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Genesys Engage cloud Administrator's Guide

Stage 4: Monitoring a campaign

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Stage 4: Monitoring a campaign

- **Monitoring**

Harry has set up and run his campaign and sub-campaign. Now it needs to be monitored. This is where Lucy, the manager of Golden Gate Communications, comes in. Lucy is interested in two things: real-time reports of the campaign while it's running and historical reports of the campaign once it ends.

Real-time reports (Engage)

Scenario: Lucy wants to ensure her agents are meeting the campaign goal, which is to reach 120 customers each day of the campaign. To assess if her agents are on track, she wants to keep track of call results each day of the campaign.

Solution: To monitor the status of an ongoing campaign in real-time, Lucy can use the **Engage** dashboard for a snapshot of call results.

[+] Instructions

Engage reports

List					Attempts	
					Done	Remain

1. Go to **Account Manager**, and on the **Campaigns** page, the dashboard will show real-time results of the campaign, as follows:

- List columns
 - **Filtered**—The number of contacts filtered from the list.
 - **Delivered**—The number of successful contact attempts.
 - **Retrying or Failed**—The number of contacts being retried or with a current failure status.
 - **Not Attempted**—The number of contact attempts remaining.
- Attempts columns
 - **Done**—The total number of contact attempts made.
 - **Remain**—The number of contact attempts remaining to be made.

Real-time reports (Genesys Pulse)

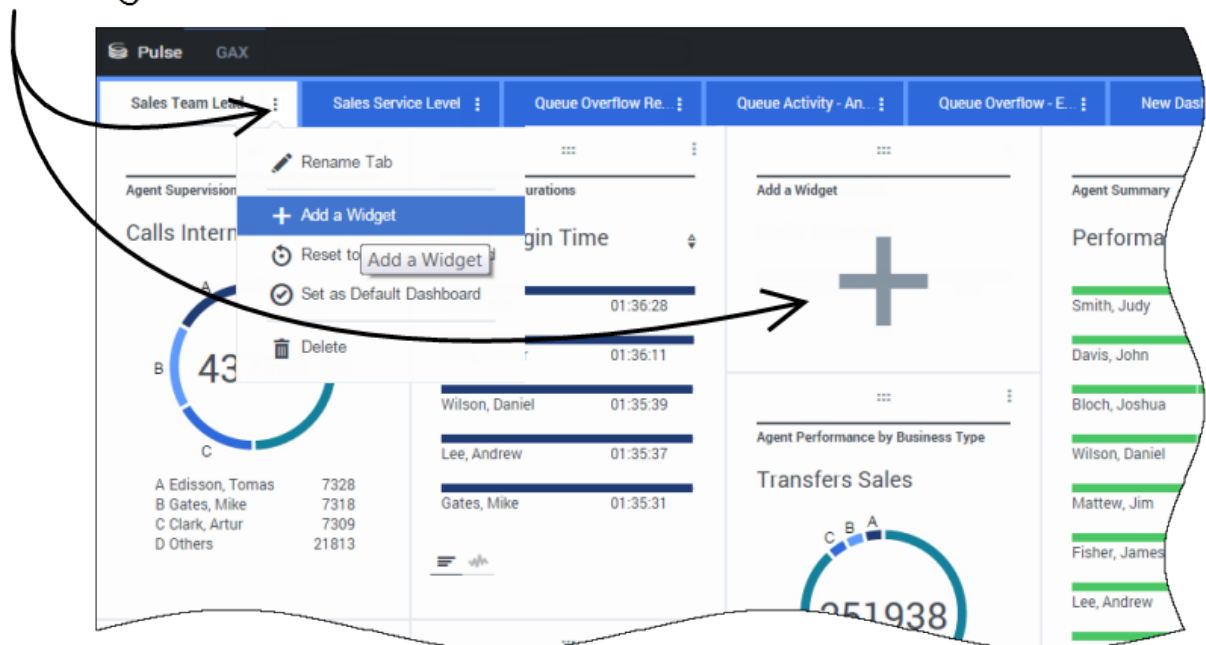
Scenario: Lucy has just hired five new agents, including Martha, and wants to track the number of customers they're talking to each day of the campaign.

Solution: Lucy can use **Genesys Pulse** to view agent activity. Lucy will sign in to **Genesys Pulse** and go to her dashboard. She'll add a **report widget** to her dashboard, select the **template and objects or statistics**, and specify **default display settings** – like the name, refresh rate, and type of widget.

[+] Add a report widget

Add a report widget

add a widget



There are two options for adding a report widget:

1. Click the more icon in the right corner of the dashboard and click **Add a Widget**.
2. Click the **Add a Widget** icon on the dashboard. **Genesys Pulse** opens a widget wizard to help you add a report

[+] Add a template and add objects or statistics

The template wizard guides you through the process of creating, changing, and deleting templates. To open the template wizard:

1. Click **Add Widget**
2. Select **New Template**. The **Choose a Widget** screen displays an alphabetical list of **Genesys Pulse** templates.

To create a **Genesys Pulse** template, you must add or configure:

- One or more object types.
- One or more statistics.
- One widget type with specific options to display the information.

On the **Details** screen:

1. Define the name of the new template
2. Describe the scope of this template
3. Select one or more object types from the selection based on what you might want to monitor.

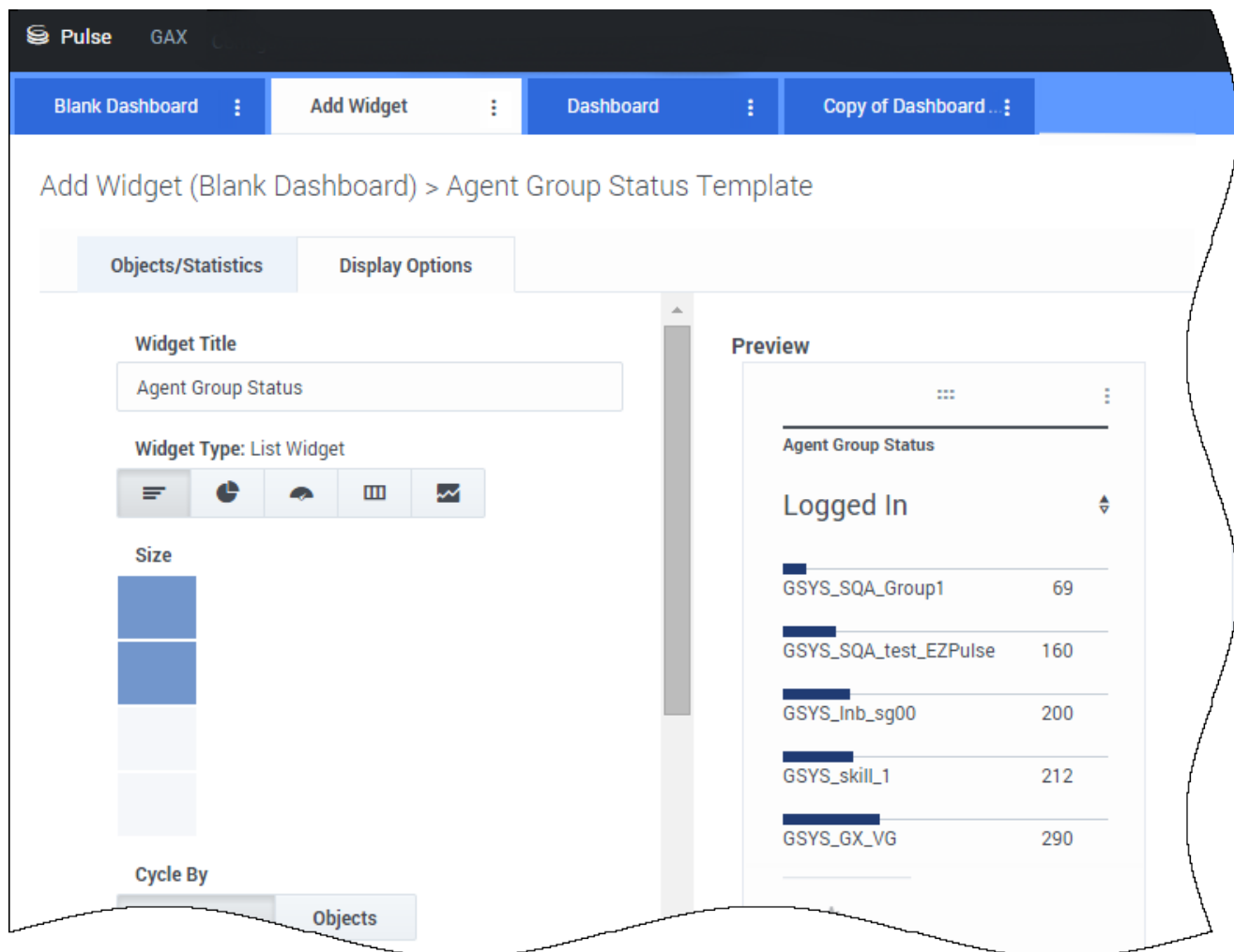
Genesys Pulse allows you to select objects that are compatible with your template. For example:

- The **Agent KPI** template includes the **Agent**, **Agent Group**, **Place**, and **Place Group** objects.
- The **Agent Group Status** template includes the **Agent Group** and **Place Group** objects.

Select the statistics and properties to include in your template. **Genesys Pulse** statistics are described in detail in the [templates.xls](#) file. You must add at least one non-string statistic.

[+]Select default display settings

Display options



The final step before validating your template is to define what should be the default display of your widget on the main dashboard. This setting is the one displayed to **Genesys Pulse** users, but they can then modify the widget options on their own dashboard. Name the widget title

1. Select the **Widget Type** to display.
2. Select the Widget refresh rate.
3. Select options associated with the visualization (for example, thresholds and size).
4. If needed, select the statistics for alerts and define the alert values (from 1 to 3).

The agents' activity will display in the form of a grid, KPI, line chart, or list. Lucy can save and download the report data as a CSV file.

Historical reports

Scenario: The campaign has ended and G-Tel has asked Lucy for the results so that they can determine if the campaign was worth the investment.

Solution: Lucy can use either **Engage** to run an account, campaign, or sub-campaign summary or detail report, as described [here](#), or she can use **Genesys CX Insights** to run Outbound Engagement reports, as described below.

Campaign Callbacks Summary report

Campaign Callbacks Summary Report								
Tenant	Campaign	Day	Callbacks Completed	Callbacks Missed	Callbacks Scheduled	Personal Callbacks Completed	Personal Callbacks Missed	Personal Callbacks Scheduled
Environment	C_2275.June_1_1.1550C7CA95714B38F0A14017200000000000	2016-06-01	0	0	0	0	0	0
	C_2275.June_1_2.1550C88360A14C6100A14017200000000000	2016-06-01	0	0	0	0	0	0
	C_2275.May_25_1.154E7F0364D5B51430A14017200000000000	2016-05-25	0	0	0	0	0	0
	C_2275.May_27_1.154F21604BC0C07550A14017200000000000	2016-05-27	0	0	0	0	0	0
	Total		0	0	0	0	0	0
Total			0	0	0	0	0	0

The Campaign Callbacks Summary report summarizes the total number of callbacks processed by the contact center, breaking them down into the total number scheduled, missed, and completed for each day of the reporting period and distinguishing personal callbacks from non-personal ones.

Campaign Summary report

Campaign Summary Report											
Tenant	Campaign	Day	Attempts	Accepted	Not Accepted	Abandoned Waiting	Busy Campaign	No Signal	Dial Dropped	Answered	Unanswered
Environment	C_2275.June_1_1.1550C7CA95714B38F0A14017200000000000	2016-06-01	3	0	0	2	0	0	0	0	0
	C_2275.June_1_2.1550C88360A14C6100A14017200000000000	2016-06-01	1	1	0	0	0	0	0	0	0
	C_2275.May_25_1.154E7F0364D5B51430A14017200000000000	2016-05-25	2	2	0	0	0	0	0	0	0
	C_2275.May_27_1.154F21604BC0C07550A14017200000000000	2016-05-27	1	1	0	0	0	0	0	0	0
	Total		7	4	0	2	0	0	0	0	0

Campaign Summary Report												
Accepted	Not Accepted	Abandoned Waiting	Busy Campaign	No Signal	Dial Dropped	Answering Machine Detected	Fax Modem Detected	Overdial	Avg CPD Dial Time (Fmt)	Avg CPD Transfer Time (Fmt)	Avg CPD Time (Fmt)	
0	0	2	0	0	0	1	0	2	00:12.420	00:00.000	00:01.521	
1	0	0	0	0	0	0	0	1	00:13.285	00:03.713	00:02.057	
2	0	0	0	0	0	0	0	2	00:11.538	00:04.553	00:02.606	
1	0	0	0	0	0	0	0	1	00:14.932	00:05.109	00:02.020	
7	4	0	2	0	0	1	0	6	00:12.650	00:04.458	00:02.055	
			0	0	0				00:12.650	00:04.458	00:02.055	

The Campaign Summary report provides several key measures generated by Outbound campaigns that summarize the disposition of contact attempts to reach customers over the reporting interval. The Summary tab, in bar chart format, focuses on two of those key measures: Accepted and Not Accepted.

Contact List Effectiveness report

Contact List Effectiveness Report												
Tenant	Contact List	Day	SIT Ratio	Attempts	All SIT	SIT Detected	SIT Invalid Number	SIT No Circuit	SIT Operator Intercept	SIT Reorder	SIT Unknown	SIT Vacant
Environment	gsw_calling_list	2016-05-25	0.00%	2	0	0	0	0	0	0	0	0
		2016-05-27	0.00%	1	0	0	0	0	0	0	0	0
		2016-06-01	0.00%	4	0	0	0	0	0	0	0	0
	Total		0.00%	7	0	0	0	0	0	0	0	0
			0.00%	7	0	0	0	0	0	0	0	0

The Contact List Effectiveness report provides the number of contact attempts that were generated by an Outbound campaign, the ratio of attempts that resulted in the detection of a special information tone (SIT), and a breakdown of the call results of those SIT-detected attempts for the

Stage 4: Monitoring a campaign

selected calling list. The Summary tab of this report plots, in bar chart format, the SIT ratio for each calling list.

Agent Outbound Campaign report

Agent Outbound Campaign Report				
Tenant	Agent Name	Campaign	Business Result	Day
Environment	Sqa_15556667777_2275, Sqa_15556667777_2275 (Sqa_15556667777_2275)	C_2275.June_1_2.1550C88360A14C6100A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-06-01
		C_2275.May_25_1.154E7F0364D5B51430A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-25
		C_2275.May_27_1.154F21604BC0C07550A14017200000000000	DEFAULT_BUSINESS_RESULT	2016-05-27
	Total			
Total				

Agent Outbound Campaign Report											
Campaign	Business Result	Day	Avg Handle Time (Fmt)	Engage Time (Fmt)	Avg Engage Time (Fmt)	Hold Time (Fmt)	Avg Hold Time (Fmt)	Wrap Time (Fmt)	Avg Wrap Time (Fmt)	Preview Time (Fmt)	Avg Preview Time (Fmt)
360A14C6100A140172000000000000	DEFAULT_BUSINESS_RESULT	2016-06-01	00:00:07	00:00:07	00:00:07	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
64D5B51430A1401720000000000000	DEFAULT_BUSINESS_RESULT	2016-05-25	00:00:25	00:00:50	00:00:25	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
04BC0C07550A140172000000000000	DEFAULT_BUSINESS_RESULT	2016-05-27	00:00:14	00:00:14	00:00:14	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
			00:00:18	00:01:11	00:00:18	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00
			00:00:18	00:01:11	00:00:18	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00	00:00:00

The Agent Outbound Campaign report provides total and average duration of call handling activities for agents who participate in Outbound campaigns.

Want to learn more?

- [Genesys CX Insights Outbound Contact reports and Agent Outbound Campaign Report](#)
- [Get Started with Genesys CX Insights Historical Reporting](#)
- [Get Started with Pulse Real-time Reporting](#)