



# Discover

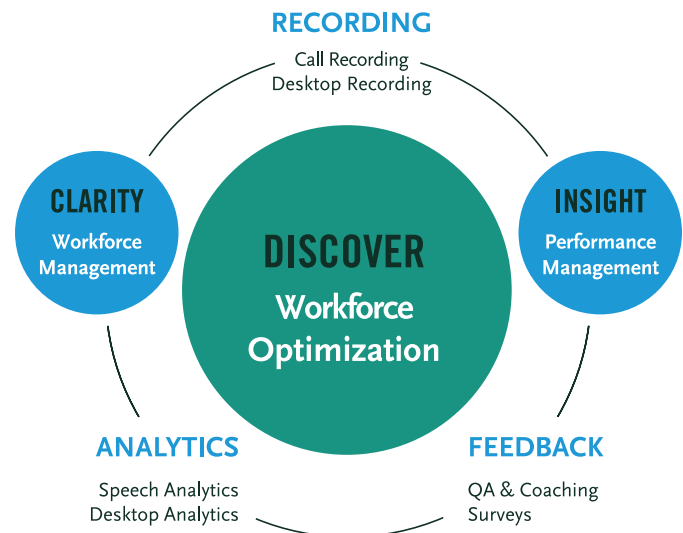
Workforce Optimization Suite

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**PRODUCT OVERVIEW**

To excel in today's challenging economic environment, organizations need state-of-the-art solutions to better serve customers, achieve maximum efficiency, manage risk and stay compliant with regulations.

Uptivity helps organizations accomplish their missions with the Uptivity Discover Suite, a unified workforce optimization (WFO) solution that delivers efficiency and productivity gains. With Discover's visibility into operations, you can manage your customers' experiences much more effectively for a competitive advantage.



DMG Consulting's 2013 WFO Market Report rated Uptivity #1 in Overall Vendor Satisfaction.

## IMPROVE CUSTOMER SATISFACTION

- Analyze interactions for opportunities to improve.
- Schedule agents to best serve customer needs.
- Coach agents on interaction best practices.
- Manage service delivery to meet satisfaction goals.

## MAXIMIZE EFFICIENCY

- Evaluate agent adherence to organizational standards.
- Increase agent satisfaction and productivity.
- Analyze desktop activity for quality assurance.
- Minimize overhead, over-staffing and overtime costs.

## ACHIEVE COMPLIANCE

- Comply with PCI, FDCPA, HIPAA, MIPPA, TCPA and more.
- Adhere to regulations for audits, record retention and privacy.
- Mitigate litigation risk by having complete, accurate records.

## OUTSMART THE COMPETITION

- Use survey insights to improve the customer experience.
- Capture voice of the customer to increase satisfaction.
- Analyze interactions to detect new perceptions and trends.
- Understand brand loyalty to guide product management.
- Gain actionable intelligence with our ad hoc reporting engine.

# Call Recording

Uptivity Call Recording is a flexible, reliable system, configurable to your organization's unique requirements. Flexible scheduling supports 100%, random, event-driven or on-demand recording.

**Use advanced search** to quickly locate and play back calls.

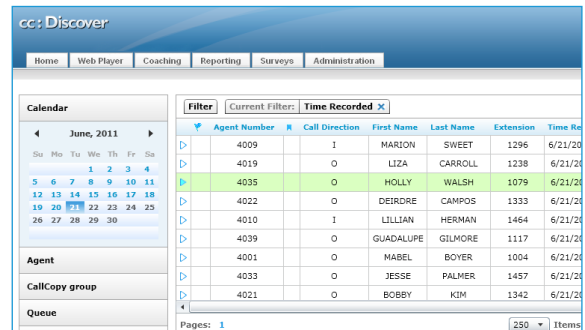
**Create schedules** to customize recording for specific needs and rankings, ensuring high-priority calls get the attention they need.

**Archive recordings** short-term or indefinitely to comply with policies and regulations.

**Synchronized desktop recording** plays back audio and video simultaneously to identify workflow issues and opportunities to improve customer satisfaction.

**Block recording** on specific call profiles or create recording rules based on call direction, ANI, DNIS or VDN.

**Automatic blackout** functionality for regulatory compliance.



Agent Number	Call Direction	First Name	Last Name	Extension	Time Recorded
4009	I	MARION	SWEET	1296	6/21/20
4019	O	LIZA	CARROLL	1238	6/21/20
4035	O	HOLLY	WALSH	1079	6/21/20
4022	O	DEIRDRE	CAMPOS	1333	6/21/20
4010	I	LILLIAN	HERMAN	1464	6/21/20
4039	O	GUADALUPE	GILMORE	1117	6/21/20
4001	O	MABEL	BOYER	1004	6/21/20
4033	O	JESSE	PALMER	1457	6/21/20
4021	O	BOBBY	KIM	1342	6/21/20

Uptivity's designers applied their contact center expertise to Discover's browser-based interface so it is intuitively easy to use.

# Quality Management

Quality Management enables you to maintain the highest level of service quality without sacrificing time or resources. Use performance assessments to drive agent adherence to your standards.

**Build evaluation forms** with a flexible interface that supports unlimited forms, sections, questions and responses.

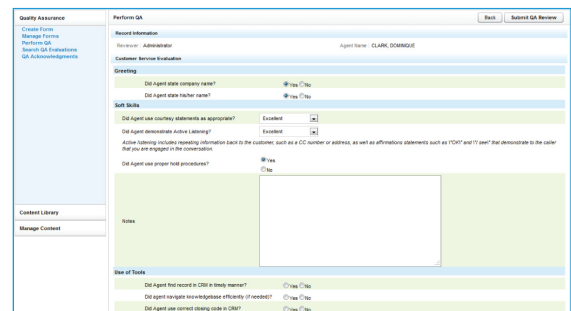
**Play back synchronized call and desktop recordings** simultaneously for thorough performance scoring.

**Customize score weights** for each evaluation form section, question and response.

**Score critical elements as auto-fail** by section or the entire form with non-applicable questions factored out.

**Create detailed reports** for insights on performance data to make evaluations based on the metrics that matter most.

**Create custom reports** or use pre-built standard reports.



**Perform QA**

**Agent Information**

Reviewer: Administrator Agent Name: CLARE DOWNS

**Customer Service Evaluation**

**Greetings**

Did Agent state company name? ☐ Yes ☐ No

Did Agent state proper name? ☐ Yes ☐ No

**Sub Skills**

Did Agent demonstrate Active Listening? ☐ Excellent ☐ [X] Good ☐ Fair ☐ Poor

Did Agent demonstrate Active Listening? ☐ Excellent ☐ [X] Good ☐ Fair ☐ Poor

Did Agent use proper hold procedures? ☐ Yes ☐ No

**Use of Tools**

Did Agent find record in CRM in timely manner? ☐ Yes ☐ No

Did Agent manage investigation efficiently? ☐ Yes ☐ No

Did Agent use correct closing code in CRM? ☐ Yes ☐ No

With Quality Management, agents can perform self-assessments and review supervisor evaluations to enhance learning.

# Coaching and Training

Coaching and Training equips agents with knowledge and tools that help them better understand their strengths and weaknesses, fostering better performance, empowerment and morale.

**Receive continuous feedback** for best-practice coaching and training and self-paced learning.

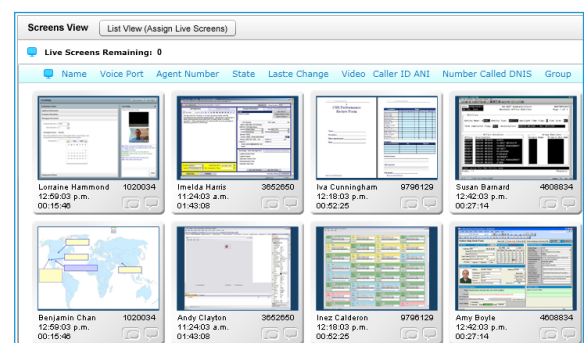
**Assign custom curricula** and training materials based on agent or group performance or role.

Maintain an **online multi-media resources library**.

**Track** completed assignments and evaluation reviews.

**Email** completed call evaluations to agents.

**Empower agents** to review and appeal performance evaluations.



Name	Voice Port	Agent Number	State	Last Change	Video	Caller ID ANI	Number Called DNIS	Group
Loraine Hammond	1020034	3652650	11:24:03 a.m.	01:43:08				
Inez Caiderson	1020034	3652650	11:24:03 a.m.	01:43:08				
Iva Cunningham	9796129	9796129	12:18:03 p.m.	00:52:25				
Susan Barnard	4608834	4608834	12:42:03 p.m.	00:27:14				
Benjamin Chan	1020034	3652650	11:24:03 a.m.	01:43:08				
Andy Clayton	1020034	3652650	11:24:03 a.m.	01:43:08				
Inez Caiderson	9796129	9796129	12:18:03 p.m.	00:52:25				
Amy Boyle	4608834	4608834	12:42:03 p.m.	00:27:14				

Discover provides live monitoring of up to 12 agent desktops simultaneously to help identify agents needing assistance.

## Desktop Recording

Desktop Recording combines video with synchronized audio recordings to create a comprehensive view of your customers' contact center interactions.

### Recording:

**Full-motion video**, captured at variable bit rate on up to four monitors per agent simultaneously.

**Continue to record after-call work** when interactions end.

**Comply** with PCI, FDCPA, HIPAA, MIPPA, TCPA, TILA, TSR, SOX and SEC regulations to inform customers, record calls or black out sensitive data.

Supports **remote offices** and **work-at-home agents**.

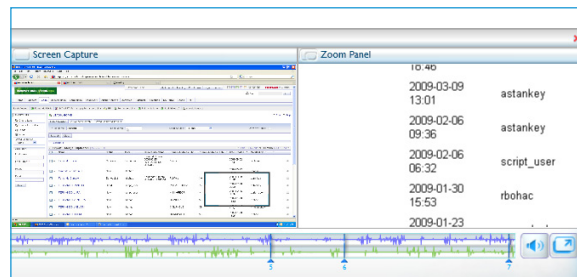
**Record email and chat sessions.**

### Playback:

**Synchronized** audio/video playback.

Click and drag to **zoom in** on areas of interest.

**Export** recordings in standard or encrypted formats.



Gain visibility into interaction and workflow activity that can reveal issues for performance and system improvement.

## Speech Analytics

Speech Analytics locates key words and phrases in recorded interactions, helping you discover new insights for improving products and services, reducing risk and increasing customer satisfaction. Use Speech Analytics to identify trends and root causes of customer perceptions.

**Spot key words and phrases**, including slang, foreign words and jargon, including references to hot issues and trends.

**Find 'best' or 'worst' examples** of handling customer inquiries for evaluation and training.

**Detect abnormal pauses** that indicate workflow issues and process improvement needs.

**Ensure accuracy** and minimize false positives by assigning probability scores to search results.

**Distinguish between caller and agent** via stereo recording.

A screenshot of a 'Web Player' interface. It displays a table with columns for 'Tags', 'Time', 'Category', and 'Value'. The table lists several interactions with tags like 'Lead Source', 'Product Interest', 'Geography', 'Script Adherence', and 'Scheduling'. The interface includes a search bar and a list of tags on the left side.

Tags	Time	Category	Value
1	00:20	Lead Source	coupon
2	00:33	Product Interest	save some money
3	01:23	Product Interest	free insulation upgr
4	02:14	Geography	pompano beach
5	05:06	Script Adherence	homeowners associat
6	05:53	Scheduling	weekend

Speech Analytics reveals root causes of customer issues and emerging trends. Use it to coach agents' script adherence.

## Desktop Analytics

Desktop Analytics extracts key data from agent desktop applications and browsers. This data is stored with the recorded interactions so they can be retrieved as needed. Use Desktop Analytics to trigger actions for workflow and regulatory requirements, and to determine training needs and reduce handling time. Sample uses include:

**Automatically pause recording** during credit card data entry to ensure sensitive authentication data is not stored.

**Verify callers' identities** before altering accounts, detecting PIN or ID entry, or marking recordings 'verified'.

**Organize recordings by patient ID number** by detecting callers' ID numbers from healthcare information systems. Calls tagged with patient IDs can be quickly retrieved.

**Tag recordings with case numbers** so help desk staff can analyze issues with multiple interactions. Recordings are easily retrieved by case number.

A screenshot of a table displaying data extracted from agent desktop applications. The table has columns for 'Score', 'CallerID (AIII)', 'Account Number', and 'User ID Verified'. The data shows various scores and account numbers, with some rows highlighted in yellow.

Score	CallerID (AIII)	Account Number	User ID Verified
-		1018465273	✓
-		0995321337	✓
93.3		1045960846	✓
33.3		1025447402	
-			

Desktop Analytics adds value by creating links between the interaction recordings and your customers' service records.

# Workforce Management

Clarity improves the customer experience and reduces operating costs by creating optimized work schedules.

**Forecast** staffing needs by skill to meet service goals and ensure optimal coverage.

**Make intraday adjustments in real time** to optimize scheduling for service levels before gaps can occur.

**Deliver live operational data** to dashboards, tablets, wallboards and mission control centers.

**Easily administer** via configurable reporting widgets and simple menus, within a unified system.

**Communicate with staff 24x7** by posting coverage requests, schedule updates and notices via social media, tablets and smart phones.

**Customize reports** to gather insights into schedule adherence for productivity improvement.

**Create 'what-if' scenarios** to plan for future events.



Clarity enables communication with your agents via social media and automates work schedule forecasting.

# Performance Management

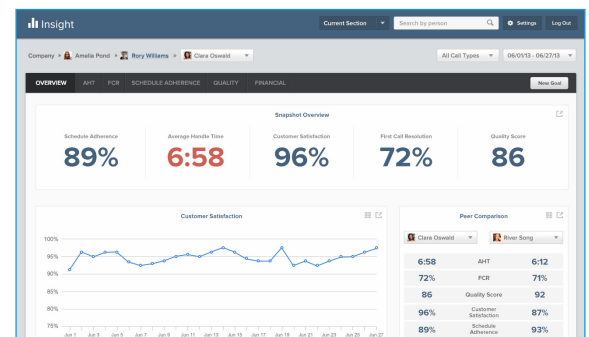
Insight provides a unified view of all contact center activity, so staff at all levels have clear and consistent views of contact center performance and can identify issues and respond appropriately, maintaining clear accountability. Insight processes data from sources across the enterprise, including call recordings, CRM, ERP, HR, SCM and WFM applications. Data is processed in the cloud and then displayed in Insight's unified dashboards to enhance the ability to quickly react to emerging trends and challenges.

Gather contact center **performance data**.

**Analyze customer interactions** via speech and desktop analytics.

Report on a **single version of the truth** in a timely fashion.

**Engage staff** through focused coaching sessions.



Insight provides views of agent and center performance that improve accountability for the customer experience.

# Surveys

Surveys enable better understanding of customers. Capture customer perspectives, gain insights into motives and preferences, identify opportunities and threats, better meet expectations and improve products and services.

**Develop** IVR-based surveys quickly and easily.

**Link post-call surveys to recordings** for calibration with customer perception.

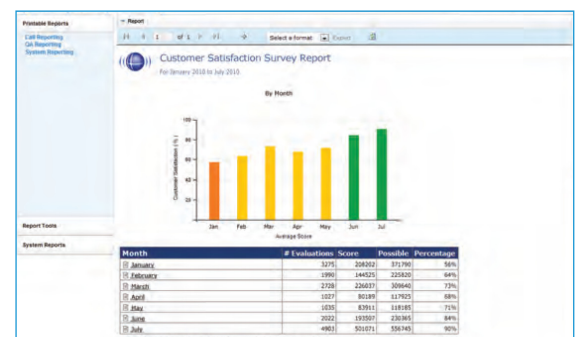
**Report** on survey completion rates.

**Analyze results** at section and question levels.

**View results** in real time via Web-based reporting.

**Filter results** by date, agent, caller or other criteria.

**Ensure privacy** through permission-based access.



Surveys collect customer perceptions that uncover opportunities to improve customer experiences, such as reducing hold time.

## Effective. Simple. Seamless.

Discover is compatible with leading PBX platforms including Avaya, Cisco, ShoreTel, Nortel, Siemens, Aspect, Alcatel, NEC and more. The system supports VoIP, TDM and blended environments, and assists in the transition from TDM to VoIP.

To scale for growth needs, combine multiple servers to create a distributed enterprise Discover solution. Analog, digital and IP handsets can be blended in a single implementation.

Server utilization is optimized to minimize footprint, while server redundancy ensures enhanced data survivability and disaster recovery.

Discover's application programming interface (API), included with all installations, provides for seamless integration with third-party applications.

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## About Uptivity

What boosts the bottom line for any company with a contact center? How about getting the best that every agent can deliver from their first day on the job and constantly optimizing contact center management and performance for a better understanding of the customer? Only Uptivity gives you the tools you need to enhance customer satisfaction and continuously improve every aspect of each step of every agent's life cycle. You get exactly what you need, thanks to a modern, integrated, and easy-to-use suite of tools that offers a unified system for performance management, workforce management, speech analytics, and call recording. Unparalleled customer service and support from our in-house staff combine with a better bundle for a better value and a lower total cost of ownership.

Headquartered in Columbus, Ohio, and on the Web at [www.uptivity.com](http://www.uptivity.com).

## Next Steps

To learn more about how Uptivity can empower your organization with its unified workforce optimization suite, please contact us:

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- [www.uptivity.com/wfo](http://www.uptivity.com/wfo)