



IEX Workforce Management Group Back Office Solutions

Powerful tools for back office data collection and analysis, enabling effective forecasting, scheduling, change management and performance management

Benefits:

- Increase efficiency and productivity for back office personnel throughout the enterprise
- Integrate with IEX TotalView to provide historical back office work volume data for forecasting and intraday management
- Measure, manage and improve KPI's through integration with Performance Manager
- Monitor for security and ensure Internet and email meets company policy guidelines
- Alert supervisors to key transactions or events such as VIP customer issues or high-value transactions

Back office operations are often out of sight, but to corporate management they are rarely out of mind. For most corporations, back offices handle the communications and fulfillment activities that keep businesses running smoothly and efficiently. Aply managing this vital asset requires building accurate forecasts and schedules that balance workload and staffing resources. It is also vital to understand and capture employee desktop activity in order to support forecasting, process and employee performance optimization.

IEX TOTALVIEW WORKFORCE MANAGEMENT

The IEX TotalView Workforce Management system, a NICE SmartCenter solution, forecasts and schedules call volumes both into and out of a contact center. And for back office operations, it provides the added functionality to manage work volume, determining the appropriate number of staff needed to perform any number of back office tasks such as efficiently processing claims, mortgage applications or prescriptions. The IEX TotalView system provides a solid foundation for accurate forecasting, planning and scheduling. For inbound and outbound contact centers, IEX TotalView connects to your ACD and/or dialer and the system extracts the data needed to build precise weekly and monthly staffing plans, while taking into account seasonal trends, marketing campaigns and historical data.

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IEX TotalView Multimedia

For back office, the IEX TotalView Multimedia advanced feature integrates forecasting, scheduling and planning to simplify service management in a multichannel environment for non-immediate work types like claims, fax and email. After creating a bi-level forecast of the contact or work item arrivals and when they should be handled, IEX TotalView creates schedules designed to ensure you have the right people covering the right work types at the right time. The system provides the flexibility for you to specify service level goals for each type of work. You can even set multiple goals within the same type of work. And with Multimedia, you can even manage the volume of backlogged work items so you can keep your service levels on target.

IEX TotalView Multiskill Scheduling

The Multimedia feature works hand-in-hand with the IEX TotalView Multiskill feature and its patented technology with embedded simulation, enabling you to realize the full potential of skills-based routing and multiskill agents. This feature understands how work items will flow to every site and how they will be delivered once they reach each location, thereby generating accurate forecasts and schedules for multiple work types to meet service level and occupancy goals. It supports skill proficiency levels, position limited skills and advanced ACD features. And if you're evaluating the costs and benefits to providing additional training to your staff, the feature will run "what-if" scenarios to give you the answers you need.

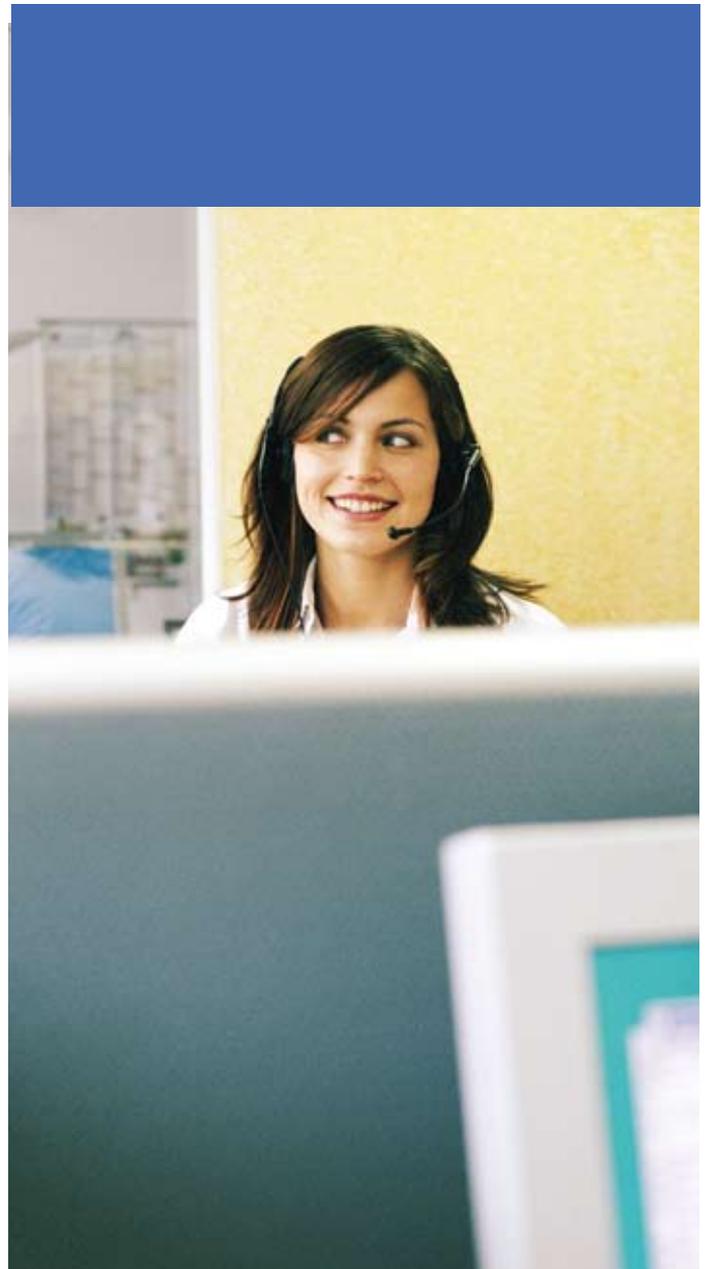
More Power, Greater Functionality

In addition to the benefits derived by integrating multiskill planning with multimedia handling, other IEX TotalView advanced features serve as valuable resources in the back office:

- WebStation provides online browser access for supervisors and workers for schedules, schedule updates, schedule reminders, schedule change requests, schedule trades, schedule bids, schedule preferences, time off management, reports and KPIs.
- Time Off Manager automates the task of PTO, vacation and holiday approval for store clerks, claims processors, and other back office personnel.
- Real-time Adherence and Historical Adherence ensure that the work you put into the plans and schedules makes a difference when workers follow the schedules.
- SmartSync Exchange automates the synchronization of data between IEX TotalView, your HR system, your workflow system, and other back office support systems.

These benefits rely on your data being stored and accessible through your work handling system. However, for back office work, oftentimes those systems do not track the number of work items and/or the time it takes to handle each work item.

Without quality historical work data it can be difficult or impossible to determine the average handling time of various back office tasks, thereby preventing accurate forecasts and efficient schedules from being created. There is often little visibility into individual employee performance and adherence. In those cases, the key is to pull the information you need directly from your agents' desktops and compile that for use in IEX TotalView. This is now possible with Desktop Connect.



DESKTOP CONNECT

IEX offers Desktop Connect to integrate existing systems at the desktop level to gather system and performance data for you to use in ensuring optimal performance. With the Trigger, Monitor and Process modules, you can collect and report information from most agent desktop applications.

Trigger



Trigger collects historical information on the number of work items handled and the handling times from desktop application work – without any integration required. With Trigger you define desktop application events that denote the start and end of a work type. If an agent switches to a different application, a hold event is triggered and if the agent goes to break or lunch, and idle event is triggered. The data from these events provides the historical data for forecasting back office work.

Trigger provides the versatility to work with Windows applications, web applications, Java applets, Java applications and even Windows terminal emulators. Since you are trained to configure Trigger, it is easy to add new work types or change existing ones through the user interface without requiring professional services.

Trigger can also watch for specific events and values, capture specified data and “trigger” actions based on real-time events. It monitors events such as key presses, text entered on a screen and user actions, all of which can be set to trigger alert emails to supervisors, enforce compliance-related actions, prevent data entry errors and document application performance bottlenecks.

Since Trigger is integrated with IEX TotalView Workforce Management software, historical back office data allows for forecasting, scheduling and intraday management of back office work.

Monitor



The Monitor feature is a reporting tool that logs agents’ desktop application usage. It tracks applications used by agents and websites visited by agents. It can also generate timeline reports showing a graphical representation of users’ desktop activities over time. Specifically, Monitor captures detailed data on how users interact with their software applications, including date, time, user name, computer and application names, duration of use and file and web access. And by integrating with IEX TotalView Workforce Management software, Monitor can also report on historical and real-time schedule adherence data.

Monitor contains a powerful reporting system with a web-based graphical interface. Timeline reports offer a graphical representation of users’ desktop activities over time, so you can identify efficient and inefficient activities and see which activities consume the majority of the time. These reports also let you drill down to see finer time resolution, so you can fully understand how each application is being used. You can also create graphical reports that display data such as total application usage in easy to understand bar charts.

Using this comprehensive information to guide them, managers can give employees the tools, training and best practices they need for optimal productivity, increased efficiency and greater job satisfaction.

Process



Process offers you unprecedented visibility into – and understanding of – your company’s day-to-day business processes. The Process module has the unique ability to recognize an entire business process that may span several software applications and multiple steps, and to capture details about how that process is implemented.

The Process feature provides visual insight and outlines routine steps performed by an employee as a business process. For example, gathering customer details, ordering a credit report and obtaining automotive details can be defined as an “Auto Loan Process”. Process tracks and analyzes specific metrics such as duration (including time required for each step), maximum, minimum and average values for users and groups, number of times a process or

step is executed, transaction values or account data at a given stage and process times. With these facts in hand, businesses can document how their best performers accomplish their daily tasks in order to implement best practices throughout the organization.

Management Information Gateway

The Management Information Gateway (MIG) provides the integration of historical and real-time data from Desktop Connect into IEX TotalView. If your back office work also includes phone work, the MIG can also capture CTI events from your telephony systems to track phone work for a complete view that allows you to forecast and schedule your workforce to handle their desktop and phone work.

PERFORMANCE MANAGER

It is difficult to manage back office performance without the ability to capture the data on each agent's work activities. With Desktop Connect capturing the necessary data, Performance Manager from IEX allows you to take your back office performance to higher levels. Performance Manager provides a single, comprehensive solution for tracking, reporting and managing performance throughout all levels of your back office operation. With pre-built metrics, key performance indicators, dashboards, scorecards and reports, the system is built for quick deployment to ensure that you're up and running quickly.



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