

# CXone Performance Management

## Standard Engage Integration

## Solution Description

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

## Description of Services

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### Deliverables:

1. Using the Tenant ID as the company's unique identifier, obtain Engage data
2. Build stored procedure and standard metrics from database
3. 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.
2. CXone PM needs to receive notification that step 1 has been completed and given the Tenant ID.
2. CXone PM will then ingest the data into our staging tables

### 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. Form score metrics will be viewable by Agent/Team/etc., but not necessarily by Skill/Campaign if evaluation is not done on a contact.
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 Engage Feeds and provide Tenant ID.
    - Provide reports from Engage 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

### Completion Milestones:

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

### Reporting

1. All Engage reports/pieces of data are for historical data only

## 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**
    - Set up integration once feeds are turned on
    - 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 and Calculation	Notes
Form Count	Form Count		Shows a count of the forms arranged on the date
Form Score	Form Score		Used in creation of the Average Form Score Metric
Avg. Form Score	Avg. QA Score	Form Score/ Form count	Shows the average form score of all the reported forms
Section Count	Section Count		Shows the number of times section (s) have been completed in a form
Section Score	Section Score		Shows the scores of sections (s) that have been completed in a form
Avg. Section Score	Avg. Section Score	Section count/ Section score	Shows the avg. sectionn score for each section
Critical Fails	Critical Fails		Shows a count of forms graded with a critical fail
Answer Count	Answer Count		Shows a count of the number answers for a particular form

Customer Acceptance	
Client Signature:	
Printed Name:	
Title:	
Date:	