User management and Org hierarchy User interviews - Notes

Following are detailed notes of user interviews focused on the user management and org hierarchy problem area. Use this doc for reference and idea generation.

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The notes are color coded to indicate if a statement is a pain point, mild pain point, idea or an insight. An insight can be a revelation or important information. Most interviews have a recording attached for reference.

Reach out to Akshay Kore if you have any questions?

Index - List of interviews

Pain point | Insight | Idea | Mild pain

Phil Wang - 1

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It’s very manual. Requires them to reach out to OAI to upload files into the system to create new users.

Have to manually process all new user requests every single time for each customer.

CS team did not want to take this on.

It is not difficult, it is very manual and laborious.

Two roles: Phil’s team does the initial setup of users and teams. Steven’s team takes up ongoing management.

Teams is something that you have to manually assign using the UI in the system.

“Instances right once you like if you're managing a team of like 100 probably not a big deal to go in there manually assign teams and update them as needed, but when we talked about the concentrix says, are the Blocks of the world that have thousands of users, it is extremely laborious.”

They have to do it for every user manually.

“My team of 10 CSEs had to manually add 7000 users and assign it to teams.”

300 users /hour

Built a separate internal tool for OAI

Asking customers to do this much data entry / manual work is a hard pill to swallow.

Can only add 20 users at a time.

You can’t search by the ID of user. You can only search by name. This is especially problematic when there are multiple users with the same name.

Find and add users is a big painpoint.

There is a customer expectation that these types of processes should be done in bulk and they should have control over it. 💥💥

Most enterprise customers expect some type of user sync process that automates the entire thing.

99% of clients will be able to leverage user sync.

“generally most customers would least expect that you have like a user file exchange process that do this automatically.”
“The only scenario where I have found this not to be true, is for the very, very small customers right, but you know we're talking about like the 25 see.”

The urgency to automate is with large customers.

Processing reports: what went well, what didn’t. Success/failure of users, calls ingested, etc. We don’t do this well. Give them some information to troubleshoot

How to communicate reports/changes to clients:
Not every admin needs the report. But some admins need it for sure.

Every contact center has a hierarchy. Issue with OAI is that we limit them to one team.

There are no multiple hierarchies in a team structure on OAI.

Some systems hold this hierarchy. Some don’t. They have to recreate the hierarchy.

High cost of OAI doing it.

Pain point | Insight | Idea | Mild pain

Phil Wang - 2

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		B	C	D	E	F	G	H	I	J
3	e to Access	Employee ID	First Name	Last Name	Role in CxQI Platform	Email Address	Does user need Dashboard access?	Enable	Default Team	Teams
4	ereo-prod	100440480	Andre	Anayatin	QA Analyst	andre.anayatin@concentrix.com	TRUE	TRUE	TRUE	Joseph Galauran,Mykah Ahira Agor,Domminic Kaezar Calma,J
5	ereo-prod	101018396	Fatima Digna	Fabian	QA Analyst	fatimadigna.fabian@concentrix.com	TRUE	TRUE	TRUE	Mykah Ahira Agor,Domminic Kaezar Calma,Joshua Manalansa
6	ereo-prod	100718468	Josette Wilfred	Sta Rosa	QA Analyst	josettewilfred.starosa@concentrix.com	TRUE	TRUE	TRUE	Princess joy Escoto,Rendito Faustino,Christian Sanchez,Maria
7	ereo-prod	100766936	Daryll	Fagarang	QA Analyst	daryll.fagarang@concentrix.com	TRUE	TRUE	TRUE	Gerard Francisco,Saturnino Laluan,Cynthia Ramos,Daryll Faga
8	ereo-prod	101069610	Ma. Kristine	Manalili	QA Analyst	kristine.manalili@concentrix.com	TRUE	TRUE	TRUE	Kim Ryu Ramcy Jimenez,Pauline Dizon,Rocelle Culala,Karl Je
9	ereo-prod	100472768	George Benson	Reyes	QA Analyst	georgebenson.reyes@concentrix.com	TRUE	TRUE	TRUE	George Benson Reyes,Andre Anayatin
10	ereo-prod	236582	Lady Lou	De Guzman	QA Analyst	ladylou.deguzman@concentrix.com	TRUE	TRUE	TRUE	Lady Lou De Guzman,Andre Anayatin
11	ereo-prod	100706945	Joseph	Galauran	QA Analyst	joseph.galauran@concentrix.com	TRUE	TRUE	TRUE	Joseph Galauran,George Benson Reyes,Andre Anayatin
12	ereo-prod	101091734	Boyong Christopher	Cruz	QA Analyst	boyongchristopher.cruz@concentrix.com	TRUE	TRUE	TRUE	Boyong Christopher Cruz,Andre Anayatin
13	ereo-prod	101118005	Josephine	Yanos	QA Analyst	josephine.yanos@concentrix.com	TRUE	TRUE	TRUE	Josephine Yanos,Andre Anayatin
14	ereo-prod	101110881	Roger Don	Querida	QA Analyst	rogerdondon.querida@concentrix.com	TRUE	TRUE	TRUE	Roger Don Querida,Andre Anayatin
15	ereo-prod	101240075	Coleen	Dy	QA Analyst	coleen.dy@concentrix.com	TRUE	TRUE	TRUE	Coleen Dy,Andre Anayatin
16	ereo-prod	101238410	Mykah Ahira	Agor	Supervisor	mykahahira.agor@concentrix.com	TRUE	TRUE	TRUE	Mykah Ahira Agor,Fatima Digna Fabian,Andre Anayatin
17	ereo-prod	101094328	Domminic Kaezar	Calma	Supervisor	domminickaezar.calma@concentrix.com	TRUE	TRUE	TRUE	Domminic Kaezar Calma,Fatima Digna Fabian,Andre Anayatin
18	ereo-prod	101273169	Joshua	Manalansan	Supervisor	joshua.manalansan@concentrix.com	TRUE	TRUE	TRUE	Joshua Manalansan,Fatima Digna Fabian,Andre Anayatin
19	ereo-prod	101240092	Chrismar	Micua	Supervisor	chrismar.micua@concentrix.com	TRUE	TRUE	TRUE	Chrismar Micua,Fatima Digna Fabian,Andre Anayatin
20	ereo-prod	101309606	Francis Ian	Valondo	Supervisor	francisian.valondo@concentrix.com	TRUE	TRUE	TRUE	Francis Ian Valondo,Fatima Digna Fabian,Andre Anayatin
21	ereo-prod	101418389	Noel	Villarosa	Supervisor	noel.villarosa@concentrix.com	TRUE	TRUE	TRUE	Noel Villarosa,Fatima Digna Fabian,Andre Anayatin
22	ereo-prod	841595	Gerard	Francisco	Supervisor	gerard.francisco@concentrix.com	TRUE	TRUE	TRUE	Gerard Francisco,Daryll Fagarang,Andre Anayatin
23	ereo-prod	101148654	Saturnino	Laluan Jr	Supervisor	saturnino.laluanjr@concentrix.com	TRUE	TRUE	TRUE	Saturnino Laluan,Daryll Fagarang,Andre Anayatin
24	ereo-prod	101238366	Cynthia	Ramos	Supervisor	cynthia.ramos@concentrix.com	TRUE	TRUE	TRUE	Cynthia Ramos,Daryll Fagarang,Andre Anayatin
25	ereo-prod	101335597	Cariza Joy	Santos	Supervisor	carizajoy.santos@concentrix.com	TRUE	TRUE	TRUE	Cariza Joy Santos,Daryll Fagarang,Andre Anayatin
26	ereo-prod	101094755	Princess Joy	Escoto	Supervisor	princessjoy.escoto@concentrix.com	TRUE	TRUE	TRUE	Princess joy Escoto,Josette Wilfred Sta Rosa,Andre Anayatin
27	ereo-prod	101291112	Rendito	Faustino	Supervisor	rendito.faustino@concentrix.com	TRUE	TRUE	TRUE	Rendito Faustino,Josette Wilfred Sta Rosa,Andre Anayatin
28	ereo-prod	101691718	Christian	Sanchez	Supervisor	christian.sanchez@concentrix.com	TRUE	TRUE	TRUE	Christian Sanchez,Josette Wilfred Sta Rosa,Andre Anayatin
29	ereo-prod	100372581	Maria Cecilia	Ramos	Supervisor	mariacecilia.ramos@concentrix.com	TRUE	TRUE	TRUE	Maria Cecilia Ramos,Josette Wilfred Sta Rosa,Andre Anayatin

HOW TO | Addition | Modification | Deletion | Instances | Agent-Sup | OM | SOM

What they want to be able to give is, here's all the users in the system. Can we ingest these?

"it is a painful process because effectively, I have to take 20 of these files every week. And then transform them in a way, where I can upload the file, as well as like remove all the old teams added all the new team so it's very painful takes a lot of time."

"because this is so complicated I actually haven't been able to tell my team, how to do this."

Does several Vlookups, VBA script to find and replace for all teammates.

Sometimes they have 20 teams they want to assign to one user.

“I had to write a VBA script that basically create a mapping table of all the teams all the unique ids and then replace everything in all of these columns with that and this one only has 300 users right, but some of these have like 1500 2000 users”
“We have to do a lot of final replaces to get them correct and if they have a typo in some of these right it's it's hard for me to also find those out.”

“it's really hard with like the error tracking etc as well, but I would say, for 20 it generally can take like i've built my process now for myself at least to be able to do them I had about.”

“20 to 30 minutes each and if you multiply that by 20 rate, you can see how much time that would take me alone on a weekly basis.”

10 hours/ week just for CnX one account. CnX has 20 accounts
This will go up.

“the process, I have is they send me all these teams, based on their latest one and I have to first take this list. Make it into a unique list and then compare it to all the teams that we had in the system today to find which of those are missing, and then create all the missing ones, and then be able to do this and that's why it's so arduous.”

Will like a process that will create new teams if needed.

Medallia: They had a process of building an actual hierarchy of the system which they called groupings. Each grouping had a unique ID and a display name. They would do UM based off unique IDs.

Ideally we’d like to talk to the HR systems that they have to do the mapping.

Unique IDs help with resolving typo errors

CnX knows that OAI doesn’t have a concept of hierarchy. They are just try fake it by creating multiple teams.

they want to replicate their list of teams from some system to our system.

Biggest thing we need is the ability to update users and move them between teams (maybe in bulk).

The manual process gets more difficult with larger customers like ATT with more than 2000 agents.

File process would be the best (upload a file of all agents and teams)

File process is a stopgap solution. It might be helpful to some users.

Admins send file to OAI (through sftp) -> OAI does processing and updates

File process and bulk upload might not be a universal solution. Some customers will be able to do it. For eg. CnX might be able to do it, but Block may not be.
Because CnX is flexible, but Block has a set rigid format in Workday.

They do it manually themselves, but they complain about it. So OAI hired someone to manually do UM for CnX.

1	workerType	workerSubty	role	managerID	manager	managerEmail	teamCode	costCenter	businessUnit	subBusinessUnit
2	Employee	Regular	agent	20293	Rae DeLaney	rdelaney@squareup.com	QA Individual Contributor	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
3	Employee	Regular	agent	11782	Melissa Stroh	mstroh@squareup.com	PMO Leadership	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
4	Employee	Regular	agent	18605	Antonia Pear	antonia@squareup.com	CCO Risk Operations	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
5	Employee	Regular	agent	26390	David Ross	davidross@squareup.com	CCO Risk Management Team Leads	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
6	Employee	Regular	agent	26390	David Ross	davidross@squareup.com	CCO Risk Management Team	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
7	Employee	Regular	agent	4489	Chris Draper	draper@squareup.com	CCO Risk Management Team	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
8	Employee	Regular	agent	8933	Amanda Flor	aflorez@squareup.com	CCO CERT Team Leads	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
9	Employee	Regular	agent	3275	Tricia Stanfie	tstanfield@squareup.com	Cash - Account Based Reviews	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
10	Employee	Regular	agent	10090	Brandy Wash	bwashington@squareup.com	CCO Disputes	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
11	Employee	Regular	agent	11250	Stephanie Ar	sarendt@squareup.com	Content and Communications Team	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
12	Employee	Regular	agent	19240	Thilye Rinke	thilye@squareup.com	CCO Data Analytics	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
13	Employee	Regular	agent	10890	Dan Donin	ddonin@squareup.com	CCO Business Technology	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
14	Employee	Regular	agent	18606	Lisa Carney	lcarney@squareup.com	CCO Risk Ops Team Leads	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
15	Employee	Regular	agent	23595	Stephen Gre	sgreen@squareup.com	Cash - Disputes	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
16	Employee	Regular	agent	16434	Katie Wapnia	kwapniarski@squareup.com	CCO Specialty Team Leads	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
17	Employee	Regular	agent	8786	Catherine Ca	ccard@squareup.com	CCO Risk Ops Group Leads	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
18	Employee	Regular	agent	9103	Melanie Cox	mcox@squareup.com	Cash- Risk Operations Leadership	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
19	Employee	Regular	agent	26390	David Ross	davidross@squareup.com	CCO Risk Management Team	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
20	Employee	Regular	agent	19240	Thilye Rinke	thilye@squareup.com	CCO Data Analytics	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
21	Employee	Regular	agent	26390	David Ross	davidross@squareup.com	CCO Risk Management Team	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
22	Employee	Regular	agent	4255	Brian Reynos	reynoso@squareup.com	PMO Team	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App
23	Employee	Regular	agent	18605	Antonia Pear	antonia@squareup.com	CCO Risk Operations	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
24	Employee	Regular	agent	4489	Chris Draper	draper@squareup.com	CCO Risk Management Team	30103 Cash App - Risk Operations	Cash (BU)	BUS_Cash App
25	Employee	Regular	agent	8465	Korian Harrin	korian@squareup.com	CCO ERET Team Leads	30208 Cash App - Customer Success	Cash (BU)	BUS_Cash App

Block is moving to Okta

So you may end up doing team names by manager and then you'll they'll have to give you which agents belong report to the managers.

Agents can be moved between heirearchies of managers i.e. manager changes, is promoted, leaves the company.

It would be ideal if we had a historical track of UM changes.

“if I had to say what is ideal, it would be that we have a system in place. Where we both be able to track historically results, so that even if Dan don't then leaves as a manager in the future if I want to filter back down to Dan don't end results I could see his results from whenever he wasn't employee At block, but then going forward right he's no longer a manager and maybe now it's brandi it should be correct that way going forward."

"the ideal state is the agents would map or roll up into these managers appropriately and be at that you know time in place like have the right data presented for them."

CnX is all about manager names as team names. They don't have a team name concept.

"I think we need to be flexible right like, in my experience working with customers, like every customer is going to do it slightly different."

Creating teams is a frequent process. Especially for larger companies.

It is easy to delete teams.

We have been able to some of the cost to our customers. But this is something that would make them unhappy.

Tablestakes, they would expect some sort of a process for this in place.

Customers might be unhappy if we charge them for UM.

"kind of its it's like what they expect like, especially when I was working at medallia like these are all things we did all the time and every customer just assumed, we could manage it automatically"

If we can't automate, their perception of us becomes very poor.

Enterprise customers will assume we can do UM for them.

Flexibility around metadata mapping

Expensive for OAI to do UM manually.

First step for most customers if self-serve. After that they might ask it to be automated.

Will help with retention of customers. It will be cost savings for them since they don't have to hire someone to do UM.

Pain point | Insight | Idea | Mild pain

Lester - Cnx

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New to CnX

Why are there people mapped out to different teams.

It is difficult for the admin to create an accurate mapping from their org structure. This is a current limitation of OAI, so admins end up creating multiple teams.

Multiple teams can have overlaps. For eg. in case of two QAs who have the same manager, the manager's team has all members from the QAs team replicated.

ATT has operations in different geos.

A large BPO will have multiple hierarchies. A senior manager can have 1000 people rolling up to them.

An org based view can help with measuring KPIs of different levels. Eg. the KPI of a supervisor is different from a director.

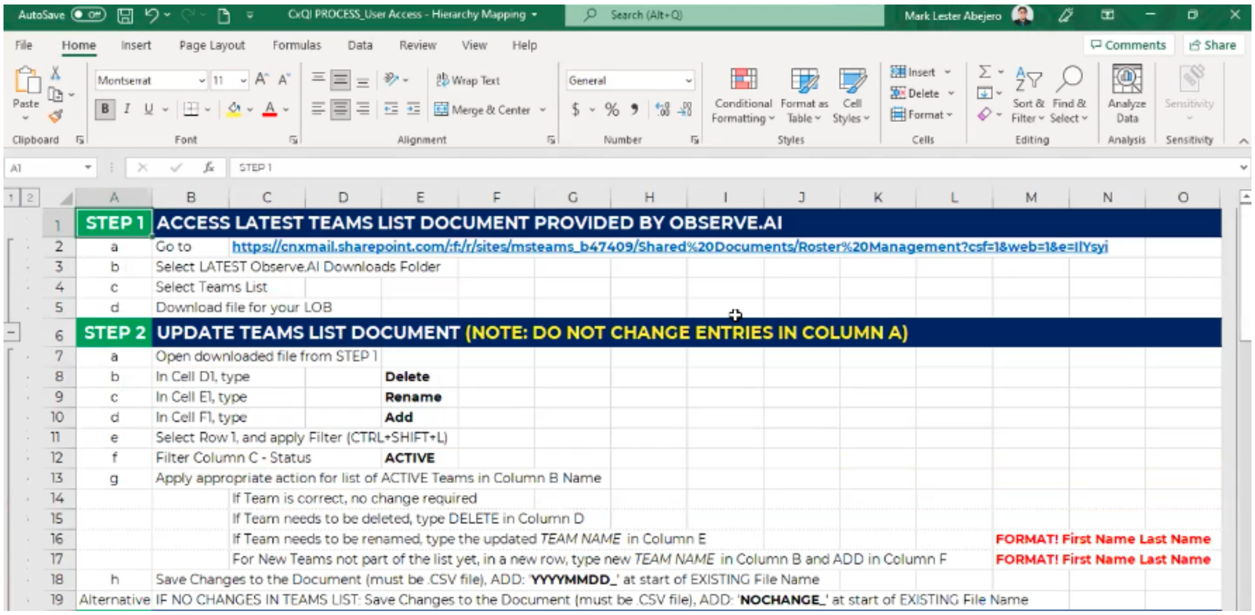
Current way of managing orgs in OAI:

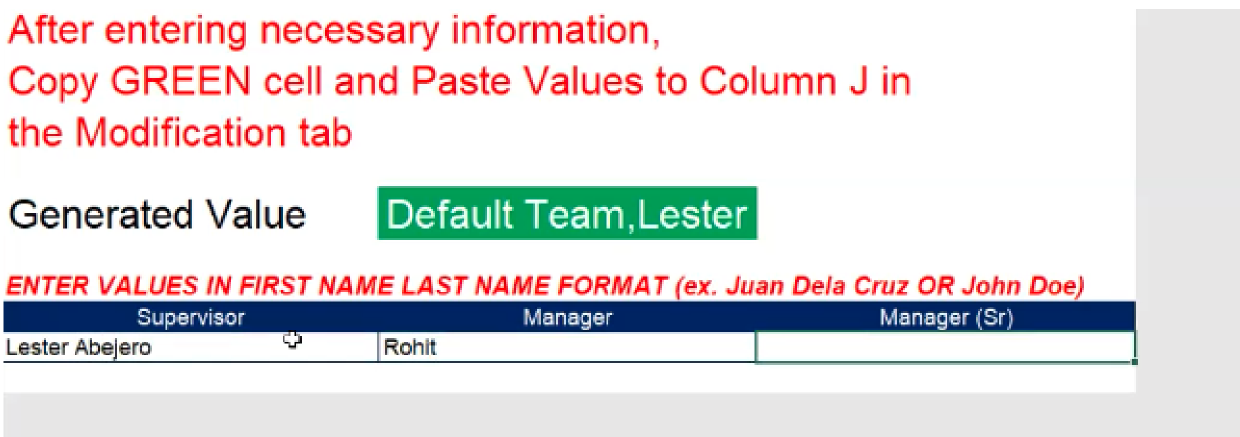
- An agent is a part of minimum 3 teams, supervisor, manager and senior manager.
- A manager will have their own team and team leaders will report to them
- Team leaders will have their own team as an entity.

11:54 - 12:57

They intuitively know whether a team belongs to a team leader or a manager based on the number of people in the team. Eg. around 20 people -> team leader, around 70 people -> manager.

They create their own processes outside OAI to manage users using excel, teams, sharepoint.





These processes are complicated and require significant training.

There are a number of errors that happen during these processes, mainly around typos of user names and team names.

They are building their own process of creating reports from Workday (user roster management platform) and pushing them to an SFTP folder. OAI will then use these files to do UM.

The goal of this is to avoid user errors due to typos and multiple points of contact. They are managing 22 different files for ATT. He's essentially just auditing if they follow the right naming conventions.

Even then, he can't do it for the entire file (some files have more than 1000 entries). He's just doing a sample.

The transfer of knowledge is done from their level on the global side (central team) and different POCs would manage deployment for different regions.
Then the POCs follow the process laid out in templates.

These files are used both for new users and team updates.

They are trying to automate adding new users through a user sync process.

The ideal state would be to automate the team mapping piece.

Users to team association changes weekly. This is a high frequency change.

Currently, POCs don't have the time to update regularly. But if they did, he would be receiving changes on a weekly basis.

Process:
- Start of the week, Admin requests OAI for the most recent mapping.
- They do an audit of user mappings. (they've created a generator for this step, compare with previous records). Tells the what to update, what not.
- Once audit is completed, it is uploaded to a sharepoint folder
- The admin does a few manual check around data formatting.
- Then they submit it to OAI and OAI makes these changes.
- This process takes about a week.

we're actually just downloading the entire team mapping that's available to us.
There is no way of seeing a change in mapping i.e. these agents are with this team now.
There are errors in this process after download. Despite this, the go ahead and triage errors during the process.

During this process:
- New teams can be created.

- New agents can be added.
- Agents can be moved between teams.

Currently, they refresh all the data and recreate teams and agents for simplicity.

Tracking the history of agent updates in the hierarchy is not relevant within OAI.
This type of need hasn't come up and they have not seen it in previous experience.

There is always a delay in the mapping between Workday (user roster software) and OAI. The delay is generally 1 week. This is a major pain point for the admin. 💥💥

“All of the frustration from the users, because at the end of the day, right, I find that be there, I log into that I want to see the information that is related to my team, however, if this week my team has already changed right, and then I am filtering something and then I just realized that hey These are not my agents anymore I just changed my team last week.”

The performance report will not be an accurate representation of my actual teams performance.

“it requires them to manually pull the information for the agents, one by one, instead of having a singular filter that wouldn't work so that they can see the information that gets a scorecard so let's summarize, supposedly for their entire.”

There are other tools that follow the same user hierarchy as their user management software (workday). Eg. Verint

Mapping within Verint gets updated automatically whenever there is a change on Workday. CnX built this mapping on their own using APIs.

However, this automatic mapping is not common. Smaller orgs generally don't have this automatic mapping.

Roles and teams are already defined in Workday and they replicate it on OAI.

There are different naming conventions on how we call a team leader or a manager.

In other UM solutions, there is this inherit team capability, where a team can be easily transferred from one manager to another. If the team has other team leaders, even their agents are seamlessly mapped to the new manager.

Roles and access to tools are independent. A manager can have different levels of tool access.

Access to tools is **not** dependent on the role type.

“I won't be able to make that call because I'm unsure as a manager if this actually represents the trend of my team. it might be something different, and what will happen is that I might call out to focus on offensive language when, in fact, last week, our top opportunity really would be hold time.”

Higher-level > lesser headcount

Site (geolocation) as a way of organizing teams. E.g Mumbai, Manila, etc.

“it requires a lot of human intervention for us before we come up with the roster files right and then It adds another layer that it takes a certain amount of time before those updates can be uploaded and so, by the time that we announced to the team that made updates have been made at that point, it's not already the updated.”

Pain point | Insight | Idea | Mild pain

Stephen - OAI internal support team

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UM requests are the largest number of requests for the support team.
Approx 16%

It has increased since CnX started

Type of request can range from adding one user to a page of 150 new users.
Majority of requests is 1-15 users at a time.

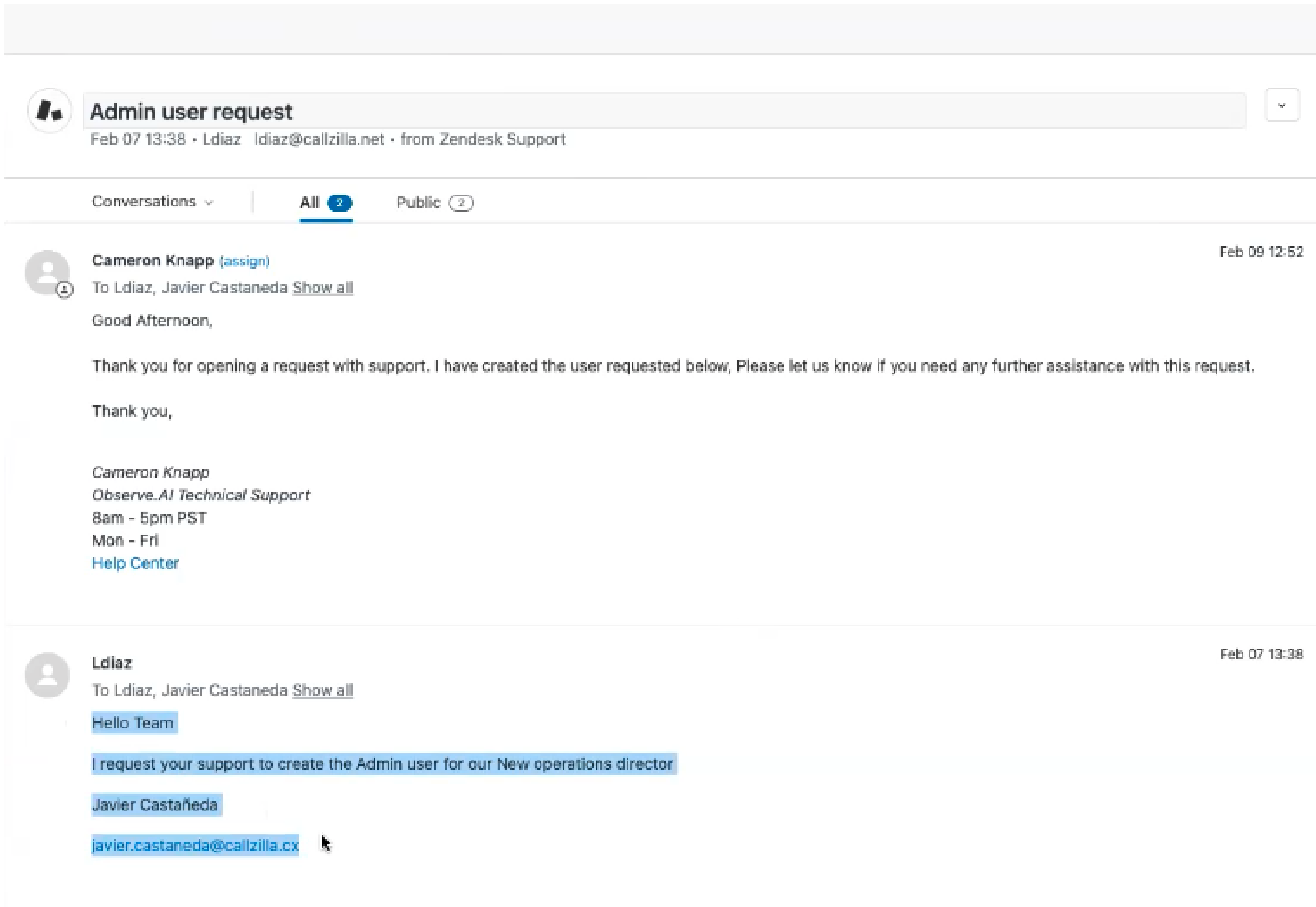
But CnX will send a list of 150 users. It won't just be adding new, but also modifications and deletions.

Majority of UM requests are adding new users. There are some for changing the name.
Deletion is rarest.

New quarter, lot of new users added

There are users added during onboarding - which are handled by the onboarding team.
Sometimes admins are confused and they send these requests to the support team.

Most requests are raised by the customer themselves.



Example request. Check time lag

“the worst case scenario, in my opinion, is when the like a new admin reaches out to us to get themselves added. Which kind of adds like a weird security issue or it's like well, I see that your email as part of the same you know domain as the customer, but I really feel more comfortable this coming from your admin.
Because that it's just like a weird scenario that we have to kind of work around So those are like the two biggest pain points that will take a one touch ticket and make it sometimes last week.”
Such a ticket can take week to fulfil

Different kinds of requests: Admins added, manager and even custom roles.

Agents are often added from metadata

“had one specific use case where they've actually said, you know this process that we currently have is kind of taking too long.”

“sample sheet of what we upload via the dashboard and just like hey if you fill this out and give it to us, we can get it done in the same day are like as soon as we get the ticket”

Deletions is the most complicated type of request.

OAI will have to do one time transformation to ingest agents from metadata.
Or if users send it in a format that OAI recommends.

“One of the main things we run into with it's not super common, but if if they tried to add a user that's disabled in our database it'll give us success, even though it's not being added. The only way we actually know about it is by going into the actual database and looking up disabled users to see that.”

Confirmation of errors is missing in the case of adding disabled users.

Adding a previously disabled users is complicated.
A disabled user does not show up on the dashboard.
Admin expects the disabled user to be enabled when adding.

NDR looked at moving users between teams.

“ it's kind of been a growing issue over the past six months.”

Pain point | Insight | Idea | Mild pain

Assurance - 1

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They have their own UM system and they feed the data to OAI in the metadata when teams change or there are new users.

Use AAD currently. However, not all who use OAI are on AAD

There's an agent change everyday.

It can be new agent or agents moving between teams.

"there's also agents that will be deactivated from the platform that we just want to have removed from certain teams, where we want to keep your information"

Deactivate state is important for them.

Deactivate state is different from delete.

" the construct in terms of the hierarchy, the sales manager with agents under him or her with agents that may be moving in and out and with sales managers that may be moving in and out."

They have created an internal tool for assiginng agents to managers.

They also have a tool called Join where the hierarchy of agents and sales managers is stored.

Many agents are contractors and temporary employees.

Agents might want to move between sales managers.

Managers may get reassigned, promoted, fired or leave the company.
There can be organisational changes where they might get involved in selling a different product type. This would lead to the creation of a new sales team.

Majority of changes are around user and teams association.

They have some requests around adding new employees to OAI, but that is much smaller in comparison to changes in agent assignment.
Approx 1~100-300 changes/week

Pattern: Majority who have access are going to be QA analyst who is viewing the call or a sales leader.

“we would prefer is all of our QA analyst teams were automatically assigned to all of our agents kind of like the default team, but for all of our QA team.”
Change in default team

User to team mapping is highest frequency

‘Is there a way of adding agents without activating them immediately?’

—

Will this be something that they will be able to configure teams with as well?

User could have a 1 to many relationship with teams. And team mapping is often changed due to moving agents from different supervisors or getting cross-trained, promoted, etc. There is always a lot of movement with agents.

—

agent-team changes happen every day

Join CRM - agent to sales manager mapping

agents - contractors vs employees. contractors may not renew contracts

agents are changing - Life LOB to Medicare LOB managers - leave, fired, changing LOB, org changes

agent-team - 200-300 changes a week

QA Analyst team needs to be assigned to all Agents like Default team; was a struggle; many teams like that that need to be assigned to all Agents

206 teams; 5000 Users

15-20 non agent users per week

would prefer user team sync within user sync rather than UI

wants to give master copy every week

user-team mapping - very frequent change

wants to use user sync beta

Pain point | Insight | Idea | Mild pain

Assurance - 2

https://observe-ai.zoom.us/rec/share/4LEFky1n3ibQaOmiXUrn7O3vR5GCaeSW2H2EaHiA8FZgxH2FTWJ2fSCG65Dklcfu.PPB17xLtEGMF_MbY

Passcode: 2Db$q4iV

—

They have separate teams because of requirements from the carrier.

Calls can be reviewed only by a specific team. They have onshore and offshore. So an onshore agent cannot review an offshore call.

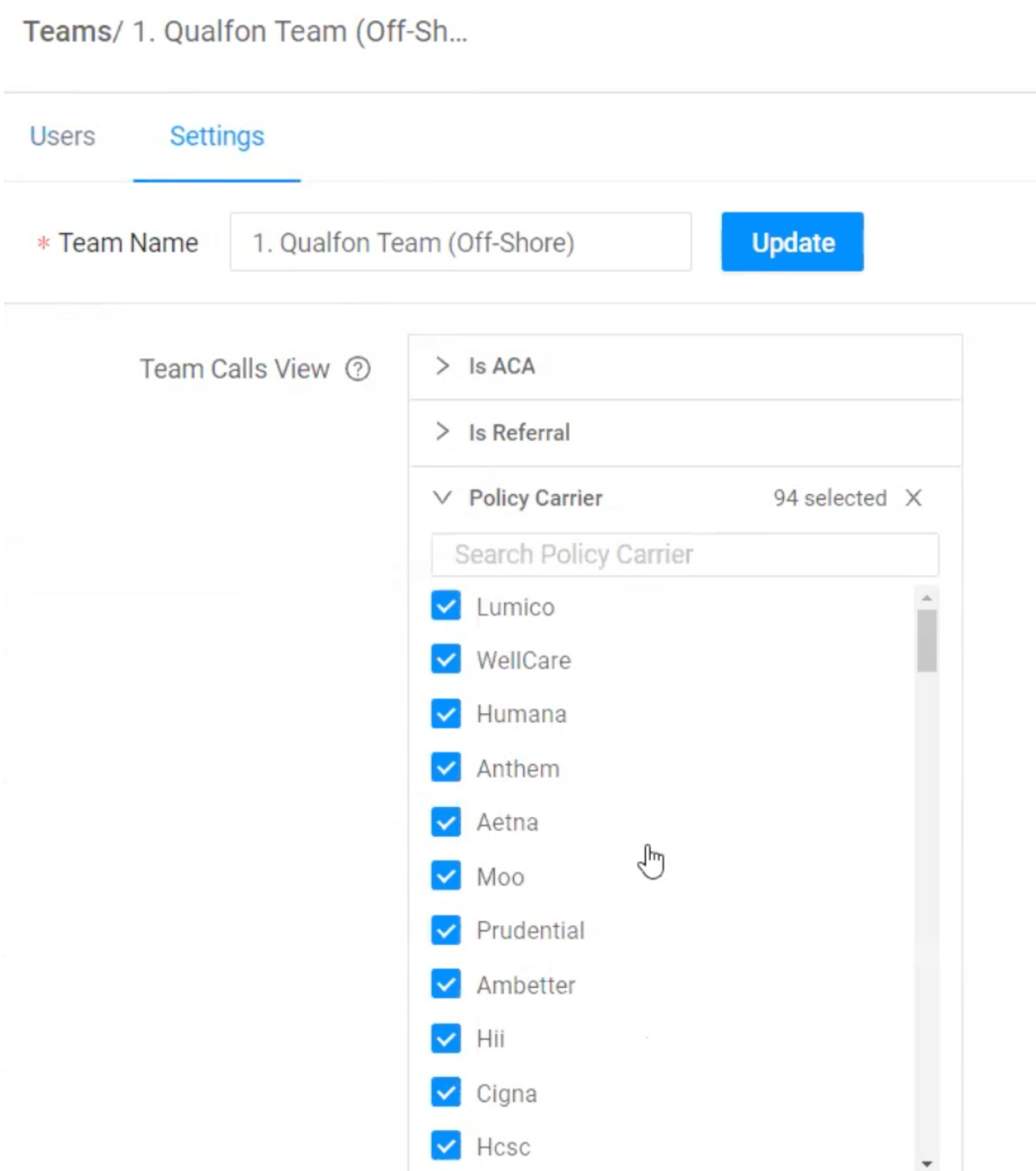
When agents are imported, they are automatically assigned to the default team. They want this to automatically assign to the QA analyst team.

Moving agents from default team to a predefined team is tedious

Agents can be a part of multiple teams. Eg. same agent can be a part of UFC as well as SSG.

QA analyst can only be a part of one team.

They have restrictions on QA mapping but not on agent mapping.

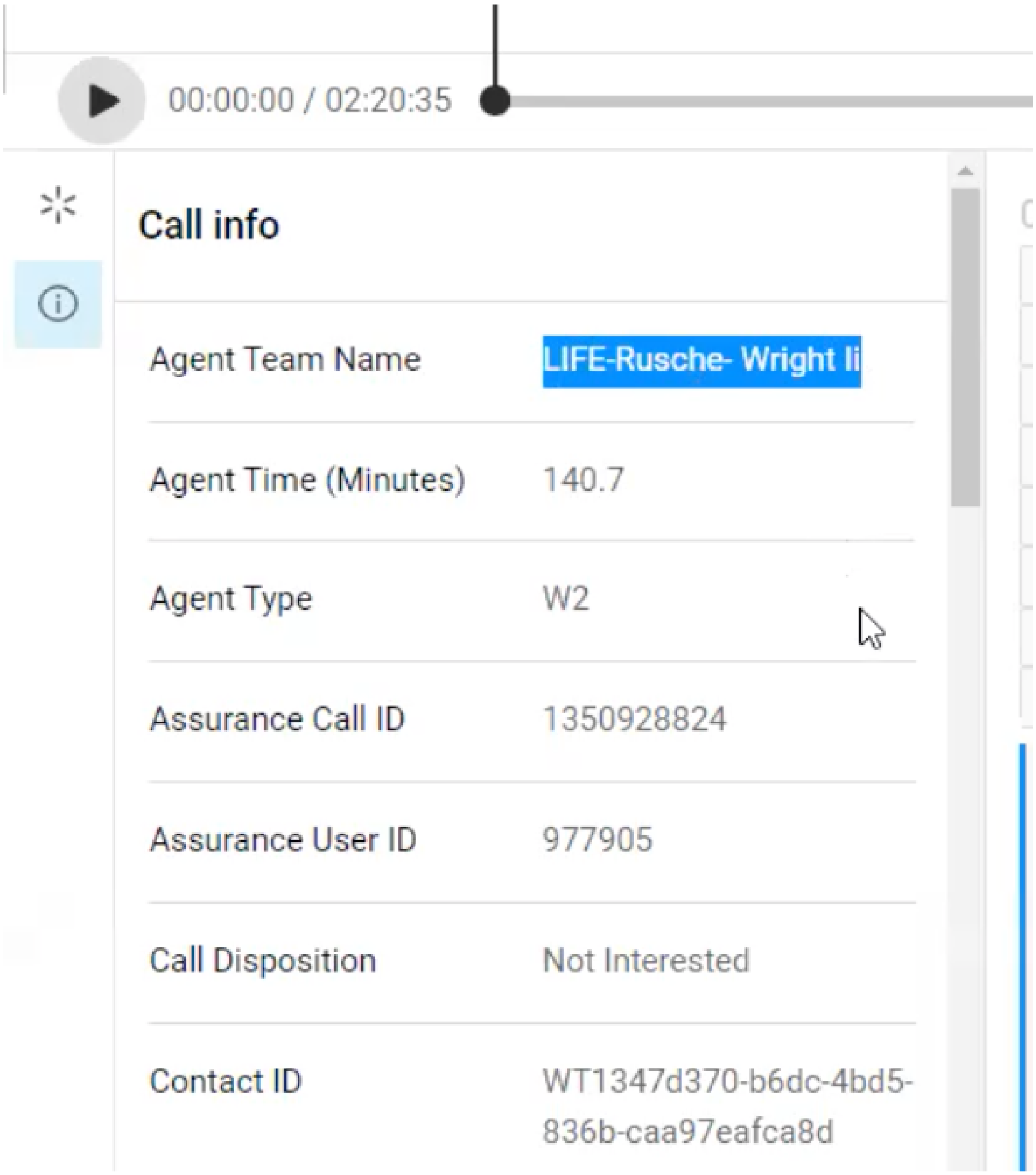


Restrictions based on metadata. In this case the metadata tells them which policy call was it. This is not based on Moments.

Current workflow for moving agents between teams : All users > Filter by agent role > Select all > Actions (Add team) > Enter team names > Save

They use internal nomenclature for teams. ‘HEALTH-Buchanan-Khalil’ where first part is the type of insurance, the second part is name of manager and the third is the name of the QA.

They don’t have a way of viewing agent metadata like ‘internal team name’ from the users section. So they go to calls > agent filter > view call > call info to get this information.



They are mapping from Agent metadata to the teams construct in OAI

They have to redo the agent to team mapping from their metadata on OAI

They don’t even see metadata of agent on users tab. This is expected by the admin and is a major pain point.

Agents can be a part of multiple teams, but usually they have a primary team.

Multiple roles might need view access to a set of agents.
Eg. Sales manager might want a view of agents in the Health team. Currently they give view access by adding the Sales manager to the agents’ team or by creating a separate team.

They have a concept of line of business. Currently they use Teams and metadata filters to create this construct.

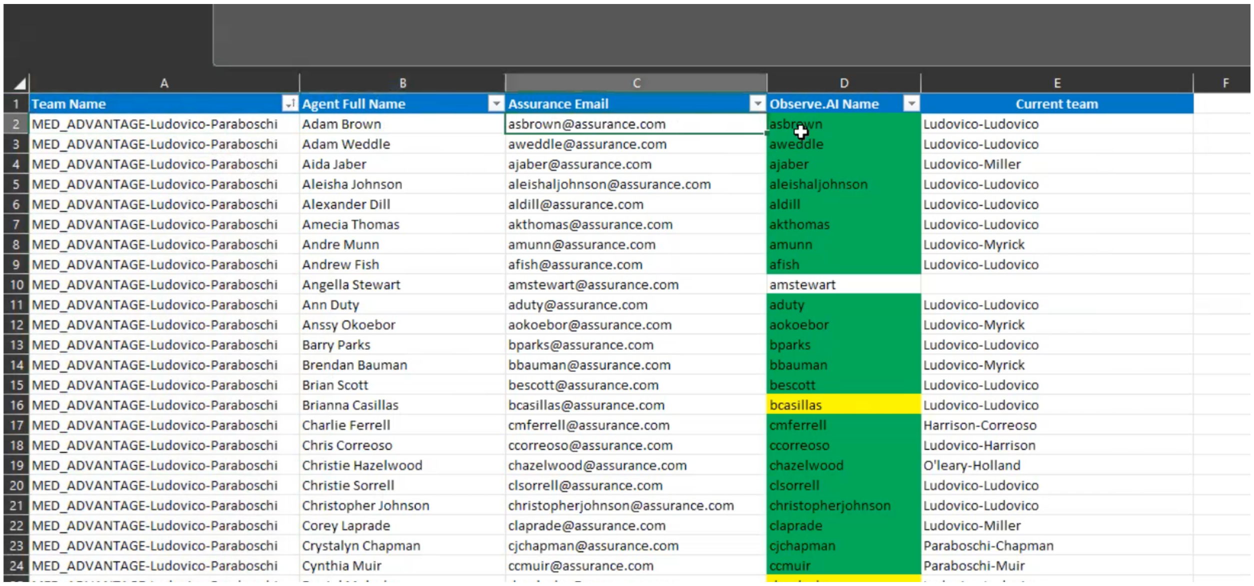
Line of business is not necessarily a team.

Default Team	3982	None
HEALTH	743	Line of Business: health · Agent Team Name: HEALTH-Mor...
HEALTH-Buchanan	51	Agent Team Name: HEALTH-Buc...
HEALTH-Buchanan-Dorvulus	43	Agent Team Name: HEALTH-Buc...
HEALTH-Buchanan-Holewinski	39	Agent Team Name: HEALTH-Buc...
HEALTH-Buchanan-Khalil	46	Agent Team Name: HEALTH-Buc...

Teams metadata is not associated with evaluations or coaching tabs, so there is no way to tie that metadata. Coaching and evaluations are the main tabs that managers are using.

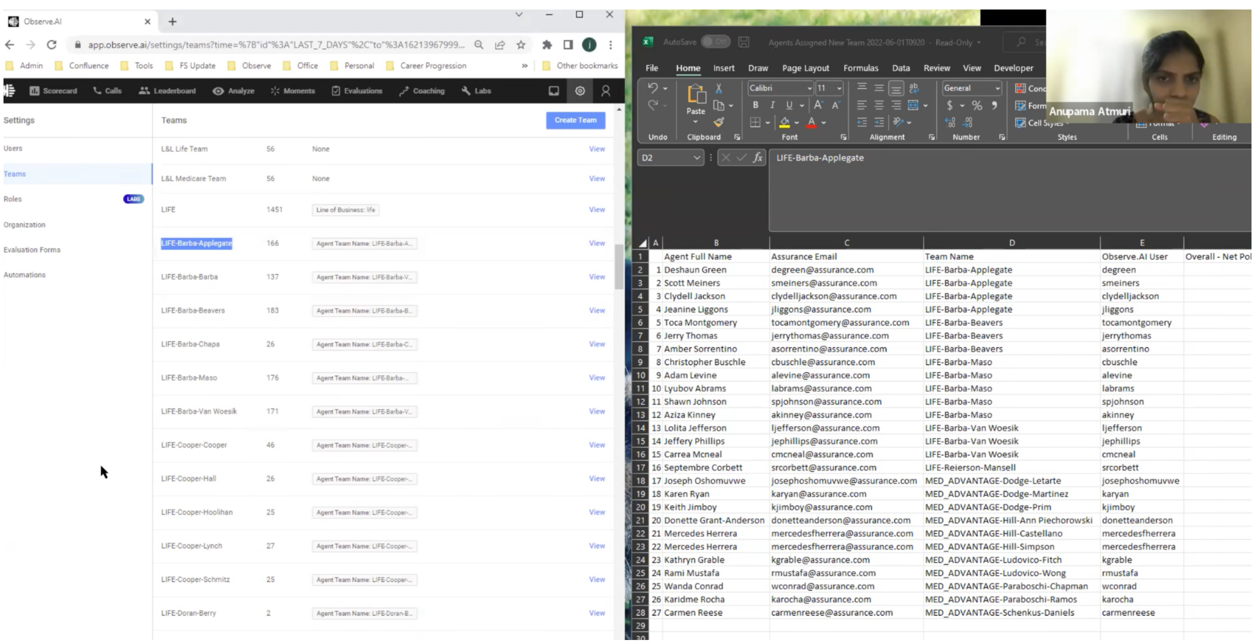
They get team change information from multiple external channels.

A new team could be created in Looker but not in OAI. This is an issue



	Team Name	Agent Full Name	Assurance Email	Observe.AI Name	Current team
2	MED_ADVANTAGE-Ludovico-Paraboschi	Adam Brown	asbrown@assurance.com	asbrown	Ludovico-Ludovico
3	MED_ADVANTAGE-Ludovico-Paraboschi	Adam Weddle	aweddle@assurance.com	aweddle	Ludovico-Ludovico
4	MED_ADVANTAGE-Ludovico-Paraboschi	Aida Jaber	ajaber@assurance.com	ajaber	Ludovico-Miller
5	MED_ADVANTAGE-Ludovico-Paraboschi	Aleisha Johnson	aleishaljohnson@assurance.com	aleishaljohnson	Ludovico-Ludovico
6	MED_ADVANTAGE-Ludovico-Paraboschi	Alexander Dill	aldill@assurance.com	aldill	Ludovico-Ludovico
7	MED_ADVANTAGE-Ludovico-Paraboschi	Amecia Thomas	akthomas@assurance.com	akthomas	Ludovico-Ludovico
8	MED_ADVANTAGE-Ludovico-Paraboschi	Andre Munn	amunn@assurance.com	amunn	Ludovico-Myrick
9	MED_ADVANTAGE-Ludovico-Paraboschi	Andrew Fish	afish@assurance.com	afish	Ludovico-Ludovico
10	MED_ADVANTAGE-Ludovico-Paraboschi	Angella Stewart	amstewart@assurance.com	amstewart	
11	MED_ADVANTAGE-Ludovico-Paraboschi	Ann Duty	aduty@assurance.com	aduty	Ludovico-Ludovico
12	MED_ADVANTAGE-Ludovico-Paraboschi	Anssy Okoebor	aokoebor@assurance.com	aokoebor	Ludovico-Myrick
13	MED_ADVANTAGE-Ludovico-Paraboschi	Barry Parks	bparks@assurance.com	bparks	Ludovico-Ludovico
14	MED_ADVANTAGE-Ludovico-Paraboschi	Brendan Bauman	bbauman@assurance.com	bbauman	Ludovico-Myrick
15	MED_ADVANTAGE-Ludovico-Paraboschi	Brian Scott	bescott@assurance.com	bescott	Ludovico-Ludovico
16	MED_ADVANTAGE-Ludovico-Paraboschi	Brianna Casillas	bcasillas@assurance.com	bcasillas	Ludovico-Ludovico
17	MED_ADVANTAGE-Ludovico-Paraboschi	Charlie Ferrell	cmferrell@assurance.com	cmferrell	Harrison-Correoso
18	MED_ADVANTAGE-Ludovico-Paraboschi	Chris Correoso	ccorreoso@assurance.com	ccorreoso	Ludovico-Harrison
19	MED_ADVANTAGE-Ludovico-Paraboschi	Christie Hazelwood	chazelwood@assurance.com	chazelwood	O'leary-Holland
20	MED_ADVANTAGE-Ludovico-Paraboschi	Christie Sorrell	clsorrell@assurance.com	clsorrell	Ludovico-Ludovico
21	MED_ADVANTAGE-Ludovico-Paraboschi	Christopher Johnson	christopherjohnson@assurance.com	christopherjohnson	Ludovico-Ludovico
22	MED_ADVANTAGE-Ludovico-Paraboschi	Corey Laprade	claprade@assurance.com	claprade	Ludovico-Miller
23	MED_ADVANTAGE-Ludovico-Paraboschi	Crystalyn Chapman	cjchapman@assurance.com	cjchapman	Paraboschi-Chapman
24	MED_ADVANTAGE-Ludovico-Paraboschi	Cynthia Muir	ccmuir@assurance.com	ccmuir	Paraboschi-Muir

Excel sheet of team change. First column is current team, last column is the new team.



		Agent Full Name	Assurance Email	Team Name	Observe.AI User	Overall - Net Pol
2	1	Deshaun Green	degreen@assurance.com	LIFE-Barba-Applegate	degreen	
3	2	Scott Meiners	smeiners@assurance.com	LIFE-Barba-Applegate	smeiners	
4	3	Clydell Jackson	clydelljackson@assurance.com	LIFE-Barba-Applegate	clydelljackson	
5	4	Jeanine Liggons	jliggons@assurance.com	LIFE-Barba-Applegate	jliggons	
6	5	Toca Montgomery	tocamontgomery@assurance.com	LIFE-Barba-Beavers	tocamontgomery	
7	6	Jerry Thomas	jerrythomas@assurance.com	LIFE-Barba-Beavers	jerrythomas	
8	7	Amber Sorrentino	asorrentino@assurance.com	LIFE-Barba-Beavers	asorrentino	
9	8	Christopher Buschle	cbuschle@assurance.com	LIFE-Barba-Maso	cbuschle	
10	9	Adam Levine	alevine@assurance.com	LIFE-Barba-Maso	alevine	
11	10	Lyubov Abrams	labrams@assurance.com	LIFE-Barba-Maso	labrams	
12	11	Shawn Johnson	spjohnson@assurance.com	LIFE-Barba-Maso	spjohnson	
13	12	Aziza Kinney	akinney@assurance.com	LIFE-Barba-Maso	akinney	
14	13	Lolita Jefferson	ljefferson@assurance.com	LIFE-Barba-Van Woesik	ljefferson	
15	14	Jeffery Phillips	jephillips@assurance.com	LIFE-Barba-Van Woesik	jephillips	
16	15	Carrea Mcneal	cmcneal@assurance.com	LIFE-Barba-Van Woesik	cmcneal	
17	16	Septembre Corbett	srcorbett@assurance.com	LIFE-Reierson-Mansell	srcorbett	
18	17	Joseph Oshomuvwe	josephoshomuvwe@assurance.com	MED_ADVANTAGE-Dodge-Letarte	josephoshomuvwe	
19	18	Karen Ryan	karyan@assurance.com	MED_ADVANTAGE-Dodge-Martinez	karyan	
20	19	Keith Jimboy	kjimboy@assurance.com	MED_ADVANTAGE-Dodge-Prim	kjimboy	
21	20	Donette Grant-Anderson	donetteanderson@assurance.com	MED_ADVANTAGE-Hill-Ann Piechorowski	donetteanderson	
22	21	Mercedes Herrera	mercedesfherrera@assurance.com	MED_ADVANTAGE-Hill-Castellano	mercedesfherrera	
23	22	Mercedes Herrera	mercedesfherrera@assurance.com	MED_ADVANTAGE-Hill-Simpson	mercedesfherrera	
24	23	Kathryn Grable	kgrable@assurance.com	MED_ADVANTAGE-Ludovico-Fitch	kgrable	
25	24	Rami Mustafa	rmustafa@assurance.com	MED_ADVANTAGE-Ludovico-Wong	rmustafa	
26	25	Wanda Conrad	wconrad@assurance.com	MED_ADVANTAGE-Paraboschi-Chapman	wconrad	
27	26	Karidme Rocha	karocha@assurance.com	MED_ADVANTAGE-Paraboschi-Ramos	karocha	
28	27	Carmen Reese	carmenreese@assurance.com	MED_ADVANTAGE-Schenkus-Daniels	carmenreese	

There are sometimes empty teams.
Users want to create a team first and then add agents.
OAI expects agents already present for a team.

“this is what takes up the majority of our time is just updating the the agents that are in here”

Updating agents is a tedious activity.

Automation: New agents information can have team names sent with it to automatically add to OAI.

“the way that it assigns them the default teams would be great if they could assign them to all the QA teams at that same time that would save a large amount of time right there.”

Idea: Change in default team

Removing agents has not been their teams priority. They just deactivate agents that leave.

—

All Agents are onshore, but not all of our reviewers are onshore. UHC does not allow offshore of their data/calls.

Agents will also sometimes switch line of insurance, which is why it's easier for us to assign all QA review teams to them.

Team names are same inside and outside

agents can take any calls

metadata has the info on the call that was taken

QAs to see only calls with certain metadata

can metadata from call be consumed? - OAI

can they send agent to team mapping(all teams up to date) in every sync

Pain point | Insight | Idea | Mild pain

ADT Solar

https://observe-ai.zoom.us/rec/share/o9IvidIZ587N-P6SAdNSFus2YesIlRqiLOte7UjPv1F-bv-HzJYM7ImpPxUVs501.i8Vc1dFy2ROyQeoq

Passcode: j?c6^Snv

–

They had to add a bunch of team managers to OAI for which they had to submit a ticket to OAI. That was not ideal and is a frustrating experience.

“the primary kind of thing we're trying to overcome is is so we're relying on people realizing they don't have the access, they need before and then telling us, and then as assigning retroactively and to samantha's point when those people are not on the phones taking calls, you know, having to go through the Multi step process of submitting a ticket that's that's our biggest inefficiency right now sure.”

“the Multi step process of submitting a ticket that's that's our biggest inefficiency right now sure.”

New people join every 2-3 weeks, so agents are added in a similar frequency.

They don’t have a solid process around assigning new agents into teams. It happens in an adhoc fashion depending on the team manager.

“If there was a group or a notification or something when new users were created so that we could just go work, the list of new users, whether that's an email or Whatever the case may be”

The reason they want to be notified about new users added is because out of approx 70 hires, only 63 show up the first day and then only 50 make it on the phone.

They can’t always rely on their rosters or documentation because of the high attrition rate. New user notification can become a point of clarity for actual hires.

When new hires are made, first week they are not assigned to a team. This is because they might lose 20% of the cohort. They are trying to save wasted effort.

New hires who are left take training calls in the middle of their second week. They are not assigned to production teams till about a month into the organization.

It’s a struggle because their training team does not user OAI. So when they get put on the floor, they don’t know who has made through training, who has calls, who’s started taking calls.

Idea: Creation date of new users on the platform

“where we could have a list that we go through you know, once a week of everyone that's been created after X date and we can get them assigned as opposed to depending on the team leader team manager supervisor saying hey they're supposed to be my team and they're not, I think, would would help us solve for that that process.”

Keeping a track of agents moving from one manager to another.

Moving agents between managers is frequent and sometimes happens without the knowledge of the admin. In this case, the admins have to reach out to managers to get this information.

Why agents move managers: “the end user and their manager relaying that message, there are any sometimes it's backfilling different skills, sometimes it's just load balancing the number of people who report to one person.”

“if we were able to feed a custom value into the metadata that's coming across with that user that the calls that they're they're taking I wonder if we could somehow reference that metadata to automatically assign them to a team that we decide is representative of those types of calls.”

Changing roles is a usecase for them.
Does not have to be in bulk necessarily.

They are a rapidly growing company that went through a merger, they have many people coming in, moving out and trying to align business models. New parent will dynamically change what role a group of individuals will have or promotion within groups.

“we moved about three quarters of our call Center from one dialing platform over to the next and that's that includes all of their supervisors admins team leads etc. Being able to just default add and update all of those new users as a part of that merger would save us having to go in and do it all manually”

They moved from Canvas to Five9 dialer. Roles, email and all other details stayed the same. But they weren’t on OAI, so they had to create these roles.

—

600+ Agents; 150+ non-Agents - very high ratio?

want to give Agents access to OAI by default for new Users - Shak following up with integrations team

wants to use User sync Beta -

- to update old users to have OAI access
- to disable access for agents who have left
- to create non-agent Users - once in 2-3 weeks they get added. lose a day of work because of the turn around time on the support ticket

agent to team mapping is cumbersome

Had equal preference for UI based User-Team sync vs User Sync

can share the Users master file at the same sftp location as calls

want to send User metadata on call and expect us to consume it from there

- User-Team mapping
- or some other attribute change

Soaren

they have 4 different brands. each agent can take call for any brand

but the qa auditors should not see data for other brands

they tried to use team construct with filters to restrict seeing of data. that works on calls page but not evaluations page.

evaluations page - the qa audiotr sees agents belonging to the team who may have taken calls for other other brands. so, other brands calls are visible.

LiveOps

1 person - 2roles

display names is the problem

dont use teams much

non-agents - not much attrition. prefer to do it manually.

errors to be sent to a list of emails

want to send limited metadata

use user sync to update user profile - especially display names. see if display name problem is solved with the prems fix.

want to use user sync only for display name updation

Concentrix

didnt want to give direct access

dump user data in a csv format

constant changes in team

user-team mapping is being sent via files to Implementations team

Block

asked if we have an api that they can call when the change happens

Amherst

uJet - CCaaS provider. has details about Agents and Non-agents not QA Analysts

Client prefers to pull from Sailpoint (RBAC provider). Workday has the data. would like OAI to pull directly from sailpoint not uJet as a middle party

Sailpoint is not implemented yet
They prefer to push data rather than us pulling data at this point. they are looking for endpoint from our side to push data.

Since sailpoint is not available. they are thinking if they can share data.

Agents - dynamic user sync already. no problems

Non-agents - they want to sync (70-80 in number). not too much turnover

User to Team mapping changes constantly. on basis of workforce management, agents are moved from one business division to the other. User promotions and such. prefer to have an automated way of changing teams.

They want to maintain roles on OAI. want to sync roles in automated manner

they dont want supervisors of one team to be able to see data of other teams.

qa analysts - internal are universal. can see all data. compliance use-cases.

they qa analysts who should not see data of other departments

their teams are on basis of business units not supervisors

1 supervisor can be mapped to multiple teams

Qualfon

Expected sso to solve for user team sync as well

User to team assignment comes as a roster to them. Agent to supervisor mapping is present.

No construct of team name in the roster

Team setup - no hierarchy; supervisor based teams and other teams as well

Asking of team name was supervisor name - would bulk upload be easier

Why they move teams?

Team to focus this side of business

Agent-supervisor not working

They handling different business divisions

Sap successfactors is where agent and supervisor info is present

Agent can belong to multiple teams

User creation and updation is not a challenge

User to team mapping every week is a challenge

Accolade - 1

dont want to give access to workday apis

asked if we have an api that they can call when the change happens

want to sync once a day

asked if a not-present user will be considered as ‘marked for deletion’

would like hierarchy too but teams created on observe are different from teams that they have on workday - they have agent to steward mapping

asked about how errors

Azure AD sync - Accolade act as a test or early beta user for any Active Directory advancements with SSO.

—

Where does this information reside? Workday

How can we send this data over? We can export this to Observe.AI in any way that is needed. (Observe.AI syncing the information would be using the sample file attached)

This will be once per day.

Would prefer to push the data over to Observe.AI in an S3 bucket. Send the files through S3 on a periodic basis - once per day into a specific folder on the bucket.

Send us all of the users every time

If there is something that goes wrong on a specific record, will there be a notification on which file failed?

Logs will be internal, but aren't exposed to the clients.

If the second row fails, the other users aren't deleted, we will still keep processing on each of the rows.

Soft delete - when a user is marked as disable

How do we handle roles? Just list the role name within the csv file

Team Management - Is there a way to do this within the user sync?

When you create a user, and assign them to team(s). How often is this association changed? Constantly, daily. Right now the Supervisors are updating their teams daily. To have this automated would be a huge benefit.

What are some of the use cases for changing the teams constantly?
The move to another role, growth, promotions, cross training

Upgrading user sync capabilities, we are looking at syncing teams as well. Ideally in a few months, we will be able to add another column with the team(s) that the user needs to be associated with.

Rob - OAI

https://observe-ai.zoom.us/rec/share/bL_36TRBB-NVCNeHfTIyczDkA8spxN6JuzLxmpMvDDog-ZygIVF2nJoSlN20jctc.npXjGcxgNSo3Oojc

Passcode: #M..q0C#

—

Reference

[Enterprise Implementation Guide]()

—

100% of agents should be coming by call ingestion

“automation works from an integration perspective is once that agent takes a call once we ingest one recording for them.”

We can create agent profiles manually from CS dashboard, but they will not merge if the same agent was ingested from calls. Now you will have two agent profiles for the same agent.

Merging agents is a problem. If there are any differences between the agent name or metadata, a new profile gets created.

id	first name	last name	role	email	dashboard access	enable	Team	LOB
1001	Adrian	Valenzuela	agent	adrian@observe.ai	TRUE	TRUE		
			supervisor					
			admin					
			qa analyst					

Template to create user. Team and LOB columns are not ingested, they use it for reference.

“however, their internal business language works on how their internal hierarchy works, we (OAI) try to mirror that as much as possible.”

It gets more complicated to build teams when there are multiple levels of hierarchy

OAI has a playbook for user management that onboarding team uses

Creating agents is a part of ingestion and deosn’t consume too much time. This process is however highly technical.

For non-agents the ETA for adding is 24 hours. But sometimes implementation managers are busy, so the ETA might extend.

Creating teams is time consuming. Currently creating 40 teams might take 3-5 business days.

Creating teams is easy, but mapping is the challenge.

Changing roles of ingested agents is not a frequent usecase

“you also have those clients who might come in and say, well, I don't like the way the agents names are spelled when they appear in the dashboard”

“I would love to see if clients can create agents one day right if that can be self-service.”

“if I need to update a group of users, like their roles, you have to do it, one by one.”

“I would want the ability to pick and choose okay if i'm on page one, I just need these five users from page one, I need these five pages from page to any these five users from page 10 only.”

“it's really the team updates that's really the big pain point”

There’s not much difference between an enterprise and non-enterprise client when it comes to onboarding apart from the headcount.

Call Recording License	User ID	DID	EXT	Description	Location ID	Region Name	Location Name	Parts Dept	Service Dept
»Call Recording Basic	8633013704@mymtm.us	8633013704	3704	Clewiston Parts	3100001873-25	Florida	Clewiston	X	
»Call Recording Basic	8633013702@mymtm.us	8633013702	3702	JR Varela	3100001873-25	Florida	Clewiston	X	
»Call Recording Basic	8633013705@mymtm.us	8633013705	3705	Clewiston Service	3100001873-25	Florida	Clewiston		X
»Call Recording Basic	9547451745@mymtm.us	9547451745	1745	Adrian Scolari	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451748@mymtm.us	9547451748	1748	Maria Rivadeneira	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451751@mymtm.us	9547451751	1751	Ricardo Scolari	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451752@mymtm.us	9547451752	1752	RJ Place	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451754@mymtm.us	9547451754	1754	Dan Kelly	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451755@mymtm.us	9547451755	1755	Mario Gonzalez	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	9547451761@mymtm.us	9547451761	1761	Chelsey Vidot	3100001873-29	Florida	Fort Lauderdale		X
»Call Recording Basic	9547451763@mymtm.us	9547451763	1763	Katie Martin	3100001873-29	Florida	Fort Lauderdale		X
»Call Recording Basic	9547451765@mymtm.us	9547451765	1765	Burt Perez	3100001873-29	Florida	Fort Lauderdale		X
»Call Recording Basic	9547451766@mymtm.us	9547451766	1766	Frank Rodriguez	3100001873-29	Florida	Fort Lauderdale		X
»Call Recording Basic	9547451780@mymtm.us	9547451780	1780	Scott Enslen	3100001873-29	Florida	Fort Lauderdale		X
»Call Recording Basic	9547451762@mymtm.us	9547451762	1762	David Chessler	3100001873-29	Florida	Fort Lauderdale	X	
»Call Recording Basic	2399353007@mymtm.us	2399353007	3007	John Lamp	3100001873-24	Florida	Fort Myers	X	
»Call Recording Basic	2399353009@mymtm.us	2399353009	3009	Jake Nieminen	3100001873-24	Florida	Fort Myers	X	
»Call Recording Basic	2399353008@mymtm.us	2399353008	3008	Guillermo Rodriguez	3100001873-24	Florida	Fort Myers	X	
»Call Recording Basic	2399353010@mymtm.us	2399353010	3010	Steven Carrera	3100001873-24	Florida	Fort Myers	X	
»Call Recording Basic	2399353005@mymtm.us	2399353005	3005	Mike Pelland	3100001873-24	Florida	Fort Myers		X

Team names as location names

Location based hierarchy Agent > Fort lauderdale > Florida

Location Team View and Supervisor Team views

	first name	last name	role	email	Manager Name	Location	Call Type	Team	
2	Adrian	Balom	Agent	Adrian.Balom@peopleconnect.us	Crystal Bates	San Diego		SD-AM	
3	Abigail	Garcia	Agent	Abigail.Garcia@peopleconnect.us	Samantha Smith	San Diego		SD-PM	Location Team View and Supervisor Team views
4	Adrian	Topete	Agent	Adrian.Topete@peopleconnect.us	Jeff Edelen	San Diego		SD-AM	
5	Bernice	Leanio	Agent	Bernice.Leanio@peopleconnect.us	Fernando Juarez	San Diego		SD-PM	
6	Jessica	Custodio	Agent	Jessica.Custodio@peopleconnect.us	Samantha Smith	San Diego		SD-PM	
7	Shalease	Jarman	Agent	Shalease.Jarman@peopleconnect.us	Samantha Smith	San Diego		SD-PM	
8	Ulises	Perez-Brito	Agent	Ulises.Brito@peopleconnect.us	Jeff Edelen	San Diego		SD-AM	
9	Irenia	Pina	Agent	Irenia.Pina@peopleconnect.us	Yvonne Moss	San Diego		SD-AM	
10	Keion	Patton	Agent	Keion.Patton@peopleconnect.us	Crystal Bates	San Diego		SD-AM	
11	Rachel	Carter	Agent	Rachel.Carter@peopleconnect.us	Fernando Juarez	San Diego		SD-PM	
12	Jose	De Jesus	Agent	Jose.DeJesus@peopleconnect.us	Crystal Bates	San Diego		SD-AM	
13	Khristapher	Graham	Agent	Khristapher.Graham@peopleconnect.us	Crystal Bates	San Diego		SD-AM	
14	Oshanti	Hall	Agent	Oshanti.Hall@peopleconnect.us	Jeff Edelen	San Diego		SD-AM	
15	Kyle	May	Agent	Kyle.May@peopleconnect.us	Fernando Juarez	San Diego		SD-PM	

Teams created with manager names and teams created with location names

Copy GREEN cell and Paste Values to Column J in the Modification tab

Generated Value **Sup1,Mgr1,SrMgr1**

Supervisor	Manager	Manager (Sr)
Sup1	Mgr1	SrMgr1

“it's all hierarchy, at the end of day it's just depending on how deep enough they want the hierarchy to develop.”

“Adrian reports to Crystal who is part of the San Diego location.
Adrian will be assigned to Crystal team view but also San Diego.”

Number of teams depends on the depth of their hierarchy right now.

Accolade - 2

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Passcode: BH4!X+6R

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User sync process is highly technical for Accolade

Teams move around all the time between stewards (supervisor). This is high frequency

Agents get promoted.

It will be useful to pass information from Workday to OAI so that it gets reflected fast and is not outdated. They feel this is better than any manual process they currently use.

Multiple people create teams. That leads to problems with managing users effectively.

“having the teams that are aligned to their supervisors is something that we can automate through workday”

“unless we can build some type of hierarchical system that takes you know the stewards and then the senior stewards that they report to and align things that way well we're not going to be able to to manage any anything else.”

Currently they rely on Supervisor to manage their teams.

“we don't have a mechanism to do that (create hierarchy), like we'd have to create as a senior steward team and put all the people who report to their stewards into that team and and we haven't gone that route.”

“If I’m a service lead that has a portfolio of 50 customers, I want to only be able to see performance of my team.”

They want to figure out turnover of agents.

Accolade wants to analyse strategic customers separately from mid-market customers. Hierchy and grouping can help with this usecase.

Inbound and outbound are types of calls. They created separate teams to view data for these types of calls using filters on OAI. Filter happens within the teams metadata.

Metadata teams are teams based on metadata filters instead of a specific hierarchy. This is created since metadata filters are not present on some tabs on OAI (evaluation, coaching, etc.)

Can we identify if this is a management (exec) level team or an agent team.

They have a high turnover of agents. They don't want to change teams of managers who don't have such a high turnover when agents move. Currently they need to refresh everything.

Agent turnover is very high which is why they don't want a manual workaround.

Agents move in and out, sometimes they get promoted and don't have to do the job of an agent anymore.

Whenever new customers are added, experienced agents are moved to handle their account.

Stewards have access to move people within their team manually.

Currently they don't have a process for user management on OAI. Every steward does it differently. This does not happen consistently.

Movement of agents happens all the time.

There is always a lag between user data on OAI vs Workday.

They have internal communication outside OAI about agents moving teams.

"If I'm a steward and someone's moving to my team, someone is going to tell me that"

Senior steward (supervisor's manager) informs supervisor of personnel change.

Senior steward (supervisor's manager) make the update on Workday. This also need to be communicated to workforce management who updates the scheduling.

They use Workday as a source of truth for UM over Verint.

Verint has an API which they have tried to use. But seems like it was not successful.

There is internal communication about movement of agents.

Because OAI is a new introduction, user management is not done consistently on OAI.

"we haven't held supervisors accountable for updating teams just because we also have been going through some recent changes on ours, we just are trying to be a little bit more patient"

Supervisors need to see the evaluations for their teams, so they feel updating teams is an important job to do.

Workday is the source of truth for user roster.

They have multiple levels of hierarchy. Agents > Stewards > Senior Stewards > VP

“we want the ability to say like if Geeta moved out of Todd’s team that would reflect on work day and that should be reflected in OAI and Geeta’s people moved with her so that would also reflect in work day and that should reflect on OAI”

OAI is an operational tool. So all levels (execs) should ideally use OAI.

Right now a VP sees everything. That is too much information. They need to be able to see an overview.

“we do add one user at a time, or we also add, like a bunch of users, depending is like a new team like now onboards”

Adding users is not a scalable process on their end because of a user (accolade user) they’ll just need to login to their Okta dashboard to get access to OAI, but Admins have ot reach out to OAI to get these users added to their teams.

“fill out a spreadsheet that Russell (OAI CSM) owns that I don't have access to.”

“it would be nice if there was some sort of integration that does that without us having to like you know manually reach out to Russell (OAI CSM)“

If an agent gets promoted to steward, they’ll get their own team. In that case a bulk update would be useful where you might add new people or transfer them from a different team.

One person has handled 5-6 promotions from agent to steward i one month.

They ask stewards to make team mapping changes. They have about a 100 stewards in their team.

“we're not sure that they're (stewards) even doing their own levels consistently, but like I said, I have no idea of who created some of these teams and or how they intend to maintain them.”

It is difficult for them to expose APIs from Workday because of security reasons. Even their internal developers don’t get access. Someone manually exports an XML with specific information for internal devs.

User ‘Travis’ belongs to 9 different teams because OAI doesn’t have hierarchy.

Russell

https://drive.google.com/file/d/15aFMwSbemb72S_zWaXW0acrD73_Xaqjd/view?usp=sharing

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We want to know good types of calls where you're getting good CSAT or NPS scores. They build teams to see that easily.

They are trying to save 'views' by building teams.

There are cases where a supervisor is only looking for a specific type of call, but the agents that report to the supervisor can handle different types of calls as well. They create multiple teams to solve for this usecase.

They create a separate team for leadership to view business data.

If someone had to do user management properly right now, it would be a fulltime job. Customers don't have that kind of resources.

They sometimes create a team with all agents and use filters within tabs (evaluation, coaching, etc.) to simplify the view. This doesn't always work since some metadata filters might not be available on other tabs. This approach also leads to data errors on team views i.e. some users who are not part of a particular team get included in the team's view. (17:15-17:35)

Meghan - Block

She spends atleast 1 hr a day on CS Dashboard.

Block has 5000 users.

Teams are based on

- supervisors' names
- some teams on channel level (All Agents, Partner BPO Agents) - used for team dashboard or reporting

There is 24 hrs turnaround time at OAI end for any request made by Block

She prefers automated user update process over the manual csv upload in the Setting UI.

A manager wants to see aggregated data in Team Dashboard, but currently instead of selecting his team, he has to select his Supervisors' team one by one and aggregate the data manually to make sense of agent performance at the desired level

User-team mapping changes every week due to new agents & attrition mainly

Their HRMS tool is Workday; but roles in WD are different from OAI

Teams in their CCaaS are different from OAI teams

Adrian - OAI (TBD)

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Qualfon

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Notes tbd