

The IEX TotalView system's powerful advanced features help contact centers enhance operational efficiency and effectiveness

Benefits:

- Optimize agent effectiveness in a multiskilled environment
- Manage multiple contact channels
- Automate time-consuming administrative tasks
- Monitor and track agent schedule adherence
- Conduct vacation planning and schedule bidding online
- Gain a clear understanding of goals versus results
- Obtain visibility into outsourced operations
- Get seamless data exchange between critical applications



IEX TotalView Workforce Management Advanced Features

At IEX Corporation, a NICE Systems company, we continually create new ways to help you maximize service delivery while minimizing operational expenses. Our solutions help you spend less time pushing paper and more time managing your greatest assets — your people. We help you empower your agents and provide your managers with the information they need to make better decisions.

Our workforce management solutions address the complex challenges facing both single site and multisite contact centers of all sizes. The IEX TotalView Workforce Management system, a NICE SmartCenter solution, is a single, comprehensive solution for driving the performance of your contact center. By enhancing performance, improving resource planning, streamlining time-consuming tasks and integrating data between applications, IEX TotalView enables your operation to deliver customer-winning service at the lowest possible operating cost.

Building upon the solid foundation of TotalView Central, the system's advanced features deliver even greater power and performance to contact centers. These features address the operational challenges associated with managing multiple agent skills and contact channels, agent self service, agent adherence, performance management, outsourced operations and enterprise level data integration.

MULTISKILL

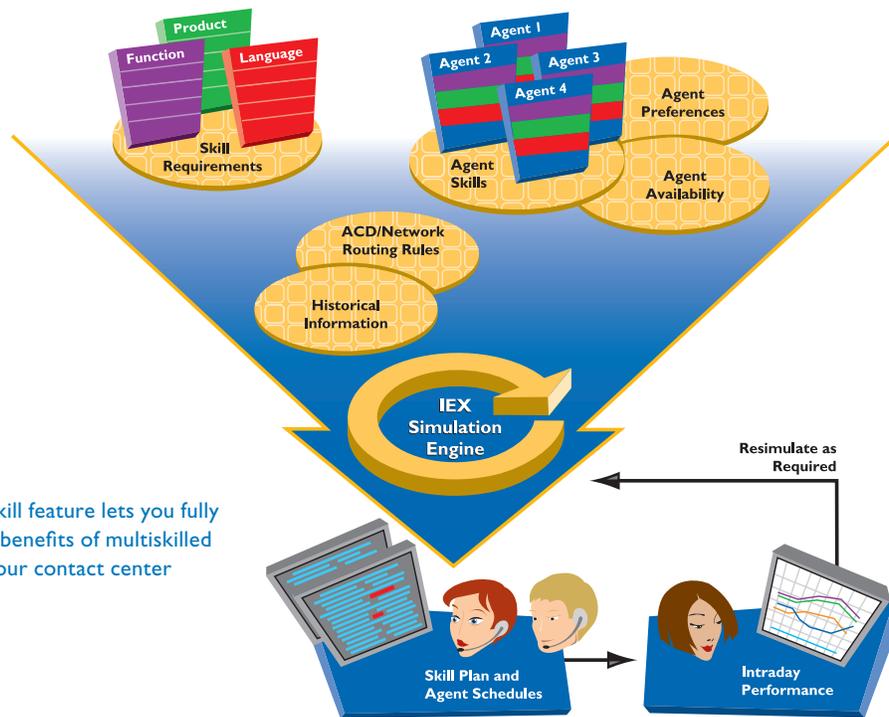
The Multiskill feature optimizes agent effectiveness in a multiskilled environment

- Create real-world schedules quickly and easily
 - Track effectiveness of skill assignments and routing strategies
 - Determine skill requirements and monitor coverage by individual contact type
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The IEX TotalView Multiskill feature makes the most of multiskilled and cross-trained agents. It accurately simulates agent skills and contact arrivals, providing total visibility into staffing requirements while producing the most effective schedules possible.



The Multiskill feature lets you fully realize the benefits of multiskilled agents in your contact center



Patented Multiskill Scheduling

Skills-based routing makes it difficult to determine how many agents, with which skills, will be needed for each contact type throughout the day — especially when using cross-trained agents. Stand-alone simulation programs are impractical, and mathematical formulas don't accurately account for multiskill efficiencies.

The system's patented Multiskill algorithms use a contact routing simulator that is built into the agent-scheduling program. This enables IEX TotalView to create effective schedules in minutes by simulating ACD and network-level routing rules, then automatically adjusting schedules for the best fit. The simulator also evaluates how changes in contact arrival patterns, agent skills or routing rules will affect staffing needs.

IEX TotalView also has a skill block scheduling capability for scheduling off-phone or specific contact work over set blocks of time.

Better Planning for Better Results

The Multiskill feature automatically creates effective forecasts and schedules for multiple contact types to meet service level and agent occupancy goals. It gives you in-depth visibility into individual coverage requirements for each contact type, allowing you to meet precise staffing needs, improve customer service and lower costs.

Multiskill supports skill proficiency levels, position limited skills and advanced ACD features such as Least Occupied Agent, Service Level Supervisor and Reserve Agent. It also allows you to explore what-if scenarios to determine how training for additional skills will affect staffing needs.

Planning and Scheduling for Multisite Operations

Multiskill provides unmatched planning and scheduling capabilities for multisite contact centers. The Multiskill feature understands how contacts will flow to every site and how they will be delivered once they reach each location. This detailed planning level requires a realistic simulation of ACD and network level routing to allocate workload accurately to each site. Otherwise, plans will not match your actual routing results and agent availabilities. The system also provides the ability to allocate work based on each individual site's handling capacity.

MULTIMEDIA

The Multimedia feature enables effective management of multiple contact channels (email, Web chat, fax, etc.)

- Simplify the complexity of running a multimedia contact center
- Deliver consistent service across all channels
- Quickly and accurately account for agent requirements across contact types

The patented IEX TotalView Multimedia feature simplifies multichannel contact management, enabling your operation to provide consistent service while optimizing resources.

Flexible Service Levels

The Multimedia feature lets you specify service level goals for each type of customer contact. You can even set multiple goals within the same contact channel, specifying a 4-hour response goal for service emails while allowing up to 24 hours to reply to general emails.

Channel-Appropriate Algorithms

Accurately determining multimedia staffing needs requires calculations that mirror real-world conditions. For contacts that need to be handled quickly, such as telephone calls, patented IEX simulation technology and BErlang-C algorithms provide precise interval-by-interval results. For contacts with a longer response window, such as email, a workload calculation provides the best answer. With contacts that can be deferred, a new level of planning is needed. In addition to forecasting when the emails will arrive, the system also plans the best time to handle them within the service level window. The Multimedia feature uses the methodology appropriate for each customer contact channel, providing the accuracy needed to effectively schedule resources.

Multimedia Service Delivery

The Multimedia feature gives your operation a single integrated platform for managing service delivery across all channels. After creating forecasts of the contact arrivals and when they should be handled, IEX TotalView creates schedules designed to ensure you have the right people covering the right contact channel at the right time. But it doesn't stop there. As the day unfolds, IEX TotalView Change Manager automatically keeps you up to date on the interval-by-interval performance of your entire operation. At a glance, you can see forecasted versus actual results, giving you an early warning if conditions change unexpectedly.

Active Backlog Management

If not managed effectively, non-abandoning customer contacts like email can rapidly build up huge backlogs, threatening service levels and creating resource allocation problems. The Multimedia feature prevents these problems from occurring by actively managing the volume of backlogged contacts. Backlogs are automatically recalculated throughout the day as new contacts arrive to determine if a problem is developing that needs your attention.

Integrate With Multiskill Scheduling

The Multimedia feature integrates seamlessly with the Multiskill feature. This provides unsurpassed planning and service management in contact centers where agents cover multiple contact channels, handle more than one skill type within a channel or a mixture of both.

With the Multimedia feature you get complete flexibility in determining how multimedia agents are scheduled. Whether your center handles multimedia contacts using separate groups, continuously routes them using "universal queue" technology or schedules them to be worked in specific time blocks, IEX TotalView manages it all.

WEBSTATION

WebStation gives agents and supervisors online access for viewing schedules, monitoring performance and automating many common contact center tasks

- Streamline time-consuming administrative tasks while reducing paperwork
 - Improve agent performance and morale
 - Allow management to process schedule changes and trades fairly
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The IEX TotalView WebStation solution lets agents and supervisors access work schedules and performance information via a Web browser. Automating many common tasks, WebStation improves your center's productivity while promoting agent empowerment.

Using thin-client architecture and connecting to the IEX TotalView server over existing TCP/IP networks, WebStation is easy to use and install — even across multiple sites.

ScheduleViewer

The WebStation ScheduleViewer feature enables agents to see daily, weekly or monthly schedules along with any changes. In fact, agents are automatically prompted to view and acknowledge schedule changes. Supervisors use the ScheduleViewer feature to see their agents' schedules and to verify that the agents have acknowledged changes. If an agent calls in sick and schedules are updated, supervisors can be automatically notified and can view the changes.

StatsViewer

The WebStation StatsViewer feature is a built-in performance management tool. It displays each agent's current and historic performance statistics and, optionally, those of their peer group.

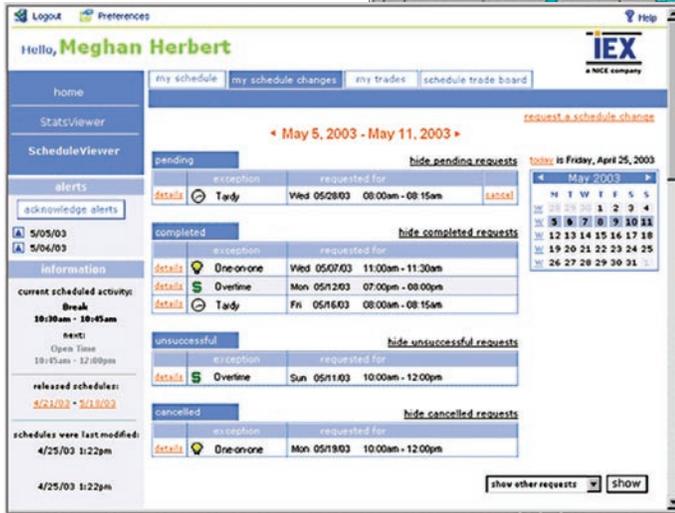
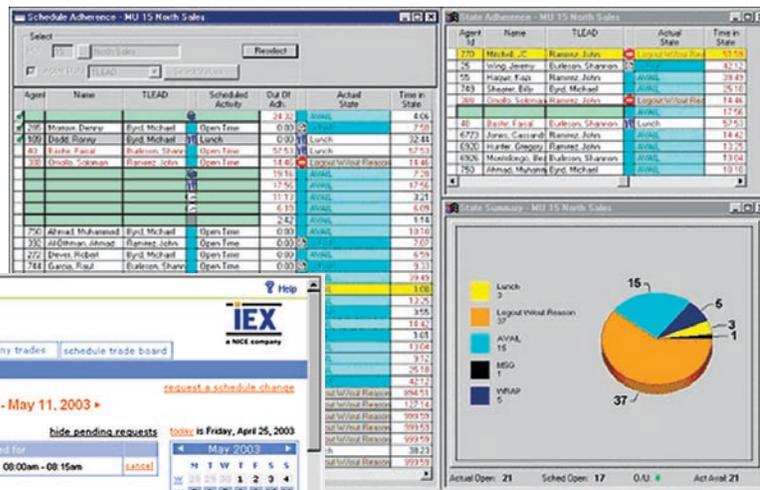
Activity Tracker

The WebStation Activity Tracker lets supervisors see all WebStation activity at a glance. Activity Tracker monitors when agents have logged in and out, whether or not they have received a schedule change notification and whether or not they have acknowledged the change.

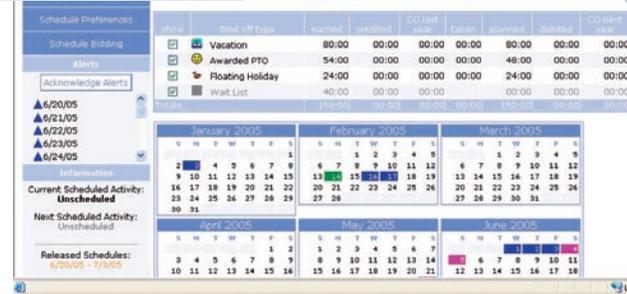
Reporting

The Supervisor WebStation module lets supervisors see how well agents adhere to their schedules by generating adherence and time utilization reports directly to the browser. Sharing this information with agents in coaching sessions improves their schedule adherence and the team's overall efficiency.

The system's intuitive screens make it easy to access the information you need



WebStation



Vacation and Holiday Planner

WebStation Plus

WebStation Plus adds to the WebStation features by providing advanced workflow automation features to streamline schedule changes, schedule bids and trades.

Schedule Changes

The WebStation Plus Schedule Change feature allows agents to easily request changes for vacation time, overtime work, personal time or other activities.

Schedule Trades

The WebStation Plus Schedule Trade feature empowers agents to manage their own schedules by letting them perform trades with other agents by means of a virtual "trade board" or directly with other agents. Agent trade requests can be processed automatically or manually approved by a supervisor. Configurable work rules account for agent skill capabilities, total work hours and many other requirements before granting trade approvals.

Schedule Bids

The WebStation Plus Schedule Bids feature lets agents bid on desired schedules without leaving their workstations. For example, onsite agents can use the bidding feature to select overtime, and home-based agents can use it to bid on multiple segments to create schedules tailored to their availability.

Time Off Manager

WebStation Plus Time Off Manager lets agents request partial or full days for vacation, paid time off or other personal time. Agents may view their entire vacation calendar and waitlist for specific days that are unavailable. Agents can also enter holiday work preferences.

Agent Preferences

The WebStation Plus Agent Preferences feature enables agents to easily update their work schedule preferences. The range of preferences includes: days off, start times, lunch times, weekend schedules and number of scheduled hours. Using the patented Custom Schedule Preferences feature, agents may designate which parameters are most important to them and the order in which they should be prioritized.

ADHERENCE SUITE

Adherence Suite allows managers to monitor and track schedule adherence in real time, as well as view historical reporting

- Identify and correct problems in real time
- Document agent behavior for trend analysis, performance incentives or counseling
- Hold agents accountable for their performance

The IEX TotalView Adherence Suite provides real-time and historical adherence features that enable supervisors to monitor and analyze agent activity. The result is better planning, improved agent performance, lower costs and happier customers.

Real-Time Adherence

Real-Time Adherence provides up-to-the-minute agent state information by comparing agents' current versus scheduled activity using real-time data streams from ACDs and media routers. Supervisors are able to ensure agents follow their set schedules so that staffing levels and customer service levels are not compromised.

The Real-Time Adherence display gives supervisors an at-a-glance view of agent performance. It combines agent adherence information with schedules, adherence to work-state time limits and an overall summary of each state into an intuitive screen. By monitoring agent schedule and state adherence, managers can quickly identify those who need help or coaching while detecting agents who might be manipulating availability to avoid receiving new contacts.

The Real-Time Adherence display also reveals agents who are late or fail to appear for their scheduled shifts, providing early indications of potential staffing problems. The Real-Time Adherence display includes powerful features to monitor and manage agents from a single screen:

- Each agent's supervisor is identified so adherence specialists can quickly make contact as needed.
- User-defined colors and adherence thresholds allow supervisors to set their own adherence tolerances and display preferences.
- Agents are automatically sorted by multiple user-defined criteria, including time out of adherence, state, scheduled activity, agent name and others, so the most critical adherence issues are displayed first.

Historical Adherence

The IEX TotalView Historical Adherence feature provides comprehensive agent adherence reports for past days, comparing scheduled to actual activity as reported by ACDs and other contact routing systems. With Historical

Adherence, supervisors and managers can quickly view and document how well individual agents and agent groups followed their schedules.

VACATION AND HOLIDAY PLANNER

Vacation and Holiday Planner allows managers to automate vacation and holiday planning while providing agents with an online bidding capability

- Automate time-consuming time off management processes
- Promote fairness in the workplace
- Improve employee morale

The IEX TotalView Vacation and Holiday Planner feature streamlines the entire time off management process, allowing you to quickly and fairly respond to time off requests. It saves management time, ensuring objective, rules-based approvals, while improving agent morale by giving them more control over scheduled time off.

Flexible Time Off Categories

With this feature, you can apply unique accrual rates and limits to vacation or holidays, sick time, personal time or other time off. The system rules you establish determine how many agents can be out on a given day, whether partial-day time off is allowed, and whether or not the date ranges can be requested. Time off rules can be unique for different groups of agents within the contact center.

You get the flexibility to group agents by skill type, shift, site or whatever you choose for managing time off.

Time Off Requests

Agents can access the vacation bidding screen on designated workstations located in common areas throughout the center or via WebStation Plus on their desktop browser, using the color-coded calendar and intuitive screens to help them make or modify selections. The screen displays an up-to-date summary of their earned, taken, selected and remaining time off. The color-coded calendar clearly shows which days can be selected and how much time off is available.



In addition to managing ongoing time off requests, the Vacation and Holiday Planner gives agents and supervisors the power to access performance statistics and periodically bid for time off based on seniority, rank or first-come, first-serve priority.

The system can be configured to use a series of bidding rounds, permitting agents to bid for a specified maximum amount of time off in each round. If the requested time is not available, agents can place themselves on a waiting list for that specific time slot. The bidding and wait list screens can be accessed directly by agents or managed by a supervisor.

Additional Features

The Vacation and Holiday Planner offers these additional capabilities:

- Supports partial-day, full-day and week vacations
- Allows weekends prior to and following the selected vacation week to be forced off
- Permits holidays to be set up individually or in groups for fair rotations
- Enables fair, automatic holiday assignment rotations by taking previous holiday work history into account
- Provides a view of vacation data in hours or FTE days
- Maintains vacation time carry-over

PERFORMANCE MANAGER

Performance Manager helps you align and achieve corporate goals throughout your organization

- **Gain a clear understanding of goals versus results**
- **Empower employees for self-management and improvement**
- **View individual and team metrics with automated reporting**
- **Provide clear executive visibility for better decisions**

Performance Manager provides a single, comprehensive solution for tracking, reporting and managing performance throughout all levels of your contact center operation. Your employees will have a clear view of how their performance compares to their personal and department goals, while management will have a better view of the factors driving operational results to establish and align goals.

Provide Meaningful Information

Understanding actual results as they compare with goals is the first step to improving performance. Performance Manager provides this information quickly and effectively with detailed employee scorecards, automated reports for managers and supervisors, as well as dashboards for executive visibility with drill-down capabilities.

With comprehensive online reporting capabilities, managers and analysts can conduct root-cause analyses with ease. You'll also be able to access a variety of sales and performance data from multiple sources in a single application. And because the Performance Manager platform is designed with an industry-standard ETL (extract, transform, load) tool, integrating multiple data sources into one is easy. Performance Manager takes you beyond simply seeing "what" is happening in your business to discover "why" it is occurring.

Motivate Positive Performance

Performance Manager helps everyone in your organization do their job better with easy access to information and quick feedback on performance:

- Agents can better self-manage and improve with a clear understanding of expectations and their actual performance.
- Managers and analysts are able to break free from spending hours each week consolidating spreadsheets and reports from different systems and, instead, can spend that time on more valuable activities such as coaching and mentoring.
- Executives have a comprehensive view of the enterprise, with the ability to drill down to view specific performance data — all the way to the agent level — for better business decisions.

Get Results Fast

Performance Manager is an advanced feature of the IEX TotalView Workforce Management system, providing a solution that gets you up and running quickly. With standard, pre-built connectors, metrics and key performance indicators (KPIs), Performance Manager is quick to deploy and easy to maintain.

And because Performance Manager is an advanced feature of IEX TotalView, it comes with built-in support for multisite management. You can view information and perform analysis at any level — from your entire operation to individual sites, contact types and queues.

Consolidated Data for a Single View

Organizations utilize a variety of systems to help employees perform their jobs more efficiently. IEX integrates data from all of these systems to create the business-focused information that you need to drive success. Based upon configuration of



your business rules and requirements, Performance Manager creates a single performance data warehouse. Using data connectors to extract performance information from other systems on a scheduled basis, consolidated data is stored to enable immediate and direct access via online dashboards to display current and historical views of information.

This automated process means no more manual manipulation, chasing information or consolidation of spreadsheets. Instead, managers and supervisors have more time to focus on specific areas and individuals that need help in order to improve overall performance.

Flexibility as Your Needs Evolve

With an industry-standard, open architecture, Performance Manager is designed for flexibility, expansion and ease of administration. Performance Manager is highly scalable to grow right along with your company, and with standard connectors, it integrates easily with a variety of ACDs, workforce management, quality management and other systems.

OUTSOURCE MANAGER

Outsource Manager provides visibility into outsourced operations, allowing your business to realize the cost benefits, while maintaining a sufficient level of oversight

- **Improve coordination between in-house and outsourced operations**
- **React quickly and effectively to changing conditions**
- **Reduce costs associated with tracking and managing outsourcer performance**

IEX TotalView Outsource Manager addresses the challenges associated with information exchange and resource management between in-house and external contact center operations.

Built on the Industry's Premier Multisite Management System

Outsource Manager extends the proven multisite management capabilities of IEX TotalView to accommodate outsourced contact center operations. Powerful planning and daily management features make it easy to coordinate resources and oversee performance. Built-in flexibility provides the ability to handle a wide variety of internal and external infrastructure configurations, including multiple ACD and network-level routing systems.



Automate Information Exchange

Streamlining the process of sharing information between in-house and outsourced operations provides several benefits. It significantly reduces the manual effort associated with collecting, consolidating and distributing data. It also greatly increases the speed of information flow, which allows both operations to make informed decisions faster and more effectively.

IEX SmartSync technology automates the process of data exchange between IEX TotalView and external systems. Information on forecasts and required staffing levels, scheduled number of agents and intraday performance is periodically exchanged by the Outsource Manager feature.

Improve Outsourcing Results

Tracking outsourcer performance is typically a costly and time-consuming effort. Outsource Manager significantly reduces that effort, giving you more time to focus on ways to improve results. A comprehensive view of in-house, outsourced and combined resources and performance lets you conduct what-if analyses to evaluate benefits of potential changes in work allocation or contact routing strategies.

Benefits for Outsource Suppliers

The IEX TotalView system offers benefits to outsource suppliers as well as their clients. Using IEX TotalView within their own operation allows outsourcers to offer clients an easy way to exchange planning and performance information. This enables the supplier to improve resource management by understanding when an individual client's peak staffing needs will occur and when those resources may be reallocated to another client. Expenses associated with compiling and producing comprehensive performance information for clients are reduced, making it easier to prove the value of outsourcing services and provide supporting documentation for invoices.

SMARTSYNC SUITE

SmartSync Suite enables seamless data exchange with other contact center and enterprise applications

- Enable best-in-class contact center operations without integration challenges
- Simplify integration and maintenance
- Eliminate redundant data entry and streamline processes

IEX TotalView holds a wealth of valuable information in its database — information that is crucial for the operation and useful for many other applications within the center and the enterprise.

SmartSync Suite offers advanced, trouble-free integrations between IEX TotalView and other systems, including: quality monitoring, eLearning, human resources, employee resource management, performance management, agent scorecards, payroll, time keeping, custom applications, ACDs, email, other contact routers and IVR employee access. It streamlines the way your business runs by enabling systems to communicate with each other, eliminating paper-based processes and redundant data entry. This open, easy-to-implement system supports the rapidly changing technology environment of today's contact center, making it easier and less expensive to integrate with other systems.

SmartSync Central and SmartSync Exchange

SmartSync Suite encompasses two powerful solutions: SmartSync Central, which is included as part of TotalView Central, and SmartSync Exchange. SmartSync Central provides standardized interfaces to over 40 ACDs and other contact routing systems to collect historical and real-time information on queues and agents. SmartSync Exchange extends the benefits of SmartSync Central to other contact center applications and systems. It provides full data synchronization between systems while simplifying the process of consolidating information within the center and eliminates the time spent entering redundant information into multiple systems.

Advanced, Trouble-Free Integrations

Other workforce management systems use simple database access technologies to share data, so when these systems are

upgraded, the interfaces often no longer work due to changes in the underlying database structures. SmartSync Exchange isolates the IEX TotalView system's internal database structures from external solutions, resulting in simpler, lower maintenance integrations with less downtime.

Select Best-in-Class Solutions

SmartSync Exchange allows you to select best-in-class solutions across the various contact center technologies, without worrying about integration challenges. This prevents you from being locked into solutions from a single provider.

Eliminate Redundant Data-Entry Tasks

SmartSync Exchange saves you significant time and money by eliminating redundant data-entry tasks. In most contact centers, agent information has to be entered into multiple systems: ACD, workforce management, payroll, human resources and others. Keeping these systems up-to-date requires a lot of work. SmartSync Exchange allows IEX TotalView to automatically synchronize agent information with these other systems.

Flexible Data Export Options

Exporting calculated information, such as schedule adherence for agent scorecards, summarized schedule time for payroll and forecasted staffing levels for performance analysis, is also provided by SmartSync Exchange. The ability to export calculated data greatly simplifies the work needed to supply information to other systems.

Automated Schedule Changes via IVR

Many contact centers allow agents to call in late or sick using IVR systems. SmartSync Exchange simplifies the resulting schedule change process by collecting information from the IVR system and automatically updating agents' schedules. Schedule change notifications can then be automatically forwarded to supervisors, and the workforce planning team alerted to prevent any critical impacts on staffing or service levels.

Professional Services Ensure Success

The IEX Professional Services group will quickly set up your SmartSync Exchange data synchronization. Additional services can be provided by IEX to help you extract information from other systems for importing into IEX TotalView.

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