



EnsemblePro Feature, Function, Benefit Guide

**WEB CHAT & COLLABORATION, EMAIL MANAGEMENT, KNOWLEDGE MANAGEMENT
AND WORKFLOW DISTRIBUTION**

This document is meant to serve as a technical guide for those users looking to identify the product features, understand their function and have the associated benefit defined.



Features	Function	Benefit
Web Chat & Collaboration	Agents and customers can communicate via text messaging and co-navigate the Web in real-time. The visitor engages an agent through Web chat or assisted co-browsing (when the service agent and customer view Web pages together).	Low-cost and efficient way for agents to assist customers on the Web. Provides real-time personal service.
Text Chat	Text Chat is a form of interaction whereby agents and customers can communicate online via text-based messaging.	Provides customers the ability to interact with an agent online via text messaging.
Chat Distribution	Chat distribution is a process whereby incoming chat requests are automatically queued, prioritized, and routed to agents within the contact center.	Allows for an efficient distribution of work in the contact center.
Inbound Chat Queuing	Customers are automatically placed in a chat hold queue until an agent is available to handle the interaction.	Establishes management of incoming inquiries based on when they entered the queue.
Queue Position Adherence	Inbound chat requests are queued in a sequential order within a chat service. Once queued, callers will be handled in a first in first out (FIFO) basis.	Establishes a priority based on when the chat request was received which allows for the “first in line” to be handled first.
Queue Time Notification	The system can let an online visitor know approximately how long they will be asked to wait before an agent is available to handle their chat request.	Visitors understand where they are in the queue. This helps reduce abandoned sessions, which can lead to increased revenue opportunities in the contact center.
Chat Initiated Page-Based Routing	The system can route a chat request based on the Web page where the customer clicked to chat.	Agents can be better prepared to help visitors by understanding where they are on the site that triggered the chat request.
Chat Requestor-Based Routing	Information captured about the online requestor can be used to determine how the chat will be routed.	Allows for the right agent to handle the chat and thus can increase customer satisfaction and first chat request resolution.
Skills-Based Chat Routing	Skills-Based Routing (SBR) is a method that enables Web visitors to be connected to the best available Chat agent to meet their needs. The system will compare the skill needs of the service to the skill profile of the agent and determine the best-suited agent to deliver the chat request to. The agent that possesses the most adequate set of skills receives the contact first. The rest of the contacts follow the same pattern, passing to agents with lower skill weights when more highly skilled agents are unavailable. If the agents’ skills are equal, the contact goes to the agent that has been idle the longest.	Enables online visitors to be matched to the best available agent online. Allows for greater first-time resolution, increased revenues opportunities, and increased customer satisfaction.

Features	Function	Benefit
Terminal Chat Routing	Terminal Routing is a simplified form of SBR. Agents are ranked in the chat service by the supervisor. The next chat request from the queue will be delivered to the highest ranked agent available. Allows for an alternative to SBR.	Gives flexibility to the supervisor to rank agents.
Circular Chat Routing	Circular Routing is a routing method that allows for an equal distribution of chat requests to agents. The skill profile of the agent is not used - chat requests are simply distributed to agents in order. The first agent receives a contact, the second agent in the queue receives the next contact, and even if the first two agents returned to an idle mode, the next contact goes to the third agent. This chronological sequence is followed until the last agent in the queue receives a contact and the routing begins with the agent at the top of the list again.	Reduces the amount of agent idle time by attempting to provide an equitable distribution of work.
Longest Idle Chat Routing	Web visitor chat requests are routed to the available agent that has been idle the longest.	Decreases idle time so that HR investments can be maximized.
Chat Re-Routing based on Unmanned	If a service is active, but there are no agents logged in to it (or all agents are on break), chat requests can be rerouted to another available service or to an M3 script.	Prevents online visitors from being held unnecessarily in queue by either routing them to another service or to a script. Reduces potential abandons.
Chat Re-Routing based on Queue Length	Contact center managers can provision the maximum number of chat requests that they want in queue at any point in time. If the maximum threshold is reached, chats can be rerouted to another service or to an M3 script.	Prevents an online visitor from being held in queue unnecessarily.
Chat Re-Routing based on Wait Time	Contact center managers can set the maximum time that they will allow a chat request to wait in queue. If the wait time in queue has reached the maximum time provisioned, chats can be rerouted to another service or an M3 script.	Reduces visitor dissatisfaction by limiting long queue times.
Conditional Routing based on Schedule	Routing treatments can be provisioned for when a chat request is received within and outside the defined service schedule.	Gives managers flexibility to control routing throughout the day, whether a visitor sends the request during open or off hours.
Conditional Routing based on Holiday	Chat requests can be rerouted to an M3 script on days designated as holidays.	Gives managers flexibility to control routing throughout the day on holidays.
Chat Requestor Identification Capture	The system can capture information about the chat requestor (such as name and email address) and deliver that to the agent along with the chat session.	Could enable the system to recognize who the visitor is and provides the agent with additional information for follow-up.

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Whisper Message	For multimedia agents, when a chat is delivered to an agent, an audio whisper message can be played to the agent. The whisper message helps the agent to quickly identify the purpose of the chat request before they engage the customer.	Agents are more prepared to enter the chat. Can reduce length of chat and increase customer satisfaction.
Chat Text Attention Retainer	A chat text attention retainer is a sequence of text messages that can be presented to the customer online while they are on hold.	Low cost and efficient way to communicate with online visitors. Keeps their attention while in queue. Target messages on products and services directly at those visiting the company Web site.
Chat URL Attention Retainer	Online visitor can receive a sequence of Web pages or banners while they wait for an agent to become available.	Low cost and efficient way to communicate with online visitors. Keeps their attention while in queue. Target pages on products and services directly at those visiting the company Web site.
Active Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors while they are in queue in an active service.	Low cost and efficient way to communicate with online visitors. Keeps their attention while in queue. Target pages or messages on products and services directly at those visiting the company Web site.
Holiday Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors that initiate a chat request during a Holiday.	Low cost and efficient way to communicate with online visitors. Keeps their attention while in queue. Target pages or messages on company hours, products and services directly at those visiting the company Web site during a Holiday.
Unmanned Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors that place a chat request for a service that is unmanned.	Indicates to the online visitor that no one is available at the time. Avoids unnecessarily long waits in the queue.
Max Queue Length Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors being rerouted due to too many chat requests in queue.	Allows specific messages to be delivered based in the queue, which in turn informs the online visitor how their chat will be handled or routed.
Max Queue Time Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors once their wait time in queue has reached the maximum queue time setting.	Allows specific messages to be delivered based in the queue, which in turn informs the online visitor how their chat will be handled or routed.
Inactive Chat Attention Retainer Messaging	Attention retainer text or URL messages can be delivered to online visitors that initiate a chat request for a service that is inactive.	Inform the online visitor of the operating hours so they can receive the appropriate service.
Multiple Chat Service Support	The system supports multiple chat services and agents working in multiple services concurrently.	Scalable support to meet the demands of the business.
Chat Greeting	A predefined greeting message can be delivered to online visitors as soon as an agent becomes available to handle the chat request.	Allow visitors to understand that they are about to be helped by an agent. Increases agent productivity by automating the greeting text entry.

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Chat Message Variable	Information such as the agent name, date and time can be added to the chat message.	Offers flexibility as to what information is displayed within the chat message.
Chat Salutation	At the end of the chat session, a predefined salutation or close message can be provided to the online customer.	Low cost and efficient way to deliver instructions, information or follow-up contact details. Increases agent productivity by automating the salutation text entry.
Agent-Led Browsing	The agent can control the browser of the customer and navigate them through the Web site.	“Show and Tell” capability enables the agent to help the customer faster, thus increasing the efficiency of the interaction. Meets customer’s need for speed and convenience.
Customer-Led Browsing	The customer can direct the agent to specific pages on the Web site.	“Show and Tell” capability enables the customer to specifically guide the agent to the issue quickly thus increasing the efficiency of the interaction. Meets customer’s need for speed and convenience.
Web Collaboration	Both the agent and customer can interact and co-browse online.	Low cost and efficient way to handle visitor inquiries. Has high value to the company as it allows agents to interact with visitors over a less costly channel than the telephone. Meets customer’s need for speed and convenience.
Web Push	Customers and agents can push specific pages to each other.	“Show and Tell” capability enables the customer to specifically guide the agent to the issue quickly, thus increasing the efficiency of the interaction. Meets customer’s need for speed and convenience.
Web Call Me	Customers can specify a number where they can be called during the chat session. The system will automatically dial that number and connect the customer to the same agent with whom they are chatting.	Meets customer’s need for speed, security and convenience. Allows for “one and done” interaction with the visitor.
Chat Transfer	Agents can transfer an active chat session to another agent or supervisor.	Allows for the customer to have resolution without reinitiating the chat session.
Chat Transcript	A transcript of the textual interaction can be provided to the online customer at the end of the session.	Directions and details obtained on the call can be sent to the visitor, which can reduce the need for another follow-up inquiry.

Features	Function	Benefit
Email Management	Enables customer service departments to route, track and respond to high volumes of customer email and Web form messages.	Increases customer satisfaction, lowers support costs and improves management reporting.
Automatic Email Distribution (AED)	Automated Email Distribution is a process whereby inbound emails are automatically queued, prioritized, and routed to agents within the contact center.	Effectively manage incoming emails without having to manually intervene.
Inbound Email Queuing	Inbound emails to the contact center that are not designated for an auto-response are placed in an email queue until an agent is available to handle the email inquiry.	Establishes management of incoming emails based on when the email entered the queue.
Queue Position Adherence	Inbound emails are queued in a sequential order within an email service. Once queued, emails will be handled in a first in first out (FIFO) basis.	Establishes a priority based on when the email request was received which allows for the “first in line” to be handled first.
Skills-Based Email Routing	Skills-Based Routing (SBR) is a method that enables customers to be connected to the best available agent to meet their needs. The system will compare the skill needs of the service to the skill profile of the agent and determine the best-suited agent to deliver the email to. The agent that possesses the most adequate set of skills receives the email first. The rest of the emails follow the same pattern, passing to agents with lower skill weights when more highly skilled agents are unavailable. If the agents’ skills are equal, the email goes to the agent that has been idle the longest.	Allows for greater first contact resolution as the email sent by the customer will be delivered to the available agent that is best skilled to meet the needs of the customer.
Circular Email Routing	Enables for an equal distribution of emails to agents. The skill profile of the agent is not used - emails are simply distributed to agents in order. The first agent receives an email, the second agent in the queue receives the next email, and even if the first two agents returned to an idle mode, the next email goes to the third agent. This chronological sequence is followed until the last agent in the queue receives an email and the routing begins with the agent at the top of the list again.	Reduces the amount of agent idle time by attempting to provide an equal distribution of work.
Longest Idle Email Routing	Emails are routed to the available agent that has been idle the longest.	Decreases idle time so that HR investments can be maximized.
Email Re-Routing based on Unmanned	If a service is active, but there are no agents logged into it (or all agents are on break), email requests can be rerouted to another available service or to an M3 script.	Prevents emails from being held unnecessarily in queue by either routing them to another service or to a script.

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Conditional Email Routing based on Schedule	Routing treatments can be provisioned for when an email is received within and outside the defined service schedule.	Gives managers flexibility to control routing throughout the day, whether the email is sent during open or off hours.
Conditional Email Routing based on Holiday	Inbound emails can be rerouted to another mailbox or an M3 script on days designated as Holidays.	Gives managers flexibility to control routing throughout the day on Holidays.
Whisper Message for Email	For multimedia agents, when an email is delivered, an audio whisper message can be played to the agent. The whisper message helps the agent to quickly identify the purpose of the email so they can respond appropriately.	Agents are more prepared to handle the email.
Multiple Email Service Support	The system supports multiple email services and agents working in multiple services concurrently.	Scalable support to meet the demands of the business.
Natural Language Processing	Natural Language Processing is a complex algorithm used to read and analyze the subject and body of an email and identify matching responses from the Knowledge Base.	Improves the efficiency of agents by matching standard questions to scripted responses.
Confidence Level	The confidence level is an indicator of the extent of the match resulting from the Natural Language Processing.	Ensures that the replies customers are given answer the question they actually asked.
Email Auto Response	Based on the confidence level obtained from the NLP analysis of the incoming email, the system can send an auto response back to the email originator.	Allows for the automated creation of rapid and reliable responses. This lets agents work on more complex and detailed responses.
Email Assisted Response	Supervisors can provision for emails that have a confidence level lower than a set threshold to be delivered as suggested responses to the agent. The agent will receive a set of suitable answers from the knowledge base that they can then modify prior to responding to the customer.	Greatly reduces processing time for those emails that need to be managed by an agent.
Self-Service Email	In self-service mode, agents have the ability to select emails from the queue that they can handle.	Achieves efficiency in the contact center by allowing agents to respond to email inquiries when they are idle.
Auto-Acknowledgement	An automatic email acknowledgement can be sent to the originator informing them that the email has been received and will be responded to within a set timeframe.	Customers have confirmation that their email was received.
Holiday Acknowledgement	An acknowledgement message can be sent to the email originator indicating that the center is currently closed due to a holiday and that the email will be handled once the center reopens.	Low cost and efficient way to communicate Holiday hour information so customers understand when the company is open for business.

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Same Sender Email Grouping	Emails from the same sender can be grouped and sent to the same agent, minimizing the potential for duplicate or inconsistent responses.	Creates a personalized one-to-one relationship between the customer and the company. Can increase customer satisfaction.
Reply Address Selection	Administrators have the ability to designate the reply address that will appear to the customer once the email is sent. This feature is useful for out-sourcers as it offers them the ability to reply with their client email address.	Gives flexibility to administrators to control reply information.
Do Not Email List	Customers that do not want to be included in an outbound email distribution can be added to the do not email list.	Reduces complaints and complies with anti-spamming requests.
Email Templates	The supervisor can provision standard email responses as part of an email template.	Allows for consistency in customer communications.
Email Attachments	The supervisor can select the set of attachments that the agents can choose from within an email service.	Allows for greater control of information being sent to customers.
Email Greetings	Supervisors can provision standard email greetings to accelerate the response by the agent.	Reducing the amount of tasks the agent has to perform allows for greater efficiency in the contact center.
Email Signatures	Supervisors can provision standard email signatures to accelerate the response by the agent.	Reducing the amount of tasks the agent has to perform allows for greater efficiency in the contact center.
Email Closing	Supervisors can provision standard email salutations/closings to accelerate the response by the agent.	Reducing the amount of tasks the agent has to perform allows for greater efficiency in the contact center.
Email Review	Supervisors can designate that emails from specific agents be reviewed before they are sent out to customers.	Allows for coaching and monitoring of new agents or agents new to handling email. Achieves higher customer satisfaction by being able to review content before it is sent.
Outbound Email Distribution	Emails can be added to a distribution list for an outbound email campaign.	Low cost and efficient method of communicating with customers and or prospects.
Distribution List Provisioning	Supervisors can provision the set of email addresses that will make up the distribution list.	Supervisors have full control over whom the emails are distributed to.
Distribution List Import	Email addresses can be imported in the system for the distribution list.	Emails stored in external databases can be loaded into the system in a quick way.
Distribution List Export	The email addresses that are part of the distribution list in the system can be exported for use by an external application.	Eliminates the need to create multiple distribution lists once one is created for email distribution.
Outlook Client Support	Agents can utilize their existing Microsoft Outlook application as the desktop client for addressing emails.	Allows agents to proactively send emails to those individuals they have contact information for.

Features	Function	Benefit
IMAP 4 Post Office Support	The email management application leverages a customer's existing IMAP 4 compliant post office (e.g. Microsoft Exchange).	Protects a customer's existing investment. Reduces the need to re-configure existing email management.
Knowledge Base	A database of information that contains solutions to problems or relevant information that would answer customer inquiries.	Lowers costs and increases customer satisfaction by providing quick, relevant solutions and information that are available for ongoing re-use by agents.
Agent Assist	The Agent Assist application is a tool that provides agents the ability to query the Knowledge Base to respond to customer inquiries.	Provides for consistent responses across the enterprise from agents. Increases efficiency in the contact center.
New Question & Answer Entry	Supervisors have the ability to add questions and answers to populate the Knowledge Base.	Easy to use vehicle for creating consistent, standard responses from the company.
Question & Answer Modification	Supervisors and administrators have the ability to modify the question and answer entries in the Knowledge Base.	Information is easily updated to ensure correct responses.
Question & Answer Deletion	Individual question and answers in the Knowledge Base can be deleted.	Prohibits agents from responding with outdated information.
Text-Based Response	Responses within the knowledge base can be stored in standard text format.	Allows the agent to cut and paste information and reduces time spent on routine tasks.
URL Response	The responses within the knowledge base can be stored in URL format.	Gives agents flexibility to respond to inquiries by sending a Web page.
Candidate Questions	Supervisors can add suggested questions and answers for the knowledge base. The candidate questions can then reviewed and accepted into the Knowledge Base for general use.	Allows for collaboration to determine appropriate questions and answers.
Knowledge Base Categories	Questions and answers in the knowledge base can be organized in specific categories.	Facilitates the management of the questions and answers and expedites response time.
Ranking based on Frequency of Question	Questions can be ranked based on the number of times they are accessed to build a Frequently Asked Questions (FAQ) list.	Enables business managers to identify the areas of most concern/interest by customers. Also aids the agents in selecting the most appropriate response to the customer inquiry.
User Defined Question Ranking	Supervisors can assign specific rankings to questions as a form of prioritization for the Natural Language Processing. When a Knowledge Base query yields multiple responses for the agent, the responses will be ranked as per the user-defined ranking.	Allows an agent to select the most appropriate response for the question. Allows a company to customize the prioritization of the available responses in the Knowledge Base. As a standard, responses are offered on the basis of confidence level and frequency. The user-defined rank allows a company to list the responses based on other factors (i.e. select canned template, new update, etc.).

Features	Function	Benefit
Workflow	Automation of internal business operations, tasks, and transactions that simplify and streamline current business processes.	Improved organizational efficiency, gains in productivity, improved customer service, increased customer retention, enhanced process control and reporting.
Automatic Workflow Distribution (AWD)	Automated Workflow Distribution is a process whereby inbound work tasks are automatically queued, prioritized, and routed to agents within the contact center.	Improved organizational efficiency, gains in productivity, improved customer service, increased customer retention, enhanced process control and reporting.
Inbound Workflow Queuing	Workflow tasks are automatically placed on hold (queued) until an agent is available to handle the task.	Establishes management of incoming workflow tasks based on when they entered the queue.
Queue Position Adherence	Workflow tasks are queued in a sequential order within an AWD service. Once queued, these tasks will be handled in a first in first out (FIFO) basis.	Establishes a priority based on when the workflow task was received which allows for the “first in line” to be handled first.
Skills-Based Workflow Routing	Skills-Based Routing (SBR) is a method that enables workflow tasks to be routed to the best available agent. The system will compare the skill needs of the workflow service to the skill profile of the agent and determine the best-suited agent to manage the task. The agent that possesses the most adequate set of skills receives the task first. The rest of the tasks follow the same pattern, passing to agents with lower skill weights when more highly skilled agents are unavailable. If the agents’ skills are equal, the task goes to the agent that has been idle the longest.	Better utilizes resources by making those agents best qualified in certain tasks available for those specific services.
Terminal Workflow Routing	Terminal Routing is a simplified form of SBR available in the system. Agents are ranked in the workflow service by the supervisor. The next workflow task from the queue will be delivered to the highest ranked agent available.	An alternative to SBR. Gives flexibility to the supervisor to rank agents.
Circular Workflow Routing	Circular Workflow Routing is a routing method that allows for an equal distribution of workflow tasks to agents. The skill profile of the agent is not used - tasks are simply distributed to agents in order. The first agent receives a task, the second agent in the queue receives the next task, and even if the first two agents returned to an idle mode, the next task goes to the third agent. This chronological sequence is followed until the last agent in the queue receives a task and the routing begins with the agent at the top of the list again.	Reduces the amount of agent idle time by attempting to provide an equitable distribution of work.

Features	Function	Benefit
Longest Idle Workflow Routing	Workflow tasks are routed to the available agent that has been idle the longest.	Decreases idle time so that HR investments can be maximized.
Workflow Re-Routing based on Unmanned	If a service is active, but there are no agents logged in to it (or all agents are on break), workflow tasks can be rerouted to another available service or to an M3 script. This prevents tasks from being held unnecessarily in queue.	Prevents workflow tasks from being held unnecessarily in queue by either routing them to another service or to a script.
Workflow Re-Routing based on Queue Length	Contact center managers can provision the maximum number of tasks that they want in queue at any point in time. If the maximum threshold is reached, tasks can be rerouted to another service or M3 service.	Prevents workflow tasks from being held unnecessarily in queue by either routing them to another service or to a script.
Workflow Re-Routing based on Wait Time	Contact center managers can set the maximum time that they will allow a workflow task to wait in queue. If the wait time in queue has reached the maximum time provisioned, tasks can be rerouted to another workflow service or script.	Prevents workflow tasks from being held unnecessarily in queue by either routing them to another service or to a script.
Conditional Workflow Routing based on Schedule	Routing treatments can be provisioned for when a workflow task is received within and outside the defined service schedule.	Gives managers flexibility to control workflow tasks throughout the day.
Conditional Workflow Routing based on Holiday	Inbound workflow tasks can be rerouted to another workflow service or an M3 script on days designated as Holidays.	Gives managers flexibility to control routing throughout the day on Holidays.
Multiple Workflow Service Support	The system supports multiple workflow services and agents working in multiple services concurrently.	Scalable support to meet the demands of the business.

Asia Pacific & Middle East

Headquarters

Singapore

Tel +65 6883 5059

Fax +65 6534 0484

Australia

Tel +61 2 94100610

Fax +61 2 94100190

Europe and Africa

Headquarters

The United Kingdom

Tel +44 (0) 1753 756 700

Fax +44 (0) 1753 756 701

Germany

Tel +49 (6103) 90 23 0

Fax +49 (6103) 90 23 111

India

Tel +91 11 620 7546

Fax +91 11 620 7560

Japan

Tel +81 3 3251 1212

Fax +81 3 3251 1248

Korea

Tel +82 2 6007 2742

Fax +82 2 6007 2745

The Netherlands

Tel +31 10 258 2643

Fax +31 10 258 2644



Corporate Headquarters

6 Technology Park Drive ▶ Westford, MA 01886 ▶ Tel 978.952.0200 Fax 978.952.0201 ▶ email info@concerto.com

www.concerto.com