NICE Perform™

Solution Overview
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Abstract

In an era where the boundaries between product, promotion, price and placement are blurred, and customer loyalty remains the only true differentiator, the challenges of service-providing organizations are further compounded. Companies dedicate valuable effort to searching for a convenient, reliable and timely method of obtaining insights about internal processes, customers and the competitive environment. Despite the investment in time and money, these efforts often lack focus and coordination. Worse still, they are often not very successful.

Paradoxically, the information is there—but the wealth of data available in customer interactions remains almost entirely untapped.

More and more of today’s business is characterized by increasing reliance upon interactions conducted via telephony and web-based communications. These means of communication are becoming an important and strategic dimension of business across a broad spectrum of vertical markets. In these business environments, a great deal of information lies hidden within the ever-growing quantities of unstructured multimedia interactions. This information can provide decision makers in a variety of areas throughout the enterprise with powerful insights into their marketplace and customer base, and direct access to key business scenarios. Many of these capabilities are not available with traditional transactional-based analytics tools. They are of great value to organizations constantly searching for better ways to understand their market dynamics and customer intent, while operating within the limitations of traditional surveying and data analysis techniques and growing regulatory requirements.

NICE Perform provides the breakthrough. By analyzing interactions across an unprecedented range of parameters, NICE Perform extracts the insights that answer those questions previously considered unanswerable – across a range of vertical markets. While providing critical statistical data, NICE Perform offers a solution that goes beyond the scope of transactional analytics to help decision makers understand customer intent and market dynamics, identify current and future trends early enough for proactive management of challenges, opportunities and changes, and enhance corporate governance throughout the enterprise.

NICE Perform offers organizations a powerful tool for improving customer retention and solving many other business issues. The system’s ability to analyze all aspects of interactions means that it can effectively flag calls from customers “at risk”, help in analyzing campaigns effectiveness, identify inefficiencies in the Contact Center operation and much more. NICE Perform lets the organization take proactive measures to improve the overall performance.

NICE believes that organizations should dedicate their efforts to their core activities. That’s why NICE Perform is designed to simplify and enhance operations. With a sophisticated, yet, easy to use solution, NICE Perform gets the right information to the right people in the organization at the right time, to be used for overall business management improvement.

That's insight from interactions.
Overview: The Service-Provision Challenge

In today’s world, every organization is a service-providing organization. True, specific groups in the organization, such as sales, customer support and the contact center, are dedicated to serving customers, but the problems and achievements of its service-oriented units significantly impact the general outcome of each and every company process, from production to revenue collection, and from product design to marketing strategy.

The service-providing organization is dynamic and must be able to respond quickly to changes in its environment. In an era where the boundaries between product, promotion, price and placement are blurred, and customer loyalty remains the only true differentiator, the challenges of service-providing organizations are further compounded.

Some of the most recognizable challenges include:

- **Improving customer retention** – The cost of acquiring a new customer is several times higher than the cost of keeping an existing one. Therefore, low customer retention rates inevitably translate into low growth and high costs, not just for the contact center, which must process orders, but also for every single item on the balance sheet.

- **Ensuring high quality at lower cost** - This is common to all organizations, and the quest to lower costs while maintaining high levels of service is more crucial than ever. Companies must find ways to effectively implement quality assurance across the enterprise, especially in customer-facing operations.

- **Finding a differentiator** – What gives you competitive advantage? Certainly not traditional differentiators such as unprecedented speed, campaigns that can be copied, price wars, a product that can be imitated and slogans changed. Service, which is directly linked to customer loyalty, is the only remaining differentiator.

- **Eliminating data overload and poor business intelligence** – Resources spent on data collection are not always invested in the areas where they’re needed the most. To obtain true business intelligence, companies need not only to gain access to the wealth of data potentially available, but also to be able to distinguish relevant data from unimportant material. Companies further need the ability to analyze it so that it facilitates the decision-making process.

- **Neutralizing competitive threats** – Dynamic organizations must keep on top of their changing competitive environment. One of the biggest challenges is trying to anticipate the tactics competitors may use to lure away their customers.

- **Working as a global company** – Today’s business world knows no geographic boundaries, and different branches of the same organization, regardless of the physical location and possible time differences, must be able to work as one. It is imperative, therefore, to implement solutions that are fully capable of supporting multi-site systems and provide all users with real-time access to company systems, no matter where they are located.

- **Providing employee training and recognition** – This is particularly true for contact center agents, who, despite their low rank in the company hierarchy, deal with the most valuable of its assets: customers. Agents need to be kept up-to-date about the company’s campaigns and policies, receive constant feedback on their performance, and ensure they are empowered to complete their job in the best possible way.

- **Measuring campaign effectiveness** – Companies spend substantial resources on collecting data from customers to evaluate the effect of a new product offering, price reduction or advertisement. However, most of the time, these evaluations are costly and do not provide immediate feedback.
Insight from Interactions

Companies dedicate valuable effort to searching for a convenient, reliable and timely method of obtaining information about internal processes, customers and the competitive environment. Despite the investment in time and money, these efforts often lack focus and coordination. Worse still, they are often not very successful.

Paradoxically, the information is there—but like a hidden goldmine, the wealth of data available in customer interactions remains almost entirely untapped.

Recorded customer interactions are far more than a way to comply with regulatory or liability guidelines or provide feedback to customer service representatives. With the right tools, companies can locate, extract, refine and distribute a wealth of information from their existing resources.

NICE Perform gives companies the tools to do what was previously impossible – to create insight from interactions. NICE Perform technology means lower storage costs, a much more cost effective interaction-capturing platform and retention rules ensuring that all organizations, even those that do not have to record for liability or regulation, can benefit from recording all of the interactions without requiring major investment.

NCE Perform provides efficient ways to extract the information, analyze it and visualize it in a graphically effective manner, so that all units in the organization can use it to create insights and improve overall business performance.

Who Benefits?
The wealth of insights obtainable from customer interactions serves far more than the contact center supervisor – it is a timely, reliable, invaluable and inexpensive source of business intelligence for the entire organization. Among other possibilities:

- Executives can now effectively measure customer retention rates and understand the true reasons behind them.
- Legal departments can receive rapid warnings of possible legal problems from analysis of customer interactions.
- Marketing directors can receive timely and reliable information on, for example, the effectiveness of a TV campaign launched only a few hours earlier.
- Contact center managers can analyze feedback to gauge and improve first-call resolution.
- Account managers can locate all the interactions belonging to a specific account, analyze problematic areas and identify major issues.
- Quality supervisors can analyze customer responses to verify that supervisors’ agent evaluations reflect customer perceptions.
- Supervisors can evaluate agent interactions, from anywhere, to ensure that the required level of quality is maintained and that organization policies are followed.
- Agents can access their own evaluations, quality reports, coaching packages and any other important information about their performance from a single point, based on the privileges they have been granted. This ensures that they receive and provide ongoing feedback, and empowers them to perform better.
- Coaching specialists can quickly create and send a focused coaching package to an agent, a group of agents or the entire contact center.
- Contact center analysts can define autoscoring formula to assist users in evaluating calls or identifying those that show a specific trend.
In short, all units in the enterprise can benefit from the insights NICE Perform generates from interactions.
NICE Perform Tools

NICE Perform includes a complete set of Web-based tools to extract, process, analyze and effectively visualize information from customer interactions on a large scale. The information gathered through:

- Sophisticated mining rules
- Analysis engines
- Call flow events,
- Agent screen-activity
- Customer surveys

Together, these resources provide the insights which until now have been unavailable from recorded interactions.

![Figure 1: NICE Business Analyzer](image)

When combined, these five major tools deliver unmatched ability to extract insights from customer interactions and to use these insights to promote business success.

**Capturing Audio and Screens**

With up to 500 channels per recorder, high compression rates and the ability to integrate with any storage system, the NiceLog® Logger in NICE Perform provides a robust method of capturing the complete breadth of customer interactions in the contact center through fixed or random-based scheduling, event-based recording or recording of all calls. Furthermore, sophisticated rules allow the system to “listen” to calls – and keep only those the organization finds valuable.

With this advanced capturing solution from NICE, there is no longer any need to compromise by recording only a sample of the interactions with customers. For the same cost, the company can now capture all interactions (including voice and screen), have the system analyze them and, based on predefined rules, store only what is necessary. This sophisticated analysis of all calls and accessibility to any of them dramatically improves the
quality management process in the call center, and the response to intelligence gathering needs.

**The Audio Analysis Engine**

NICE Perform utilizes technologies such as automatic speech recognition, word spotting, and stress/emotion analysis to enable users to extract strategic business intelligence from customer interactions.

- **Word spotting** – Automatically searches for predefined words and phrases, and enables a manual search for additional words and phrases if required. Word spotting lets users locate critical words, identify competition, detect customer intentions, monitor agent compliance with policies, and evaluate effectiveness of campaigns and sales programs.
- **Emotion detection** – Understand the context of the conversation; spot stress-related calls from either the customer or agent, and identify what is behind the emotions.
- **Talk analysis** – Pinpoints periods of silence and overlaps between the agent’s voice and the customer’s voice, as well as the percentage of the call dominated by either party in the interaction.

**Call Flow Events**

With NICE Perform, organizations can receive and analyze a large number of parameters from the traditional or IP telephony infrastructure, including hold time, talk time, queue time, wrap-up time, abandon from hold and more, and then link all of them to the actual call and context of the call.

**Agent Screen Activity**

ScreenSense™ is an innovative, no-integration application that allows NICE Perform users to capture or tag any type of interaction (voice, VoIP, chat, email, co-browsing) based on agent screen activity or any type of information that appears on the screen (such as customer name, segmentation, monthly bill). It is fully interoperable with virtually any homegrown or third-party application (CRM, ERP, e-Learning, e-mail/Chat, Help-Desk...
applications and more). In addition, ScreenSense is platform independent and supports both Web-based applications and traditional client-server applications.

ScreenSense also has the power to extract any item of information from the agent’s screen and store it as part of the interaction metadata field. Without integration with the application itself, organizations will be able to attach, for example, the customer name, monthly bill amount, customer classification or any other item of information from the agent’s screen to the interaction data for future query or reporting needs.

The identified screen event is displayed as a tag during the playback of the call, allowing reviewers to jump to the precise moment in the interaction that the event took place.

**Customer Surveys**

NICE Feedback™ is a fully integrated, IVR-based survey solution which makes gathering of customer feedback easy and cost-effective. This post-call IVR survey is designed to obtain reliable information on the interaction from the first-hand source: the customer.

NICE Feedback helps companies to obtain timely responses from customers and compare these responses to quality monitoring scores or any other detail from the system, giving them a full picture of the customer interaction. These same surveys can also be used to collect customer feedback on products or marketing campaigns.

It also allows companies to take the advantage of the enormous number of customers that call their contact center every day (at a time that is most convenient for the caller), and asks them to stay on the line for a few more seconds to provide their feedback.

The dedicated reports in the NICE Reporter application enable automatic generation and distribution of results to anyone who needs this information. NICE effectively integrates all of these capturing, analysis and visualization tools inside NICE Perform. As a result, companies maximize the output of intelligence derived from different sources of data, saving valuable time and money, and reaching levels of insight that were not previously possible.
NICE Perform Modules

Contact center and enterprise applications continue to grow in number, scope and complexity. One of the most successful ways to simplify distribution and maintenance of desktop applications is the use of Web-based applications throughout the contact center.

The advantages of Web-based applications are clear, and include:

- **Instant access** – Supervisors and reviewers can log in through an authorized intranet connection, anytime, anywhere, without any client installation
- **Simplified deployment** – Adding users to the system is as simple as defining the user in the administration module
- **Easier maintenance** – Any updates or upgrades are done on the server and do not require access to the desktops of each user.

How the NICE Perform Web Applications Work

The NICE Perform solution applications were planned and designed after extensive market research. NICE organized focus groups with our existing customers to ensure the most user-friendly, easy-to-use and efficient suite of applications. All applications were optimized to meet the unique needs of different users – agents, supervisors, quality analysts and contact center managers, as well as those employed in other units in the organization, including executives, marketing analysts and client service specialists.

Those goals were achieved in part by using state-of-the-art graphical design and advanced Microsoft®.NET technology

The different modules of NICE Perform complement each other to provide insights based on customer interactions, and comprise a powerful tool to monitor the quality and productivity of the contact center. The sections that follow examine the components of NICE Perform in more detail.

The Business Performance Portal

The NICE Perform business performance portal provides each user with a summarized, fully personalized view of the main activities of the contact center. Based on predefined privileges and personal needs, users can decide what information will be accessed using the portal and where it will be located on the screen.

The business performance portal serves as a link to other applications, enabling more personal communication between agent and supervisor, even during times of high pressure. Agents are empowered by accessing the latest available information about their performance, including evaluated calls, customer feedback and relevant reports. Through the portal, they can also access their personalized coaching packages, which can include tips from their supervisor, evaluations of their interactions, information on new campaigns and procedures, or any other information they need to stay up-to-date. In addition, users outside the contact center can readily access the information about customer interactions that interests them from a single, Web-based window.
Business Analyzer

This NICE Perform investigative tool is the main work tool for system users; it includes advanced query capabilities, quality assurance evaluations, creation of focused coaching packages and new advanced visualization features for presentation of query results.

The Business Analyzer enables users to search for all existing system elements and perform any relevant activity on the search results. With this wide range of query criteria and visualization capabilities, users can reach the root of the business issues quickly and efficiently.

The following are some of the fields that can be used for call searching:

- **Audio analysis** – Mentioned words and phrases, their location and certainty for each part of the call, as well as emotion level of each party on the call. Talk over analysis analyzes customer/agent bursts, number of agent bursts, number of customer bursts, talk over percentage, silence percentage, agent talk percentage and customer talk percentage.

- **ScreenSense** – Events, group of events, event value, event object value, position at call.

- **Advanced call flow events** - Queue time, hung-up side, ring time, number of holds, number of transfers, actual wrap-up period and abandon from hold.

- **Customer feedback** - Survey score, question score, question result and voice comment indication.

- **Business data and calculations** - User comments, business data inserted by user or by CTI driver, scoring calculations.

The NICE Perform business analyzer provides graphic information to help, for example, a VP Marketing who wants to improve customer retention. The following figure depicts the results of the first stage of the search performed in the system.
A simple search brings together formerly disparate or unknown information and effectively pinpoints calls that indicate a high risk of customer abandonment.

The query results, as shown in Figure 5, provide a list of customers at risk of leaving. It also provides the score that the system, based on predefined rules (in this case, to assess the risk of customer abandonment) assigns to each result.
These same results can be displayed in various graphical representations, including a color-coded bar scheme per agent, where the length of each bar represents the length of each interaction and (in this example), the color represents the risk to customer retention.

The Business Analyzer also offers sophisticated playback of voice calls and screen activity, allowing users to examine each interaction in depth and in full. The graphic presentation of the interaction in the playback window lets users see clearly where key words appear in the conversation. By simply positioning the mouse cursor over a specific segment of the conversation, a screen tip appears with the actual word used. In addition, the emotion level of the various segments is clearly displayed. These advanced playback capabilities allow users to save time by jumping to the exact segment that is of interest to them. Yet another...
A powerful feature of the Playback Application is the ability to view the full path taken by each call and the interactions between customer and agent at each step along the way.

Furthermore, users can drill down to each interaction and evaluate it for quality management purposes. This enables users, for example, to focus exclusively on the evaluation of calls that have a longer hold time than average, those with a large number of transfers, or even those where the system detected a low probability of customer retention. Of course the advanced randomized call-picking mechanism, for a fair evaluation process, remains an integral part of the system and has even been improved in NICE Perform.
Moreover, fully customizable reports, in addition to a large set of predefined reports, enable this information to be sent to whoever needs it, whenever it is requested.

**Coaching**

NICE Perform’s analytical tools provide decision makers in the enterprise with the insights they need to begin taking action immediately – from using customer feedback and
redesigning a recently launched campaign, to improving product development processes and making their contact center more efficient.

One of the most important uses of agent coaching is providing supervisors with insights they can use: how to coach agents on dealing with newly discovered problems, how to show agents their performance has helped increase customer satisfaction, and what to anticipate in the upcoming campaign.

NICE Perform’s new coaching capabilities enable supervisors, coaching specialists, marketing directors and other authorized experts throughout the enterprise to share knowledge by creating coaching packages that truly empower agents.

- Supervisors can use the Clip Creator to easily build and send agents coaching tips, annotated calls, evaluations and feedback on a recently evaluated interaction – while the issue is still hot.
- Coaching specialists can, in a matter of minutes, send coaching packages to demonstrate the correct use of applications or edit real calls to use them as examples of how to deal with current issues.
- The marketing team can communicate directly with agents by updating them on the newest campaign, and create and maintain strong ties between departments in the enterprise.
- Trainers can cut non-relevant segments of the call and store the remaining part for training purposes to provide insight into real “field experience”.

Agents can review their coaching packages in their own time, let their supervisors know that they have reviewed them and send back comments. Furthermore they can replay the coaching packages whenever they like.

Figure 10: Clip Recording Tool

**Reporter**

While many vendors offer “Web reporting”, NICE Perform offers an extremely comprehensive Web reporting application based in part on Crystal Decisions. NICE Perform Reporter is designed with enterprise reporting in mind, allowing users to incorporate multiple data sources to produce reports and visualize trending specific to their organization.

Enterprise reporting is one of the most critical components of performance management. The NICE approach to reporting is to offer a flexible, open and robust engine that accommodates multiple data sources to achieve client-specific needs. NICE Reporter also offers unmatched ease of use to allow for quick report creation and administration. The application is designed for multi-site administration and information sharing.
Figure 11: Sample Call Type Report

NICE Perform Reporter offers users a range of business benefits:

- Implement an enterprise focus to reporting, allowing the roll-up of data across multiple sites, as well as implement and monitor best practices across the entire organization.
- Automate report scheduling and distribution, and send reports in multiple formats, saving supervisors time and providing reports to executives in the manner that they prefer, including directly to their email inbox.
- Drill down from high-level reports to a listing of the interaction itself.
- Begin creating reports and graphs from day one, and quickly customize and modify the standard reports using the Crystal Decisions engine.
- Create visually dynamic reports that match the look and feel of the organization.
- With over 60 built-in reports, integrate multiple quality scores and metrics into a single report including:
  - Productivity vs. quality (PQ).
  - Quality and customer satisfaction.
  - Breakdown of interaction topics based on word spotting and emotion detection.
  - Quality and training scores.
  - Data imported from other sources to customize reports to needs using Crystal Reports.
• Drill down to investigate root causes of trends.
• Drill down and play back specific recordings or evaluation forms directly from the report to understand the interactions behind the trends.
• Track overall quality performance based on a scorecard approach that integrates multiple quality components including:
  • Training
  • QM results
  • CTI parameters
  • Customer satisfaction
  • Schedule adherence
  • Compensation and benefits

**Advanced Analysis Tools**

While NICE Perform Reporter provides efficient and effective tools for quality management in many surroundings (such as contact centers), many organizations could benefit from more sophisticated reports utilizing a wider range of parameters.

NICE Perform Reporter offers users advanced OLAP-based tools that provide a rapid analysis of shared, multidimensional information. This means that different parameters (for example, customer satisfaction, waiting time and agent excitement) can be charted against each other to provide new and insights into customer relationships.

**OLAP-based Reports**

NICE has developed a range of data cubes that can be used by the NICE Perform OLAP reporter to create advanced, multidimensional reports covering the common business needs of the modern enterprise. These reports provide an efficient analysis of insights generated by NICE Perform. NICE’s OLAP technology and advanced viewing tools generate these reports very quickly, and provide a flexible means of creating different views and adding ad-hoc changes.

![Figure 12: Adherence to Script – Sample Report](image)
NICE Consulting Services can analyze the customer’s specific needs and requirements in order to design and implement, together with the customer, a range of additional data cubes for customized business views.

**Data Mining**

NICE also offers more advanced statistical models and tools that customers can use to create insights (rather than just view statistical relationships) from data available in their system. Using the tools and assistance available from NICE, customers can undertake sophisticated data mining of the information available in their system. Data mining, using tools such as dependencies decision trees and what-if analysis, helps customers discover more sophisticated relationships embedded in the mass of information available in the interactions data base.

For example, users can examine the three main parameters that affect customer satisfaction during a call. The data mining tool returns a list of parameters graded according to their level of influence, and then uses “what-if” analysis to understand the impact of changing one or more parameters on the level of customer satisfaction.

**Rules Manager**

NICE Perform Rules Manager is a single, centralized application that allows users to define recording and call tagging rules. It further allows them to schedule recording, define audio analysis rules, build scoring formulas, define classification and define storage rules. Users can focus on different parts of the organization and define the appropriate rules for each group.

**Recording and Tagging of Calls**

All rules related to the scheduling of recording (including “negative recording”) as well as the tagging of calls are defined in the Rules Manager application.
Audio Analysis Rules

The Audio Analysis rules determine the different types of analysis performed on each call, that is, which of the recorded calls will be analyzed for word spotting, emotion analysis, talk analysis or all of these. Advanced algorithms in the rules engine also help prioritize analysis demands, so that the system continues to function smoothly.
**NICE Storage Center™ Rules**

The NICE Storage Center in NICE Perform defines the retention and archiving rules for storage of voice and screen interactions.

*Figure 14: Audio Analysis Rules*
Scoring and Classification Rules

These rules define the auto-scoring formulas for each interaction. Users can define an unlimited number of rules, according to their requirements. The results are stored in the database and are available for search and reports.

For example, a customer satisfaction score could be calculated by defining a rule to take call flow and audio analysis data and combine them in a formula where the number of CTI “hold” events and audio analysis emotional expressions are evaluated to create a customer satisfaction score per interaction.

It is also possible to classify calls that contain improper customer greetings. A further example would be a rule created using audio analysis word-spotting data to mark interactions that do not contain proper greeting words or phrases. Interactions not found to contain any of the words or phrases that relate to proper greeting such as “How are you?”, or “How may I help you?”, can be classified automatically as belonging to a “Poor Service” group. They can then be queried at a later date and retrieved by this classification.

NICE Monitor

This award-winning application enables agents, supervisors and other authorized users to perform live monitoring of agents. It also enables users to stop and start recording-on-demand, block recording, set business data fields and more.
Administrative Tools

NICE Perform includes a variety of administrative tools designed to manage the system as efficiently as possible.

Survey Manager

Using the NICE Perform Survey Manager, users can create and manage surveys to be used in the NICE Perform Feedback application.

User Administrator

The NICE Perform User Administrator is a collection of tasks that enable the system to reflect the customer-specific environment and requirements.

Organizational groups can be created to allow the administrator to easily define an organizational hierarchy that reflects the organizational structure, including nested groups. Groups can also contain application users and agents. The privileges and profiles mechanism was designed to meet the requirements of organizations with complex structures, including multinationals or outsourcing bureaus.
System Administration
This application is an easy-to-use, single point of administration for all system servers and components, including the voice and screen recorders, the Interaction Center, Application Center and Audio Analysis Capture unit, the NICE Storage Center and more. The management of multiple sites is supported.

Lexicon Manager
This NICE Perform application enables users to create and organize hierarchies of groups of words and phrases to be used for word spotting processing. These hierarchies can be accessed and used from applications that use functionality related to audio analysis.
Figure 18: Lexicon Manager
Afterword

Only the range of information sources available in NICE Perform, together with this new solution’s ease of use, visualization and distribution features can deliver the insights from interactions and powerful results that every service organization can immediately put to use.

Maximum performance, creating and using insights developed from interactions is now at your fingertips. Imagine how far you could go with NICE Perform if you could leverage it today.