screen storage capacity per recorded user for caching daily recordings.

<sup>3</sup> Server (SPAN) monitor server is not supported on the Cisco UCS platform.

Table 2 lists the application server requirements for Cisco Unified Workforce Optimization Workforce Management Server.

**Table 2.** Application Server Requirements for Cisco Unified Workforce Optimization Workforce Management Server

Workforce Management Server Capacities			
Processor	Intel 5140 Xeon 2.33-GHz	2 Intel 5140 Xeon 2.33-GHz	2 Nehalem class CPUs
Memory	2 GB	4 GB	2 GB
System storage	40 GB	40 GB	40 GB
Cisco MCS equivalent	Cisco MCS 7835	Cisco MCS 7845	Cisco UCS OVA
<b>Workforce Management: Single-Server Configuration</b>			
Maximum number of named users	450	900	900
Maximum number of concurrent agents users	150	300	300

The application server software requirements for Cisco Unified Workforce Optimization Workforce Management, Call Recording, and Quality Management include the following:

- Operating system options:
  - Windows Server 2008, 32- or 64-bit
  - Windows Server 2003 R2
- Database options:
  - Microsoft SQL Server 2008 Express, Standard, or Enterprise Edition based on number of recordings
  - Microsoft SQL Server 2005
- Hosting options:
  - Physical server
  - Virtual server using VMware ESX or ESXi Server

## Quality Management PC Requirements

Table 3 outlines PC requirements for the Quality Management component of Cisco Unified Workforce Optimization.

**Table 3.** Call Recording and Quality Management Minimum Client Requirements

Component	Processor GHz		Memory GB		Free Disk Space GB	
	XP	Windows 7 or Vista	XP	Windows 7 or Vista		
Call recording and quality applications	1.0	1.0	2	2	1	
Desktop voice recording	0.5	1.0	0.256	2.000	1.0	
Applications plus desktop voice recording (Call Recording or Quality Management)	1.0	1.0	0.256	2.000	1.0	
Applications plus screen recording (Advanced Quality Management)	1.4	2.0	1.000	2.000	1.0	

## Ordering Information

Cisco field and partners can consult the ordering guide for a full list of part numbers and detailed ordering instructions:

[http://www.cisco.com/web/partners/downloads/partner/WWChannels/technology/ipc/downloads/CCBU\\_ordering\\_guide.pdf](http://www.cisco.com/web/partners/downloads/partner/WWChannels/technology/ipc/downloads/CCBU_ordering_guide.pdf).

## Cisco 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 can create innovative, network-centric architecture solutions that result in a scalable and responsive foundation that can help you realize the full value of your IT and communication investment.

For more information about Cisco Unified Contact Center Services, please visit <http://www.cisco.com/go/uccservices>.

## For More Information

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



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