

# WORK AUTOMATION - ROADMAP UPDATE



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THE POWER OF US

# Key features

## WORK AUTOMATION AND TASK ROUTING



**CAPTURE:**

Group all work together



**MANAGE:**

Prioritize & establish  
business flows



**AUTOMATE:**

Optimize process  
efficiency through  
automated workflows



**DISTRIBUTE:**

Distribute to skilled and  
available resources



**ANALYZE:**

Deliver on SLAs  
& maintain  
work-balance

# CORE FUNCTIONALITY

## CONFIGURATION

- Define workbins & work types
- Apply custom attributes
- Date-based logic
- Visual flow mapper

## WORKFLOWS

- Create workflows and transitions
- Define custom business rules
- Execute business logic

## PROCESSING

- List view
- Parking support
- Inline editing
- Manual assignment

## ROUTING

- Route tasks to agents
- Use standard routing methods
- Native UI integration

# Common use cases across industries



## Telecommunication

- Onboarding / activation
- Billing / collection
- Service request management



## Finance and banking

- Loan application
- Credit card application



## Government

- Traffic fine collection
- Tax collection



## Service provider

- Road-side assistance
- Billing disputes



## Healthcare

- Appointment management
- Medical waste management



## Insurance

- Claim management
- Fraud management



## Retail

- Lead detection
- Return logistics management



## Utilities

- Billing / collection
- Truck rolls

## Custom workflows to drive business processes

### WHAT WILL A CUSTOMER DO?

Create comprehensive workflows to manage the lifecycle of tasks

### WHAT DOES IT MEAN FOR THE BUSINESS?

Add automation or route workitems to agents at the right time to deliver the best business results

### DRIVE CUSTOM BUSINESS LOGIC THROUGH EACH STATUS CHANGE!

1

Define your starting point

The screenshot shows the 'Status Transitions Builder' interface. At the top, there are tabs for 'Details', 'Properties', 'Routing', 'Status Transitions Builder', and 'Auto Status Transitions'. Below the tabs, the 'Workitem Initial Status' is set to 'Open'. The main area is divided into four sections, each representing a status and its possible transitions:

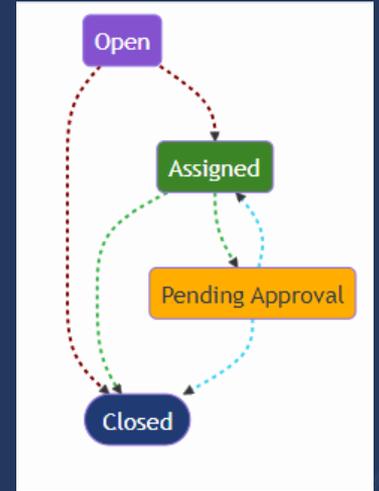
- Open:** Shows a dropdown menu with 'Open' selected. Below it, there are buttons for 'Assigned' and 'Closed'. There are also links for '+ Add more restrictions' and 'Clear all restrictions'.
- In Progress:** Shows a dropdown menu with 'Assigned' selected. Below it, there are buttons for 'Pending Approval' and 'Closed'. There are also links for '+ Add more restrictions' and 'Clear all restrictions'.
- On Hold:** Shows a dropdown menu with 'Pending Approval' selected. Below it, there are buttons for 'Assigned' and 'Closed'. There are also links for '+ Add more restrictions' and 'Clear all restrictions'.
- Closed:** This section is currently empty.

2

Define custom statuses for each step of the process

3

Visualize workflows for easy testing



## Provide visibility to all work across the business

### WHAT WILL A CUSTOMER DO?

Manage all activity across the customer lifecycle including tasks & communications

### WHAT DOES IT MEAN FOR THE BUSINESS?

Gain a clear understanding of all work that transpires in the contact center & back office

### ONLY WITH VISIBILITY ACROSS ALL PARTS OF THE BUSINESS WILL THEY BE SUCCESSFUL!

View key attributes including priority values, due\_dates, agent assignments to understand what's active and in the backlog

Filter on relevant details like work type, queue or agent

Workitems List  
Home | Default Workbin

Get Workbins From: Home | Workbin: Default Workbin

Reset View Refresh Results

| Priority | Due Date   | Status   | Routing State | Worktype          | Name             | Queue       | Assigned To  | Date Created | External Tag | Last Modified |   |
|----------|------------|----------|---------------|-------------------|------------------|-------------|--------------|--------------|--------------|---------------|---|
| 100      | 10/20/2022 | Assigned | Declined      | Chris B Workty... | Yusuf Workite... | ChrisBohlin | Chris Bohlin | 10/19/2022   | None         | 11/18/2022    | ⋮ |
| 100      | 12/17/2022 | Closed   | Disconnected  | Chris B Workty... | Route to Agen... | ChrisBohlin | Chris Bohlin | 12/16/2022   | None         | 12/24/2022    | ⋮ |
| 100      | 10/20/2022 | Assigned | Declined      | Chris B Workty... | Yusuf Workite... | ChrisBohlin | Chris Bohlin | 10/19/2022   | None         | 11/18/2022    | ⋮ |
| 100      | 10/20/2022 | Assigned | Disconnected  | Chris B Workty... | Yusuf Workitem   | ChrisBohlin | Conor Walsh  | 10/19/2022   | None         | 10/24/2022    | ⋮ |
| 100      | 10/20/2022 | Assigned | Disconnected  | Chris B Workty... | Yusuf Workitem   | ChrisBohlin | Conor Walsh  | 10/19/2022   | None         | 10/24/2022    | ⋮ |
| 100      | 10/20/2022 | Assigned | Disconnected  | Chris B Workty... | Yusuf Workitem   | ChrisBohlin | Conor Walsh  | 10/19/2022   | None         | 10/24/2022    | ⋮ |
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| 100      | 10/20/2022 | Assigned | Disconnected  | Chris B Workty... | Yusuf Workitem   | ChrisBohlin | Chris Bohlin | 10/19/2022   | None         | 10/24/2022    | ⋮ |
| 100      | 10/20/2022 | Assigned | Disconnected  | Chris B Workty... | Yusuf Workitem   | ChrisBohlin | Yusuf Cinar  | 10/19/2022   | None         | 10/24/2022    | ⋮ |

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Drill into specific details to view comments, read history, and take actions

## Agent desktop work item view

### WHAT WILL A CUSTOMER DO?

Deliver the right information at the right time for agents to complete their work efficiently

### WHAT DOES IT MEAN FOR THE BUSINESS?

Ensure that your agents have the information they need at their fingertips

### EQUIP YOUR AGENTS WITH THE RIGHT TOOLS

Each new task is easily identified with the appropriate information and status

Search for important attributes to be able to gain context and complete tasks efficiently

Activity Directory Documents Performance Reports Admin

Conversations

Cara Reynolds 0:19

Home & Auto Insurance  
Work in Progress

George Smith +

Home & Auto Insurance  
Please send me home loan appli... 2 mins

Home & Auto Insurance  
Thank you! 1 min

Returns Request

Workbin: EMEA CS Team 1 Worktype: Returns Due: 2 Hours Priority: 10000000

Find custom attributes

Product ID: ZZ1243531 Product type: Men's Tree Runners Customer Paid: \$110.24

Receipt ID: RR2343234 Product Size: 10 M Return Code: A123

Returns Accepted Until: 04/30/2022 Payment Method: MasterCard Transport Method: UPS

Sales Channel: Wholesale Date of Distribution: 03/25/2022 Date of Delivery: 03/29/2022

Sales Channel: Wholesale Date of Distribution: 03/25/2022 Date of Delivery: 03/29/2022

Sales Channel: Wholesale Date of Distribution: 03/25/2022 Date of Delivery: 03/29/2022

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Change Status  
Work in Progress

Status Information  
Work in Progress

This description gives more context to the agent about the currently selected status

Auto Transition: Closed 23:22:21

Update the status of a work item to move onto the next action to complete the process successfully.

# Schema Builder

## WHAT WILL A CUSTOMER DO?

Define attributes to be used for business rules, agent UI, and reporting

## WHAT DOES IT MEAN FOR THE BUSINESS?

Leverage attributes to inform users, understand workloads, and drive business process

**CUSTOMIZE YOUR DATA TO DRIVE BUSINESS PROCESSES EFFECTIVENESS**

Define custom labels for each attribute

Set min and max values for each data entry

Add attributes to define the schema

Search Filter

| Name                       | Key                                 | Field Type         | Description             | Min Value    | Max Value      | Actions |
|----------------------------|-------------------------------------|--------------------|-------------------------|--------------|----------------|---------|
| Application Created        | application_created_datetime        | Date & Time Field  | -                       | -            | -              |         |
| Application Status         | application_status_enum             | Dropdown           | -                       | -            | -              |         |
| Application Status Updated | application_status_updated_datetime | Date & Time Field  | -                       | -            | -              |         |
| Application Type           | application_type_enum               | Dropdown           | -                       | -            | -              |         |
| Civilian Status            | civilian_status_checkbox            | Checkbox (Boolean) | -                       | -            | -              |         |
| Days                       | days_integer                        | Integer            | -                       | 0 Count      | 1,000 Count    |         |
| Email Address              | email_address_text                  | Small Text Field   | -                       | 0 Characters | 100 Characters |         |
| Email Holdout Strategy     | email_holdout_strategy_enum         | Dropdown           | -                       | -            | -              |         |
| Engagement Level           | engagement_level_enum               | Dropdown           | -                       | -            | -              |         |
| First Name                 | first_name_text                     | Small Text Field   | -                       | 0 Characters | 100 Characters |         |
| IRN                        | irn_identifier                      | Identifier         | -                       | 0 Characters | 100 Characters |         |
| Last Name                  | last_name_text                      | Small Text Field   | -                       | 0 Characters | 100 Characters |         |
| Lead Source                | lead_source_enum                    | Dropdown           | INET ACRF REFR ALUM RTY | -            | -              |         |
| Lead State                 | lead_state_enum                     | Dropdown           | -                       | -            | -              |         |

Add Custom Attribute 23/50

1

2

3

Select from predefined attribute types

## Triggers User Interface

### WHAT WILL A CUSTOMER DO?

Listen for all CRUD actions and take immediate action

### WHAT DOES IT MEAN FOR THE BUSINESS?

Execute business logic at the appropriate time to update backend systems, make additional communications, or start other processes

### REACT TO EVERY CHANGE AS SOON AS IT OCCURS

The screenshot shows the configuration page for a trigger named "Task Routing Returns". The interface includes several sections:

- Header:** "Task Routing Returns" with a sub-label "Event Based" and an "Active" toggle switch.
- Description:** "Trigger created to manage the tasks for customer product returns."
- Configuration Fields:**
  - Select a topic schema:** A dropdown menu with "v2.taskmanagement.workitems.(id)" selected. A callout "1" points to this field with the text "Listen for specific workitem notifications".
  - Select target type:** A dropdown menu with "Workflow" selected.
  - Select workflow target:** A dropdown menu with "SendSMSForPaymentReminder15" selected.
  - Run trigger:** Radio buttons for "Run immediately" (selected) and "Schedule".
- Define conditions:** A section titled "Define conditions" with a note: "The trigger must match all of the following criteria. [View help on filter operators](#) and how they work."
  - Condition 1: "worktypeid" equal to (==) "Returns Request".
  - Condition 2: "statusId" equal to (==) "Open". A callout "2" points to this condition with the text "Look for specific matching criteria to trigger a workflow in architect".
  - Condition 3: "workbinid" equal to (==) "Enter value".
- Schema Editor:** A panel titled "SCHEMA" showing a JSON path: `"workbinId": "string"`. A callout "3" points to this panel with the text "Paste in JSON path for easy creation".

# TASK AUTOMATION & ROUTING: NEXT ADVANCE IN AUTOMATION



## Triggers UI

Build listeners to execute business logic (via architect) whenever a workitem is added or modified

## DELIVERED

● Q3



## List View – Advanced Filtering

Apply filters across worktypes, queues, assigneeID, and more



## Bulk Updates

Support for Bulk Create and Bulk Terminate



## WorkItem Flows

Admins will be able to build specific 'workitem flows in architect deducing needs for data actions and API use



## Agent UI Support

Features includes transfer, park, disconnect, update status, wrap-up, comments, view attributes & more

## IN PROGRESS

● Q4



## Performance Views

View workitem data at both a queue and agent levels to understand work volumes, handle, and focus metrics



## SLA Definition & Reporting

Manage workitem service levels for the life of the task (SLA = % of workitems completed by due\_date)



## Forecasting & Scheduling

Understand *all* work users across the org handle to accurately forecast and staff appropriately



## Relationships & Dependencies

API support to link conversations & workitems

● 1Q24



## Agent UI Auto-answer

Increase agent efficiency by automatically answering/connecting workitems in the agent's roster



## Date Automation APIs

Pre and post-date business logic support for dynamic prioritization, due\_date alerts, etc.



## Scriptor Support

Present agents with custom scripts when connected to workitems



## Embedded Framework

Basic Answer support for embedded framework integrations



## Analytics Workload View

View daily/weekly volumes of upcoming or past due tasks at workbin, worktype, or queue levels



## QM Evaluations and Policies

Generate automated reviews of workitems delivered to agents alongside existing evaluations.



## Screen Recording

Record screen activity of agents when connecting to workitems



## Generic Rules Builder UI

Enable multiple data points to capture intent and return relevant data to best manage workitems

## TARGET

● FUTURE



## Bespoke Integrations

**CRM:** SFDC, ServiceNow, SAP  
**RPA:** Automation Anywhere  
**Partner:** Eccentex, Appian



## Identity Stitching

Tie conversations & tasks to external contact data to deliver full customer journey information



## Bulk Updates (cont.)

Support for Bulk update including priority, due\_date, assignee