Webex Experience Management Integration

Experience Management Overview

Cisco Webex Experience Management is a Customer Experience Management (CEM) platform that allows you to see your business from your customers' perspective. To know more about Webex Expereince 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.

Experience Management Survey

Experience Management post-call survey is used to determine whether the customers are satisfied with their voice call experiences. You can configure Experience Management to initiate this survey when an agent disconnects from the caller. The survey can be done in three modes—voice, SMS, or email.

The CCE script enables or disables voice call survey for each call by testing for conditions and setting an expanded call variable that controls Experience Management. For example, the script can invoke a prompt

that asks callers whether they want to participate in a survey. Based on the caller's response, the script sets the expanded call variable that controls whether the call gets transferred to the voice call survey Dialed Number.

You can send post call survey links through email or SMS also. After every call, the customer is provided with a choice to participate in the survey and answer few questions over email or their phone. For more information on how to configure or to associate the survey, refer to the section Configure Unified CCE for Experience Management Voice, SMS and Email Survey, on page 5 .

Note Experience Management supports G.711 u-law and G.711 a-law codecs.

Experience Management Task Flow

To enable Experience Management Post Call Survey in Cisco Unified CCE, follow this task flow:

Procedure

Step 1 Contact your Cisco representative to purchase Experience Management license. After the purchase, you need to 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:

    a. Creates accounts and provisions the same.

    b. Creates default spaces and metric groups for your accounts. To know more about creating spaces, see Space Creation.

    c. Creates standard questionnaires for Experience Management Post Call Survey and publishes the same. To know more about creating questionnaires, 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, how to export and derive meaningful insights from them, see Experience Management Gadgets.

To know how to configure additional Widgets in Experience Management, see Experience Management Gadgets.

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 Experience Management Service on Cloud Connect, on page 3.

Step 7 Configure Cloud Connect in Operations Console (NOAMP). For details see the section *Configure CVP Devices for Cloud Connect* in *Administration Guide for Cisco Unified Customer Voice Portal* at https://www.cisco.com/

c/en/us/support/customer-collaboration/unified-customer-voice-portal/ products-installation-and-configuration-guides-list.html.

Step 8 Configure Post Call Survey in CVP. For more information, see Configure Post Call Survey in CVP.

Step 9 Import the following certificates to the CVP Server:

- Cloud Connect certificate

- Experience Management certificate

For details, see the sections *Import Cloud Connect Certificate to Unified CVP Keystore* and *Import Experience Management Certificate to Unified CVP Call Server* in *Configuration Guide for Cisco Unified Customer Voice Portal* at https://www.cisco.com/c/en/us/support/customer-collaboration/unified-customer-voice-portal/ products-installation-and-configuration-guides-list.html.

Step 10 Ensure that the threshold properties (in *ivr.properties* and *sip.properties* files) and proxy settings are configured in CVP for Experience Management. For details, see the section *Webex Experience Management Configuration* in *Configuration Guide for Cisco Unified Customer Voice Portal* at https://www.cisco.com/c/en/us/support/ customer-collaboration/unified-customer-voice-portal/products-installation-and-configuration-guides-list.html.

Step 11 Configure Unified CCE Experience Management. For more information, see the topic Configure Unified CCE for Experience Management Voice, SMS and Email Survey, on page 5.

Step 12 Configure Dialed Number and Call Type for Incoming Call and Experience Management post call survey routing script. For more information, see Configure Dialed Number and Call Type, on page 7.

Step 13 Modify CCE scripts. For more information, see *Modify CCE Scripts for Experience Management Voice, SMS and Email 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 14 Provision Cloud Connect on Cisco Finesse. For more information, see the *Cloud Connect Server Settings* topic at the *Cisco Finesse Administration Guide*.

Step 15 Add Experience Management gadgets into Finesse desktop layout. For more information, see Cisco Webex Experience Management Gadgets.

Provision Experience Management Service on Cloud Connect

Before provisioning Experience Management service on Cloud Connect, 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*

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*.

The partner hosted module which is a part of Experience Management Invitations solution is required to send surveys to customers over emails and SMS.

For information about *Partner Hosted Module Architecture* refer to https://xm.webex.com/docs/cxsetup/guides/partnerarchitecture/

For information about how to provision the infrastructure required to deploy the partner hosted components of the Experience Management Invitations module, see https://xm.webex.com/docs/cxsetup/guides/partnerinfra/.

For information about how to deploy the partner hosted components on the Experience Management Invitations module once the infrastructure is provisioned, see https://xm.webex.com/docs/cxsetup/guides/partnerdeployment/.

Configuration Changes in Webex Experience Management

Any configuration changes done in the Webex Experience Management administration interface gets reflected in the on-premise Contact Center integrations after a maximum caching delay.

You observe the caching delay when:

- Modify the questionnaires.

    - Adding or removing questions.

    - Adding new stock prefill question.

    - Updating the tags associated with stock prefill questions. The specific tags that Contact Center integrations use.

- System configuration changes are made to the dispatch.

The maximum caching delay depends on the kind of configuration change. Because the on-premise systems cache, Webex Experience Management configuration, and the maximum delay depend on the cache invalidation period. In cache invalidation, the system invalidates or removes the data from the cache after a specific time interval.

Types of Caches and Cache Invalidation

The different types of caches that are used in the on-premise systems are:

- **Prefill Cache** if any new tag is not in the cache it's updated. However, if any new questions get added with the tag it reflects only after a cache invalidation period of 24 hours. For example, `tag -> List of Questions`.

> **Note**   As the new questions are staff prefill questions, we do not expect it to change often. Hence a delay of 24 hours is acceptable.

- **All other caches** will be reflected after a cache invalidation period of 1 hour. For example, `questionnaire -> hashScheme dispatchTemplate -> questionnaireDispatchSettings (As obtained from settings API)`

The partner hosted module in the Experience Management Invitations solution maintains a cache with maximum delay of 1 hour for the Dispatches list, Settings, Delivery Policy, Active Questions, and Questionnaire APIs. For more information, see https://xm.webex.com/docs/cxsetup/guides/partnerarchitecture/#43-caching-mechanism.

Configure Unified CCE for Experience Management Voice, SMS and Email Survey

Refer to the following procedures to enable the Experience Management voice, SMS and email survey:

Configure Expanded Call Variables

Procedure

Step 1 In the **Configuration Manager** menu, select **Tools** > **List Tools** > **Expanded Call Variables List**. The **Expanded Call Variables 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, the Post Call Survey field is **enabled** by default even if *user.microapp.isPostCallSurvey* has not yet been set in the script. 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 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 the **Max Length** to 133 for Type 10 VRUs. For all other routing clients, 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. |

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

For more information on populating this variable, refer to the topic Configure POD.ID.

Step 7 Restart the active VRU PG (side A or B) to register the new ECC variable.

If the ECC variable already exists, you can skip this step.

| Note | The **user.microapp.isPostCallSurvey** setting takes effect on Unified CVP only when it receives a **connect** or temporary connect message. If you do not want the survey to run, without first reaching an agent (such as 'after hours of treatment'), set the isPostCallSurvey to **n** before the initial 'Run script request'. |

Configure POD.ID

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

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 seperated with a semi-colon. 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 caller for Email surveys	Email survey for voice channel
Mobile	Phone number for SMS surveys	SMS survey for voice channel
cc_language	Language of the survey For the list of supported languages, refer to the Webex Experience Management documentation at https://xm.webex.com/docs/user/getting-help/#cloudcherry-language-support	Email, SMS, and Voice surveys for voice channel
Optin	Whether to opt in or opt out of the survey	Email, SMS, and Voice surveys for voice channel

Example: `cc_CustomerId=xxx;Email=xx;Mobile=xxx;cc_langauge=xxx;Optin=yes/no`

For more information on **Expanded Call Context Variables**, see the chapter *Configure 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.

You can also configure POD.ID from CVP Call Studio. For more information, refer to the topic *Configure Call Studio App Data Format* in the 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.

Upload Audio Files for Questions in Experience Management

Experience Management allows you to upload the audio files for post call survey.

> **Note**   To run post-call voice survey, you must either configure *Text-To-Speech(TTS)* in the voice browser or upload audio prompts in Experience Management.

Create and configure the questionnaires in Experience Management for sending IVR surveys to the customer. For more information on Experience Management, refer to https://xm.webex.com/docs/ccoverview/

For more information on how to create and modify the questionnaires, refer to https://xm.webex.com/docs/cxsetup/questionnaires/.

Configure Dialed Number and Call Type

Procedure

Step 1   In **Configuration Manager**, navigate to **Tools** > **List Tools** > **DialedNumber/Script Selector List**.

Step 2   In **DialedNumber/Script Selector List** create **Incoming Dialed Number** and **Post Call Survey Dialed Number**.

For more information on how to create a PCS Dialed Number, refer to the section *Configure ICM for Post Call Survey* in *Configuration Guide for Cisco Unified Customer Voice Portal* at https://www.cisco.com/c/en/us/support/customer-collaboration/unified-customer-voice-portal/products-installation-and-configuration-guides-list.html.

Step 3   Click **Save**. You will be re-directed to the **Configuration Manager** window.

Step 4   In **Configuration Manager**, navigate to **Tools** > **List Tools** >**Call Type List**.

Step 5   In **Call Type List** create the **Call Type**. You should associate to the incoming call script and PCS script.

You should associate the incoming call type with the survey from CCEAdmin.

For more information, refer to the topic .

Associate Survey to Call Type in Unified CCE Admin

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

> **Note** Only one survey can be associated to a Call Type.

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

Procedure

Step 1 In **Unified CCE Administration**, navigate to **Overview** > **Call Settings** > **Route Settings** > **Call Types**.

The list of all the **Call Types** are displayed.

For more information on Call Types, refer to the **Help** in **ConfigManager** > **List Tools** > **Call Types**.

Step 2 Click on the **Call Type** which you want to associate to the Survey. Associate the survey with the last call type before the call is first connected to an agent.

Step 3 Select the **Enable Experience Management** check box to associate the **Webex Experience Management** survey.

The **Experience Management** tab is enabled with the following options:

- **Inline Survey** (post-call voice survey)

- **Deferred Survey** (post-call Email and SMS survey)

Step 4 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**.