

# PerformanceEdge® Quality Management Desktop Integrator

**Your contact center is under pressure to meet rising consumer demands and simultaneously contribute to the overarching goals of the enterprise. Your quality management application is helping your center to meet its objectives, but extending the scope of these capabilities to other business applications accessed by your agents would give you new insight into overall agent performance and efficiency of workflows and business processes, enabling your center to better achieve its operational and customer satisfaction targets.**

The quality management capability of PerformanceEdge integrates with OpenSpan to provide Smart Agent, a desktop monitoring tool that enhances the recording and tagging functionality of every customer interaction. By extending PerformanceEdge® Quality Management functionality to record all back office interactions with applications, such as customer relationship management (CRM) systems, email or other in-house developed systems, Smart Agent enables you to gain insight into overall agent performance so you can identify areas for improvement and make immediate adjustments to enhance the complete customer experience.

## What Does It Do?

Smart Agent works with PerformanceEdge Quality Management to deliver advanced call tagging and the ability to start, stop, pause and resume recordings based on agent desktop activity. It enables you to accomplish the following without requiring incremental programming:

- Increase the number of options for categorizing customer interactions;
- Accelerate access to recordings during searches;
- Tie together related interactions to provide a full history of a customer's interactions; and,
- Record or tag back-office interactions based on simple-to-create workflow triggers for any employee in the enterprise that uses applications, such as CRM systems, email, or Web chat.

## How it Works

Smart Agent delivers events, notifications, and data elements to PerformanceEdge Quality Management to trigger various recording functions. As a result, contact centers can trigger screen capture when agents click on specific buttons or insert data into fields within various productivity applications. Call recordings can also be tagged with information derived from certain fields.

**Email interaction recording** - an automated recording message is set to start when an agent opens an email and stop when the agent hits the send button, enabling you to secure screen captures while an agent is writing an email.



## Highlights

- Increased visibility into overall agent performance.
- Improved customer interactions.
- Simplified regulatory compliance.
- Enhanced workflow processes.
- Increased agent efficiency.
- Improved quality levels in multichannel and back-office environments.

## Key Benefits

- Tag recordings with key application data.
- Record email, Web chat or back office screens.
- Utilize start, stop, pause and resume recording capabilities to categorize interactions and access recordings during searches.
- Tie related interactions together to give agents comprehensive insight into customer history.
- Gain complete insight into customer interactions from start to end.
- Record on-demand from the supervisor desktop.
- Add customer Web survey data and triggers.



**Call interaction recording when customer information is revealed during call** - a recording is tagged when the agent fills in the "Gold Customer" in a field in a CRM application, allowing you to pay particular attention to the Gold Customer recordings to ensure superior customer service for your most valuable customers.

**Call tagging** - a recording is tagged for each customer that has been flagged as an "upset customer" in the CRM system. A message is automatically sent to PerformanceEdge® Quality Management to tag the recording when an agent selects the "upset customer" option. This enables managers and supervisors to identify areas where additional coaching or training may be required or to develop new processes or procedures.

**Protecting secure information** - a recording can be paused when sensitive information, such as a credit card number is being revealed by the customer to the agent, and then subsequently resumed when the agent has moved on to a different field on their screen. This can be accomplished for audio plus screens or screen only recording depending on requirements.

### Features and Enhancements

Smart Agent provides a configurable interface for each of the following PerformanceEdge Quality Management features or enhancements:

**Start Recording** - start recording audio or screens based on various desktop events and triggers.

**Stop Recording** - stop audio or screen recording based on various desktop events and triggers.

**Pause Recording** - pause audio or screen recording based on various desktop events and triggers; may be useful for environments where PCI compliance is important, and secure information cannot be captured or available for playback.

**Resume Recording** - resume audio or screen recording based on various desktop events and triggers.

**Advanced Tagging** - capture various call metadata from applications, such as CRM, and store it with the recorded file; can be used for customer searching or rule creation.

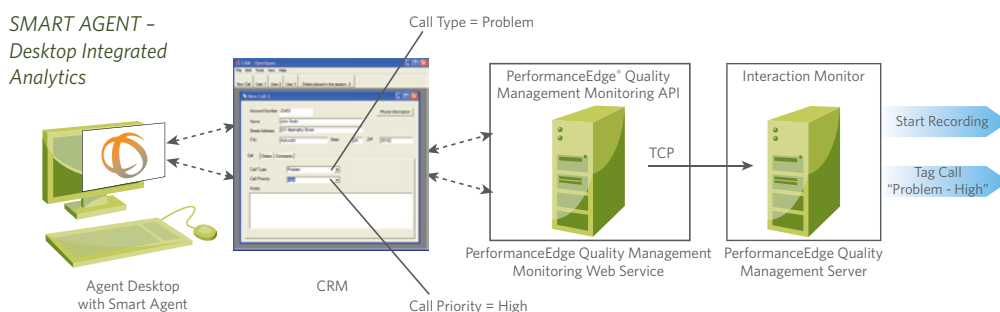
**Back-office/Screen Only Recording** - record screens without audio; capture back-office information outside of the contact center environment

**Enhanced CMQ Web Survey** - add customer web survey data and triggers to collect information such as email address or customer ID not captured via IVR.

**Enhanced Speech Analytics** - update the Speech Analytics application with various call metadata.

**Supervisor On-Demand Recording** - provide enhanced functionality for supervisors to record interactions on-demand as needed.

Smart Agent from OpenSpan is more than just screen-scraping technology. It is a sophisticated architecture that enables an integration with the operating system of the client in order to perform advanced desktop integrator functionality and analytics. This helps companies gain insight into overall agent performance and create actionable plans to improve the customer experience they deliver and evaluate company performance.



### PerformanceEdge® Group

The PerformanceEdge Group is a dedicated resource within the Aspect organization that is comprised of contact center performance professionals with technical, process and application subject matter expertise.

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### About Aspect

Aspect provides software and consulting services that turn the potential of unified communications into real business results across the enterprise and in the contact center. Applying 35 years of insight and experience, Aspect helps more than two-thirds of the FORTUNE Global 100, as well as small and medium enterprises, power their business processes with communications. For more information, visit [www.aspect.com](http://www.aspect.com).

