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Workspace Desktop Edition User's Guide

Monitor Coach And Barge-in Interactions

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Monitor Coach And Barge-in Interactions

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 - 1.5 Switching Team Supervisor Modes

In this lesson, you will learn how a Team Supervisor can monitor, coach, and barge-in on agents who are handling voice and chat interactions:

- Monitoring an agent enables you to hear the interaction between an agent and a contact without either party being able to hear you; or read the chat transcript between an agent and a contact without either party knowing that you are reading the transcript. Agents might be configured to know when they are being monitored (an icon is displayed in the interaction window), or they might be configured to be monitored without their knowledge (silent monitoring).
- You can barge-in to an active voice interaction that you are monitoring between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are monitoring.
- Coaching an agent enables you to hear the interaction between an agent and a contact without the contact being able to hear you coach the agent; or read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent.
- You can barge-in to an active voice interaction that you are coaching between an agent and a contact so that both parties can hear you. You can also barge-in to a chat session that you are coaching.

This lesson contains the following sections:

- [Monitoring a Voice Interaction](#)
- [Coaching a Voice Interaction](#)
- [Monitoring a Chat Interaction](#)
- [Coaching a Chat Interaction](#)
- [Switching Team Supervisor Modes](#)

To use the Team Supervisor functionality, you must be configured as a Supervisor for an agent group.

A Team Supervisor can monitor or coach as many chat agents as he or she want to, but he or she can monitor or coach only one voice agent at a time.

Monitoring a Voice Interaction

Monitoring an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact without the agent or contact being aware that you are listening. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Note: You can monitor only one voice agent at a time.

Lesson: Monitoring an agent who is handling a voice interaction

Purpose:

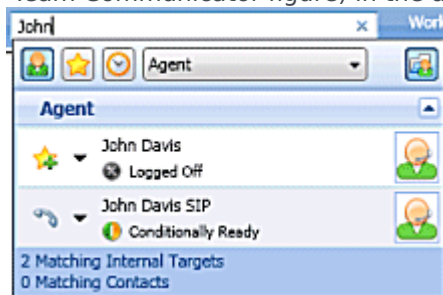
- To listen to an agent and a contact in a voice interaction without the agent or contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

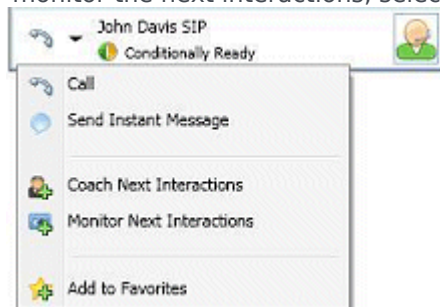
Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



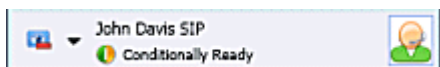
Main Window Team Communicator

2. Open the Action Menu for the agent whom you want to monitor and select Monitor Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Monitor menu; to monitor the current interaction, select it from the Monitor menu. To monitor the next interactions, select Next Interactions.



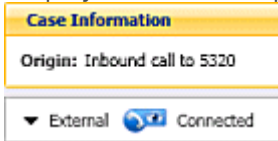
Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are monitoring changes to the Stop Monitoring button.



3. When the monitored agent accepts a voice interaction, a notification is displayed on your desktop. Click Accept to begin monitoring the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. Neither the contact nor the agent can hear you, but you can hear both parties. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click Accept, you will begin monitoring the call that is already in progress. If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is

displayed next to the party-interaction icon in the Voice Interaction window on the agent's desktop.



The same icon is displayed in the Voice Interaction Monitoring window on your desktop next to the party Action menu.



4. During a monitoring session, you can perform the following actions from the Voice Interaction Monitoring window:

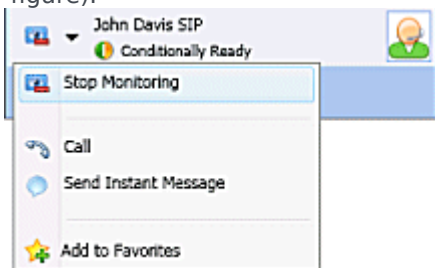
- End Monitoring--Click End Monitoring (🔴) in the Supervisor controls of the Call Actions toolbar to end the monitoring session.
- Barge-in--Click Barge-in (👤) in the Supervisor controls of the Call Actions toolbar to join the monitored call. Both parties will be able to hear you. You can switch back to monitoring by clicking End the Call (🔴) in the Call Actions toolbar.
- Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent whom you are monitoring by sending instant messages to them (see [Handle Internal Instant Messaging](#)).
- Coach via voice--Select Coach via voice from the agent party Action menu, or use Unmute (Coach) (🔊) in the Interaction toolbar to return to coaching.

For more information, see [Lesson: Coaching an agent who is handling a voice interaction](#).

If you stopped monitoring, you are disconnected from the call. The monitoring-indicator icon is removed from the Voice Interaction window of the agent.

If the agent ends the call while you are still monitoring the agent, your monitoring session ends automatically.

5. Click Done to close the Voice Interaction Monitoring window and mark the interaction as Done.
6. To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
7. Open the Action Menu for the agent ,and select Stop Monitoring (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End

Coaching a Voice Interaction

Coaching an agent who is handling an interaction means that you can listen to a voice interaction between an agent and a contact and speak to that agent without the contact being aware that you are listening and speaking to the agent. You can coach the current or next interaction of an agent.

Lesson: Coaching an agent who is handling a voice interaction

Purpose:

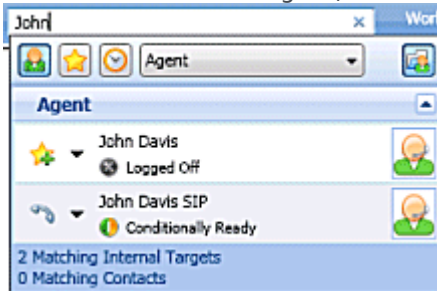
- To listen and speak to an agent who is handling a voice interaction without the contact being able to hear you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Voice channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

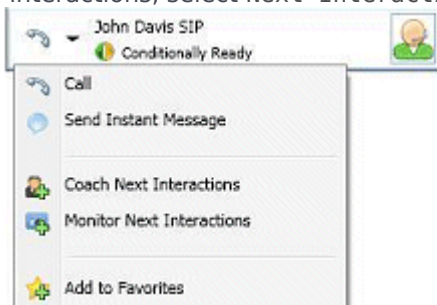
Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

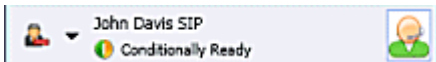
2. Open the Action Menu for the agent whom you want to coach and select Coach Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Coach menu; to coach the current interaction, select it from the Coach menu. To coach the next interactions, select Next Interactions.



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are coaching changes to the Stop

Coaching button.





- When the coached agent accepts a voice interaction, a notification is displayed on your desktop. Click Accept to begin coaching the interaction. The Voice Interaction Monitoring window is displayed on your desktop and you are connected to the call. You can hear the agent and the agent can hear you, but the contact can hear only the agent. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click Accept, you will begin coaching the call that is already in progress.

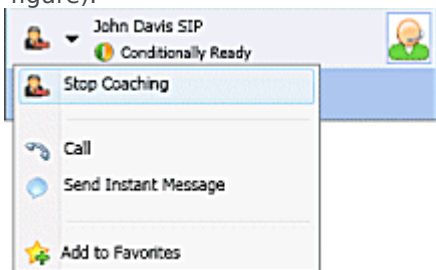
The eye icon is displayed in the Voice Interaction Coaching window on your desktop next to the party Action menu.



- During a coaching session, you can perform the following actions from the Voice Interaction Coaching window:

- End Monitoring--Click End Monitoring () in the Supervisor controls of the Call Actions toolbar to end the coaching session.
- Mute (Monitor)--You can switch to monitoring the call by clicking Mute (Monitor) () in the Call Actions toolbar.
- Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Voice Interaction window. You can coach the agent that you are coaching by voice by sending instant messages to that agent (see [Handle Internal Instant Messaging](#)).
If you stopped coaching, you are disconnected from the call.
If the agent ends the call while you are still coaching the agent, your coaching session ends automatically.

- Click Done to close the Voice Interaction Coaching window and mark the interaction as Done.
- To stop coaching the agent, use the Team Communicator to find the agent whom you are coaching.
- Open the Action Menu for the agent and select Stop Coaching (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End

Monitoring a Chat Interaction

Monitoring an agent who is handling an interaction means that you can read a chat interaction between an agent and a contact without the agent or contact being aware that you are reading the interaction. Agents can be configured to be notified when they are being monitored. You can monitor the current or next interaction of an agent.

Lesson: Monitoring an agent who is handling a chat interaction

Purpose:

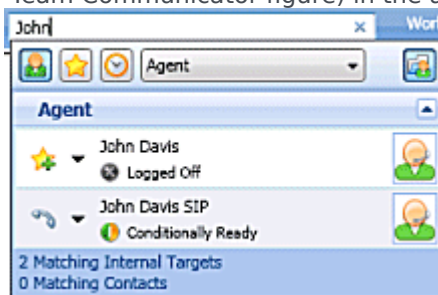
- To read the live transcript between an agent and a contact in a chat interaction without the agent or contact being aware of you.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

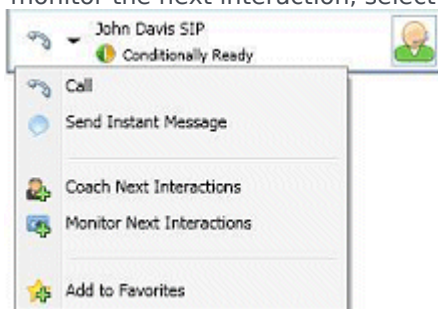
Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



Main Window Team Communicator

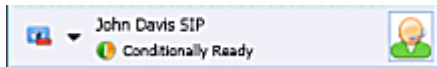
2. Open the Action Menu for the agent whom you want to monitor and select Monitor Next Interactions (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Monitor menu; to monitor the current interaction, select it from the Monitor menu. To monitor the next interaction, select Next Interactions.



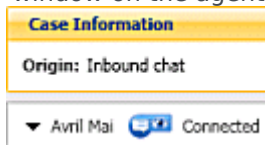
Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has started for the

selected agent. In the Team Communicator, the Action Menu for the agent whom you are monitoring changes to the Stop Monitoring button.



- When the monitored agent accepts a chat interaction, a notification is displayed on your desktop. Click Accept to begin monitoring the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript, but you cannot send any text to the contact or the agent. If you do not click Accept, the notification will be dismissed automatically, and you will not be able to monitor the interaction unless you stop monitoring and start monitoring the same agent. If the agent is already handling an interaction when you start monitoring, a notification is displayed immediately. If you click Accept, you will begin monitoring the chat that is already in progress. If the monitored agent is configured to be notified when he or she is being monitored, an eye icon is displayed next to the party-interaction icon in the Chat Interaction Monitoring window on the agent's desktop.

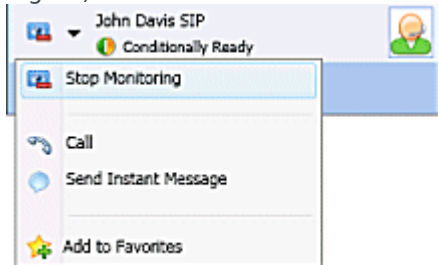


The same icon is displayed in the Chat Interaction Monitoring window on your desktop next to the party Action menu.



- During a monitoring session, you can perform the following actions from the Chat Interaction Monitoring window:
 - End Monitoring--Click End Monitoring (🛑) in the Supervisor controls of the Call Actions toolbar to end the monitoring session.
 - Barge-in--Click Barge-in (👤) in the Supervisor controls of the Call Actions toolbar to join the monitored chat session. Both parties will be able to see your messages. You can switch back to monitoring by clicking End Chat (🛑) in the Call Actions toolbar.
 - Coach via Instant Messaging--Select Coach via Instant Messaging from the agent party Action menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending instant messages to the agent (see [Handle Internal Instant Messaging](#)).
 - Coach via voice--Select Coach via Voice from the agent party Action menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see [Making a Voice Call](#)).
 - Coach via chat--Select Coach via Chat from the agent party Action menu. A chat session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by sending chat messages to the agent (see [Starting or Receiving a Chat Consultation](#)). If you stopped monitoring, you are disconnected from the chat session. The monitoring indicator icon is removed from the Chat Interaction window of the agent. If the agent ends the chat session while you are still monitoring the agent, your monitoring session ends automatically.
- Click Done to close the Chat Interaction Monitoring window and mark the interaction as Done.
- To stop monitoring the agent, use the Team Communicator to find the agent whom you are monitoring.
- Open the Action Menu for the agent and select Stop Monitoring (see the Internal Target Action Menu

figure).



Internal Target Action Menu

A system message is displayed that informs you that monitoring of interactions on your configured channels has ended for the selected agent.

End

Coaching a Chat Interaction

Coaching an agent who is handling an interaction means that you can read the transcript of the interaction between an agent and a contact and send chat messages to the agent without the contact being aware that you are reading the transcript and communicating with the agent. You can coach the current or next interaction of an agent.

Lesson: Coaching an agent who is handling a chat interaction

Purpose:

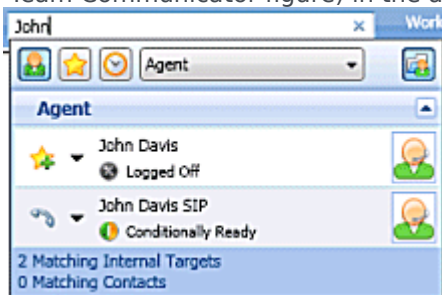
- To read the chat transcript and send messages to an agent who is handling a chat interaction without the contact knowing that you are reading the transcript and communicating with the agent.

Prerequisites

- You are configured as a Supervisor for an agent group.
- You are logged in to a Chat channel in Interaction Workspace (see [Lesson: Logging in to Interaction Workspace](#)).

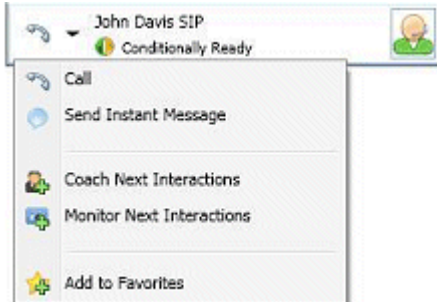
Start

1. Use the Team Communicator in the Main Window or Gadget to find an agent (see the Main Window Team Communicator figure) in the agent group to which you have been assigned as a Supervisor.



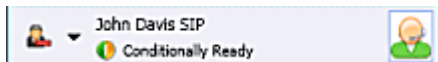
Main Window Team Communicator

2. Open the Action Menu for the agent whom you want to coach and select **Coach next interactions** (see the Internal Target Action Menu figure). If there is a currently active interaction, it is displayed in the Coach menu; to coach the current interaction, select it from the Coach menu. To coach the next interaction, select **Next Interactions**.

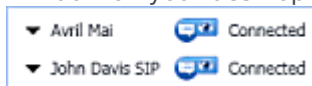


Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has started for the selected agent. In the Team Communicator, the Action Menu for the agent whom you are coaching changes to the Stop Coaching button.



3. When the coached agent accepts a chat interaction, a notification is displayed on your desktop. Click **Accept** to begin coaching the interaction. The Chat Interaction Monitoring window is displayed on your desktop and you are connected to the chat session. You can read the chat transcript and send private chat messages to the agent without the contact seeing your messages. If you do not click **Accept**, the notification will be dismissed automatically, and you will not be able to coach the interaction unless you stop coaching and start coaching the same agent. If the agent is already handling an interaction when you start coaching, a notification is displayed immediately. If you click **Accept**, you will begin coaching the chat session that is already in progress. The eye icon is displayed in the Chat Interaction Coaching window on your desktop next to the party Action menu.



4. During a coaching session, you can perform the following actions from the Chat Interaction Coaching window:

- End Monitoring--Click End Monitoring (✖) in the Supervisor controls of the Call Actions toolbar to end the coaching session.
- Barge-in--Click Barge-in (👤) in the Supervisor controls of the Call Actions toolbar to join the monitored chat session. Both parties will be able to see your messages. Your coaching session ends when you barge-in to the chat.

Click **Done** to close the coaching session in the window and mark the coaching interaction as **Done**. You can switch to monitoring the chat session (see [Monitoring a Chat Interaction](#)) by clicking **End Chat** (✖) in the Call Actions toolbar.

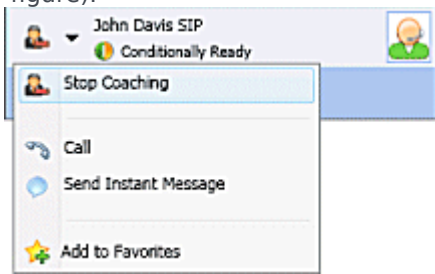
- Coach via voice--Select **Coach via Voice** from the agent party Action menu. An voice session is added to the Chat Interaction window. You can coach the agent whom you are monitoring by speaking directly to the agent (see [Making a Voice Call](#)).
- Coach via Instant Messaging--Select **Coach via Instant Messaging** from the agent party Action menu. An Instant Messaging session is added to the Chat Interaction window. You can coach the agent whom you are coaching by chat by sending instant messages to that agent (see [Handle](#)

Internal Instant Messaging).

If you stopped coaching, you are disconnected from the chat session.

If the agent ends the chat session while you are still coaching the agent, your coaching session ends automatically.

5. Click Done to close the Chat Interaction Coaching window and mark the interaction as Done.
6. To end coaching the agent, use the Team Communicator to find the agent whom you are coaching.
7. Open the Action Menu for the agent and select Stop Coaching (see the Internal Target Action Menu figure).



Internal Target Action Menu

A system message is displayed that informs you that coaching of interactions on your configured channels has ended for the selected agent.

End

Switching Team Supervisor Modes

Interaction Workspace enables you to switch from certain team-supervision modes to others.

During the monitoring or coaching of an active interaction, you can switch from one supervision mode to another. The following transitions are supported:

- Monitoring to coaching--Use the party Action menu that is associated with the agent, or Use Unmute (Coach) in the Interaction toolbar to return to coaching.
- Monitoring to barge-in--Click Barge-in in the Supervision bar.
- Coaching to barge-in--Click Barge-in in the Supervision bar.
- Coaching to monitoring--Click End Chat, End Call, or End IM in the Interaction toolbar of the coaching interaction to return to monitoring, or Mute (Monitor) in the Interaction toolbar to return to monitoring.
- Barge-in to monitoring--Click End Call or End Chat in the Interaction toolbar to return to monitoring.
- Barge-in to coaching--Use the party Action menu that is associated with the agent.

Note: Depending on the technical environment of your voice channel, some voice specific supervisor switching-modes might not be available, for example:

- Switching from coaching to barge-in might not be possible.

- Switching from monitoring to barge-in might not be possible.