

# CXone Performance Management

## Feedback Manager Integration

### Solution Description

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This is a turnkey integration that pulls the metrics outlined below from Feedback Manager into the CXone PM system. This will allow you to view Feedback Manager metrics in the same dashboards and wallboards as ACD metrics, as well as other systems, integrated within the CXone PM tool.

### Description of Services

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#### Deliverables:

1. Establish connection to additional database using SFTP
2. Build stored procedure and standard metrics from database
3. UAT (User Acceptance Testing)

#### Completion Milestones:

1. Connection feeds turned on by NIC
2. Pre-defined metrics built
3. Customer UAT (User Acceptance Testing)

#### Connection Guidelines:

1. Data feeds must be turned on by the NIC TAM or NIC PM and should do so at the time of a resource request
  - Once the feed is turned on a folder will be created that Feedback Manager will post files to
2. CXone PM needs to receive notification that step 1 has been completed and told the name of the folder.
3. CXone PM will then create an SFTP import to pull this file and push it into our staging tables.

#### Reporting Guidelines:

1. All Feedback Manager reports are for historical data only

#### Metric Guidelines:

1. Only metrics listed below will be included as “standard” for integration completion
  - Variations of standard metrics can be made available to customers at no additional charge
2. Metrics will be assigned to the current hierarchy in client’s environment as applicable. I.E. Survey question metrics will be viewable by based on the call the survey is based on.
3. Any additional metrics required will be considered “custom”
  - Custom metrics will need to be scoped out by a database specialist
  - Custom metrics will require PS hours to be completed
  - Custom metrics will NOT begin until the standard integrations is completed and accepted by the customer

#### NICE inContact Responsibilities:

1. Assign named Professional Services resources to the implementation team for this engagement to include the following:
  - Project Manager**
    - Coordinate and manage NIC resources that work with Customer Project Manager and CXone PM team
    - Turn on Feedback Manager Feeds for CXone PM to retrieve data

- Provide reports from Feedback Manager to CXone PM to allow validation to be completed
  - Issue communication on project status
2. Finalize project timeline for real-time report templates using custom dashboard modules.
  3. Support Customer in User Acceptance Testing in the Performance Dashboard.

### Customer Responsibilities:

1. Identify internal Subject Matter Experts (SMEs) to participate in the implementation project, to include:
  - Project Manager to organize required Customer resources necessary to complete requirements definition, perform review of deliverables, and provide sign-off on project deliverables.
  - Contact Center Reporting SME to participate in requirements definition and conduct User Acceptance Testing
2. Develop User Acceptance Test plan and cases.
3. Develop test data for User Acceptance Testing.
4. Execute User Acceptance Test cases and provide to NIC written notification describing defects encountered during the UAT process.
5. Provide sign-off on the deliverables and milestones described in this SOW or written notification outlining any deficiencies within five (5) business days of receipt.

### CXone Performance Management Responsibilities:

1. Assign named Professional Services resources to the implementation team for this engagement to include the following:
  - Project Manager**
    - Work with NIC TAM/PM to get feeds turned on
    - Present metrics for User Acceptance Testing
  - Data Architect**
    - Retrieve and set up connection once folder and feeds are turned on
    - Set up integration
    - Build standard metrics
2. Build the integration and standard metrics.
3. Conduct integration testing.
4. Conduct validation testing
5. Support Customer in User Acceptance Testing in the Performance Dashboard
6. Respond to defects identified during Customer's User Acceptance Testing.
7. Scope any "custom" metrics that may be requested.

### Included Standard Metrics

| Metric Name        | Abbreviation | Metric Components & Calculation                        | Notes   |
|--------------------|--------------|--|---|
| Surveys Submitted  | Surveys      |  | Count of all the Surveys Submitted (by submission date, reported on the agent who took the call for the Employee Hierarchy and reported on the call/contact ID for the rec hierarchy) |
| <Question 1> Count | <Q1>         | Base_Metric_Name = '<Question 1>'                      | Count of all <Question 1> responded to  |
| <Question 2> Count | <Q2>         | Base_Metric_Name = '<Question 2>'                      | Count of all <Question 2> responded to  |
| <Q1> Resp<A> Count | <Q1RA>       | Base_Metric_Name = '<Question 1>' and thelabel = '<A>' | Count of all <Question 1> with response <A>   |
| <Q1> Resp<B> Count | <Q1RB>       | Base_Metric_Name = '<Question 1>' and thelabel = '<B>' | Count of all <Question 1> with response <B>   |
| <Q2> Resp<A> Count | <Q2RA>       | Base_Metric_Name = '<Question 1>' and thelabel = '<A>' | Count of all <Question 2> with response <A>   |

## Customer Acceptance

Clearview Signature:

Printed Name:

Title:

Date: