

Cisco Unified Intelligence Center: Take Seven Steps to Smooth the Transition from WebView

What You Will Learn

Cisco® Unified Intelligence Center is a web-based reporting application that provides real-time and historical reporting in an easy-to-use, wizard-based application for Cisco Contact Center products. This white paper provides recommendations for a smooth transition from Cisco WebView to Cisco Unified Intelligence Center.

Based on the experiences of Cisco contact centers, the following seven steps are recommended for a smooth transition from WebView to Cisco Unified Intelligence Center:

1. Form a transition team including the roles and expertise to execute on each step.
2. Develop a timeline that includes training, communications, and a coexistence period.
3. Communicate regularly throughout the transition.
4. Offer hands-on training sessions in a town hall format, inviting participants to indicate the WebView reports they want you to move to Cisco Unified Intelligence Center before the cutover date.
5. Create an online user community to provide documentation and support, and a group mailer for everyone involved, including the transition team.
6. Import current WebView reports into Cisco Unified Intelligence Center and create customizable dashboard templates.
7. Develop service and support processes for during and after the transition.

Benefits of Moving to Cisco Unified Intelligence Center

Cisco Unified Intelligence Center enables your contact center supervisors and business users to report on the details of every contact, across all channels in the contact center, from a single interface. The main advantages of Cisco Unified Intelligence Center as compared to WebView include:

- Customizable reports and dashboards: Report designers use a wizard interface to create reports and dashboards that combine stock reports and other web content. Contact center users can easily tailor dashboard content for their business needs by choosing the columns to be displayed, specifying the order, applying filter criteria to identify exceptions, formatting values, and renaming columns. The ease of modifying reports and dashboards spares users from having to go back to the designer for small changes.
- Permalinks: You can provide one-click access to reports and dashboards from any webpage by embedding permanent web links, or permalinks.
- Consolidated view of all contact center channels: Cisco Unified Intelligence Center reports metrics from Cisco Unified Contact Center Enterprise, Unified Customer Voice Portal, Unified E-Mail and Web Interaction Manager, and Cisco SocialMiner® software. Using a single reporting platform for all products reduces training costs for both end users and report developers.

The steps for the transition from WebView to Cisco Unified Intelligence Center are based on the experience of Cisco's internal contact centers. Cisco completed the transition to Cisco Unified Intelligence Center in October 2012. The steps Cisco took and recommend for other world-wide deployments:

Step 1. Form a transition team.

The Cisco transition team included people to organize training, communications, user support, case management, project management, technical support, and engineering resources to help with migrating and editing reports.

Step 2. Develop a timeline.

Select a date for the cutover from WebView to Cisco Unified Intelligence Center. Then work backward to develop a timeline that includes:

- Training sessions
- Communications about the transition
- A cutover period, when agents and managers can use both Cisco Unified Intelligence Center and WebView, to ease the transition
- Retirement date for WebView

Cisco Experience

Cisco selected a cutover date 9 months in the future. Communications began 8 months before the cutover, and training classes began 6 months before the transition. Cisco contact center teams could use both tools for 3 months before WebView was decommissioned.

Initially, Cisco contact center teams did not perceive any urgency to adopting the new reporting application. Adoption accelerated when the transition team made it clearer that WebView would be unavailable after a certain date.

Step 3. Develop a communications plan.

Create and distribute the following communications:

- Announcement of move to Cisco Unified Intelligence Center: Include the timeline and the advantages of Cisco Unified Intelligence Center for your organization
- Training invitation: Provide a detailed agenda, offering four training sessions per time zone or theater and a documentation link to review before training
- Training follow-up: Thank participants for attending the town hall training sessions and remind them that they can find answers to questions in the online user community or address questions to the group mailer
- Reminders as the cutover deadline approaches: Cisco sent three reminders. Each listed the contact centers that had already adopted Cisco Unified Intelligence Center to encourage laggards
- Final roll-out announcement: This announcement represents one more opportunity to provide links to resources, such as the online user community and other content

Step 4. Provide hands-on training.

Consider conducting training in two sessions instead of one long session, separated by at least 1 week. Shorter training sessions help to prevent information overload, and also give participants a chance to ask questions after they have tried Cisco Unified Intelligence Center. A town hall format is recommended as well to encourage participation and questions. Table 1 shows suggested topics for each of the two training sessions.

Follow up with training attendees by phone or in person to see if they have any questions and remind them to begin using the tool. Also, record the training sessions for new agent review or support staff as part of the onboarding process and for review by existing agents as a refresher, making the recordings accessible on the online community.

Table 1 lists suggested topics for the training sessions.

Table 1. Suggested Topics for Cisco Unified Intelligence Center Training

Session 1	Session 2
<ul style="list-style-type: none">• Introduce roll-out plan, including retirement date for WebView.• Explain how to request access to Cisco Unified Intelligence Center; have participants do this during the session.• Explain how to log in.• Explain how to set security permissions for reports.• Review WebView reports that participants want to be available in Cisco Unified Intelligence Center.• Demonstrate features, including:<ul style="list-style-type: none">◦ Drawers◦ Tabs◦ Generating reports◦ Changing filters◦ Pop-outs◦ Exporting◦ Saving reports to team folders; encourage participants to begin doing this◦ Building dashboards• Q&A	<ul style="list-style-type: none">• Review roll-out plan, including retirement date for WebView.• Make a list of WebView reports already migrated to Cisco Unified Intelligence Center.• Review other reports that participants want to have.• Discuss open questions and concerns.• Review how the group mailer works, including the transition team's commitment to 24-hour response; enroll training class participants on the group mailer if they have not already joined.• Review requesting access.• Review how to request support after the rollout.• Demonstrate features, including:<ul style="list-style-type: none">◦ Scheduling reports◦ Setting thresholds◦ Creating permanent web links (permalinks)• Questions

Cisco Experience

Cisco called the training sessions “Town Hall Training Sessions” to reinforce that contact center teams were invited to collaborate during the transition by suggesting WebView reports to move to Cisco Unified Intelligence Center and actively engage in the training.

Cisco trainers delivered both training sessions in person, in multiple global locations. For the convenience of attendees, trainees conducted each session three or four times over the course of 2 to 3 weeks. Trainers kept track of who signed up for and attended the training sessions to make sure that a core group of people in each contact center could share the information with their co-workers.

Contact center personnel were encouraged to attend as many town hall training sessions as they wanted, to master the material and hear other users’ questions. Many attendees experimented with Cisco Unified Intelligence Center between training sessions and brought their custom reports and questions to share during subsequent sessions.

Cisco decided to provide separate training sessions for:

- IT support teams: These training sessions provided the opportunity for the contact center support teams to ask technical questions of the lead project engineer. The transition team also added these IT support personnel to the group mailer so they could see frequently asked questions from users. This process helped to prepare them to provide support after the transition period.
- Contact center report specialists: The training sessions for this group allowed them to explore in detail the capabilities of the product to produce custom reports. The reports and dashboards these individuals created and shared early in the transition process helped to motivate other contact center teams to begin using Cisco Unified Intelligence Center and creating their own reports and dashboards.

Step 5. Develop an online community, documentation, and a group mailer.

Set up an online community in the format that works best for your company, a wiki or website, for instance, to maintain all transition and “how-to” information and documentation in one place. Ask users to sign up for the online community during the training sessions. Consider including the following information in the online community:

- Roll-out timeline
- How to request access to Cisco Unified Intelligence Center
- How to log in, create reports, create permalinks to reports to embed in other applications, and create dashboards
- Frequently asked questions
- Training session recordings
- Adoption statistics
- Current concerns and their resolution status

During the transition it is important to create a group mailer including all users and the transition team. With the mailer in place, invite all users to join to submit questions and learn from the answers to other co-workers’ questions. Consolidating all questions in one place reduces the number of duplicate questions you will receive, and helps users receive answers more quickly. Cisco maintained the mailer through the transition period,

discontinuing it after the transition was complete. At that point, users referred to the online community for information and support.

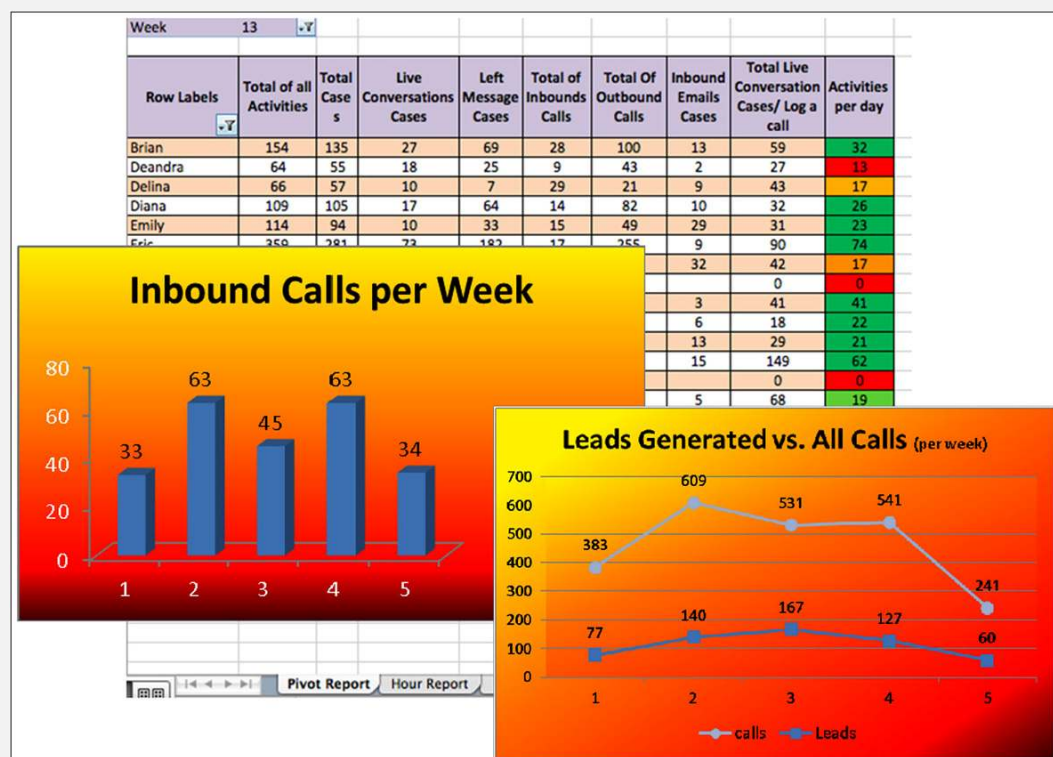
Step 6. Import current WebView reports and create customizable dashboard templates.

To accelerate adoption, identify popular WebView reports and move them over to Cisco Unified Intelligence Center. Ask training attendees for the reports they use and create these reports in Cisco Unified Intelligence Center. These reports can be built from the stock All Fields reports, or you can check to see if customizable report templates are available in developer.cisco.com.

Cisco Experience

The Cisco transition team engaged Cisco Advanced Services to convert approximately 20 custom WebView reports before the transition, and Cisco Services also shared best practices for report development. Figure 1 shows examples of initial reports created using the stock All Fields reports. For more information about engaging Cisco Advanced Services, visit: <http://www.cisco.com/web/services/portfolio/index.html>.

Figure 1. Initial Reports Created Using the Stock All Fields Reports



In addition to the custom WebView reports, the transition team itself also created three customizable dashboard templates to allow users to start with these dashboards and add or remove information to create their own dashboard.

Cisco Contact Center Environment

Cisco has more than 60 contact centers in 20 global locations, and more than 4000 agents. Cisco Unified Contact Center Enterprise routes more than 25 million calls annually through these contact centers. Customer contact centers include Technical Support, Remote Monitoring Services, Customer Service, and internal contact centers including Travel Desk, Human Resources, the Security Operations Center, and Global Internal Technical Support. Reporting requirements vary widely, and some large teams have staff members dedicated to reporting.

The Cisco Contact Center platform includes:

- Cisco Unified Communications Manager
- Cisco Unified Contact Center Enterprise
- Cisco Unified IP Interactive Voice Response
- Cisco Unified Customer Voice Portal
- Cisco Unified Intelligence Center, used exclusively since October 31, 2012

Step 7. Develop customer service and support processes.

It is important to have a customer service and support process in place to help users after the cutover takes place. Some suggestions for service and support follow:

- Assign resources to respond to questions and concerns users submit through the group mailer. For the 30 days before WebView was retired, the Cisco transition team committed to respond to all email messages within 24 hours, publishing the responses in the mailer so that all users could see them
- Prepare to provide phone support for users after the cutover date
- Maintain the online community after the cutover so that users can support themselves
- Implement a process for users to open trouble tickets after the cutover period

Summary

To smooth the transition to Cisco Unified Intelligence Center, use these seven steps as a guideline and learn from Cisco's experiences during the move to Cisco Unified Intelligence Center. Most importantly, keep the lines of communication open and provide users with the training, information, and resources they need for the best chance for success.

Using these steps, at the end of the rollout, adoption within Cisco contact centers had reached 85 percent, increasing to 95 percent within 2 weeks after WebView was decommissioned.

For More Information

To learn more about Cisco Unified Intelligence Center, visit: <http://www.cisco.com/go/ccreports>.



Americas Headquarters
Cisco Systems, Inc.
San Jose, CA

Asia Pacific Headquarters
Cisco Systems (USA) Pte. Ltd.
Singapore

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