

Virtual Contact Center Implementation

JumpStart Training for the VCC Premier Plan

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Please review this document to prepare for your JumpStart training sessions.

- An overview of the JumpStart training program
- Information on implementation tasks
- Sample automated call processing options

JumpStart Program

The JumpStart program for the Premier Package provides remote, hands-on training of the Virtual Contact Center Configuration Manager and Agent Console. Thirteen hours of training is delivered in four consecutive training sessions via the web.

- **Session 1:** Configuration Manager Training (2 hours)
- **Session 2:** Configuration Manager Training (3 hours)
- **Session 3:** Configuration Manager Training (2 hours)
- **Session 4:** Agent Training (2 hours)
- **Session 5:** Campaign Dialer Training (4 hours)

The goal of the JumpStart program is to have your Virtual Contact Center configured in a “ready to go-live” status upon completion of the program.

- **Configuration Manager training** helps translate your business objectives and customer experience strategies into your configuration of queues, groups, agent assignments, escalation procedures, and service level management.
- **Agent training provides** a train the trainer session for agent and supervisor tasks such as managing interactions, reporting and FAQs.

Who Should Attend?

The objective of the Configuration Manager training is to educate and guide administrators to confidently manage the setup and configuration of the Virtual Contact Center. **All application administrators should attend these sessions.** Agent training is delivered in a train the trainer method for teaching agent and supervisor tasks via the Agent Console. Assigned agent supervisors and trainers should attend this lesson — class size of 10 or fewer.

Preparation for Training

The following tasks should be started before your JumpStart training begins.

1. **Finalize inbound numbers and initiate number transfers**—After you finalize the inbound phone numbers you will use with the Virtual Contact Center, contact our 8x8 Virtual Contact Center provisioning team to transfer your phone number(s). Please call 1-866-629-0850 or email VCCprovisioning@8x8.com for assistance.
2. **Identify your administrators**—8x8 recommends that you designate a primary administrator with two backup administrators. The ideal administrator is someone who can align customer interactions with an agent's skill sets. Your administrator defines contact center operations and manages agent roles.
3. **Review the technical requirements**—Your IT staff should review the **Technical Requirements** document to ensure that your infrastructure is best configured to interoperate with the Virtual Contact Center. To find the Technical Requirements document, go to: <http://www.8x8.com/Support/BusinessSupport/Documentation.aspx#a8>
 - Click the documentation link for your version of Virtual Contact Center and select **Technical Requirements**
 - Features that may require your IT or operations team to make changes are:
 - Personal computers, laptops, browsers
 - VoIP softphones and VoIP desk phones
 - Network Ports UDP and TCP ports and QoS settings within your network infrastructure
4. **Draft a call flow diagram to be used during your training session**—Please do this prior to your scheduled training session. Reference Appendix A for an example of a call flow document. Your trainer will help you understand the available options and configure the IVR to achieve the best customer experience based on the information you provide.
5. **Maintenance notification distribution list**—8x8 sends maintenance notifications via email. We recommend that you ask your email administrator to set up an email distribution list that includes all employees in your company who want to be notified of Virtual Contact Center Maintenance. The Administrator enters the maintenance distribution list in the **Configuration Manager > Home Menu > Profile tab**.
 - Example of an email distribution list: admins@mycompanydomain.com
6. **Agents**—Compile a list of your employees who will use the Virtual Contact Center to interact with customers. The list should include:
 - First and last name
 - Virtual Contact Center login name (typically first initial and last name)
 - Valid email address
 - Phone number (or URI for softphones) the user will use as their agent number in the Virtual Contact Center
7. **Agent physical phones**—Make sure that each agent has a direct-dial phone number if they will be using a physical phone. Agent phones must be dedicated to Virtual Contact Center use. The following rules apply:
 - Callers should not dial agent phone numbers directly
 - Agent phones cannot be a part of a hunt group or multi-line appearance
 - Agent phones cannot use call forwarding or call waiting
 - Voicemail should be disabled or the answer time set to a higher ring count than the prompting timeout value in the Virtual Contact Center (prompting timeout is covered in training)
 - Each agent should have an assigned email address

8. **Agent softphones**—If agents will be using 8x8-provided softphones (Bria 3), the software must be downloaded and installed. Please refer to the document emailed to you by 8x8’s provisioning team for download links and license keys. After downloading the application, the Bria softphone must be configured. **Please refer to the Configuration Guide on our website for Bria softphones. To find the Configuration Guide**, go to: <http://www.8x8.com/Support/BusinessSupport/Documentation.aspx#a8>
 - Click the documentation link for your version of Virtual Contact Center and find the guide for Bria softphones in the **VoIP Phone Configuration and Setup** section.
9. **SIP phones**—If you are using SIP phones not provided by 8x8, configure them to use 8x8’s SIP by following the instructions specific to your phone’s model. Configuration instructions are located online at: <http://www.8x8.com/Support/BusinessSupport/Documentation.aspx#a8>
 - Select your Virtual Contact Center version, then go to the VoIP Phone Configuration and Setup section, and click on the configuration guide specific to your SIP phone’s model.
10. **Your Virtual Contact Center login information is emailed to you from the 8x8 provisioning team**—Send the login information to all JumpStart participants to ensure that all students (Administrators and Trainers) have the login and documentation links for training. **Note: The email subject says “Welcome to 8x8 – Applications Link.”**
11. **Review the demo**—All JumpStart participants should review the demo prior to the first JumpStart session. The demo can be viewed at: <http://www.get8x8.com/VCCVideos/2AgentConsoleProfile/AgentConsoleProfileFinal.htm>

Training Milestones

Session One

Introduction to the Configuration Manager

- Logging in
- Navigation
- Completing system passwords, defining administrator passwords, and setting the Contact Center time zone
- Review dial plans

Account Manager Access

- Log in to account manager and navigation
- How to set up and test channel re-routing

Configuring Agent Security

- Password policies
- Role-based management

Configuring Groups and Agents

- Define logical agent groups
- Configure agents and permissions
- Optionally, review Named Users versus Concurrent Access seat

Broadcast Messaging

- Sending broadcast messages and best practices

Configuring Inbound Call Processing

- **Step One:** Define schedules of operation and review audio files
- **Step Two:** Configure voicemail and phone queues

Homework

- Complete password policies
- Complete group and agent configurations
- Create all remaining phone/voicemail queues and schedules

Session Two

Review Session One

- Questions and answers

Configuring Inbound Call Processing (Continued)

- **Step Three:** Configure the phone channel
- **Step Four:** Configure automated call processing rules (IVR Scripting)
- **Step Five:** How to record and upload custom audio messages

Note: Your call flow diagram is used as a reference to create your IVRs

Status and Transaction Codes Configuration

- Create Agents Status Codes
- Create Transaction Codes
- Create Outbound Phone Code

Configuring the Local CRM/Integration with Supported External CRMs

Local CRM

- Creating custom fields — Local CRM
- Case escalation — Local CRM
- Email and case properties — Local CRM
- Review requirements for importing CRM contact records — Local CRM

External CRM Integration

- Review required settings in Configuration Manager and Agent Desktop Profile
- Review required setting in the External CRM Administrative console
- Demo functionality

Homework

- Complete all phone channels and IVR scripts
- Record custom messages and upload into the application
- 8x8 suggests that temporary custom recordings be created and used to test functionality prior to ordering custom recordings
- Complete Local CRM or External CRM settings

Session Three

Review Session Two

- Questions and answers

Configuring Email (Optional)

- **Step One:** Define email processing hours (optional)
- **Step Two:** Configure email queue
- **Step Three:** Configure email channel
- **Step Four:** Build the automated processing rules (email scripting)

Configuring Chat (Optional)

- **Step One:** Configure chat queue
- **Step Two:** Configure chat channel
- **Step Three:** Discuss support center direct URLs
 - Your admin will use these links to incorporate into your website

Configuring Status, Transaction and Outbound Codes and Best Practices (Optional)

- Create Agents Status Codes
- Create Transaction Codes
- Create Outbound Phone Code
- Outbound Phone Codes

Review Support Center Capabilities (Optional)

The Support Center provides a series of customer self-service web page URLs that can be placed on your website for your end-customer access:

- Review the capabilities of the support center
- Exploring FAQs for frequently requested information
- Initiating a chat with your online agents
- Review VCC generated links for incorporation into your website

Note: Actual integration with your website is not covered by the JumpStart program — if desired, additional services are available from 8x8 Professional Services.

Wallboard

- Overview of available matrix data
- Setup and configuration of a Wallboard instance
- Run demo of the configured Wallboard instance — Default is (3) Wallboard instances

Homework

- Complete email queues, channels and scripts
- Complete chat queues and channels
- Complete status and transaction codes
- Provide chat link to webmaster for activation on website

Session Four

Review Session Three

- Questions and answers

Agent and Supervisor Agent Training

This lesson is presented in a train the trainer fashion for training your agents and supervisors. Training is customized to the features that you are using.

- Agent Training
 - Set up and review Agent Profile
 - Managing telephone interactions
 - Broadcast messaging
 - FAQ creation and use samples, e.g., direct-dial directories
 - Demonstrate how to create Agent "My Recording"
 - Review VCC Tenant failover process
 - Review Local CRM utilization customer, case management
 - Review Utilization of Status, Transaction and Outbound Phone Codes
- Supervisor Agent Training
 - Monitoring tools (Supervisor Console)
 - Review of standard available reports
 - Review how to create, save and run custom reports

Session Five:

VCC Dialer Campaign Training

This lesson uses the trainer's Virtual Contact Center training tenant to demonstrate how to configure and set up the Campaign Dialer and to communicate core concepts for setting up the application to configure and run the Campaign Dialer.

A discovery session might be required for capturing information needed to set up a VCC campaign dialer specific to your requirements. Due to the scope of the material to cover, this training section may be scheduled to span over two days.

Identify if the intent is to use the local CRM or Salesforce.com CRM for processing of source data and the resulting disposition actions.

Below are topics for setup and configuration of the preview dialer using the VCC Local CRM.

- Capture outbound campaign requirements
- Capture and configure CRM custom fields
- Create schedule for the campaign
- Configure and set up campaign transaction codes
- Demo importing of source data into VCC CRM
- Configure outbound setup/properties and target type
- CRM objects to define
- Review uploading of audio files specific to the campaign (optional)
- Creating an outbound call campaign
- Properties and queue(s)
- Define disposition actions in outbound setup
- Managing outbound calling campaigns
- Running available campaign reports
- Define campaign supervisors
- Executing a campaign (pausing, re-running)
- Filters
- Sort criteria
- Tracking campaign responses — CRM reports
- Discuss and demo utilization of the campaign filters

Appendix A Sample Flow Diagram

Prior to your training session, please create a call flow diagram for your company.

