



# CUSTOMER SUCCESS

## Best Practices Continuous Learning Opportunities

2015 Survox Summit

# Best Practices Continuous Learning Opportunities



- ⌘ Why is this important to you?
  - ▣ We all can continuously learn
  - ▣ Use our tools to expand your knowledge
  
- ⌘ Agenda
  - ▣ Best Practices
    - ▣ Documentation
    - ▣ Webinars
    - ▣ Trainings/Demos
    - ▣ Website
    - ▣ Community Tools
  
- ⌘ Participants – Client Testimonials
  
- ⌘ Next steps -- Use documentation, attend webinars, utilize demos . . . .

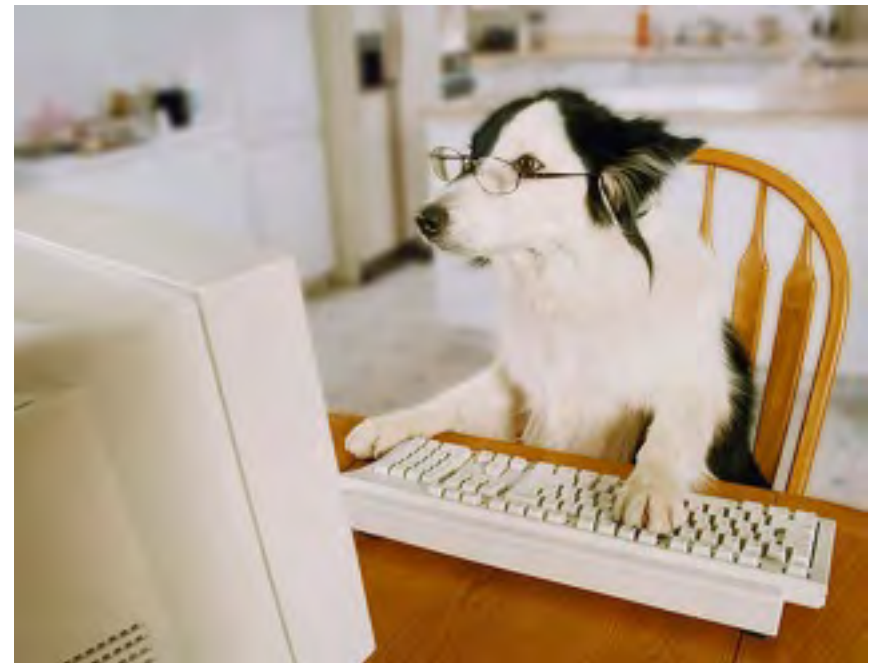
## Best Practices

HAVE YOU  
HEARD?



# KBA's (Knowledge Base Articles)

<http://survox.force.com>



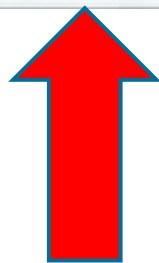
# What is a KBA?

- Knowledge Base Article
  - Found in the Self-Service area of Remedyforce
  - Articles that consist of FAQ's, How-To's, Known Errors, Problem Solutions
  - Over 300 KBA's



## View Self Help Articles

Browse and search for Frequently Asked Questions (FAQs) or articles that may provide helpful information.



Common Service Requests

**Popular Self Help Articles**



Information on the Zone Table



2014 Users Conference Presentations-Day 1



v8.7.1 Release Prospective



HTML commands and meanings



Number of Calls vs Number of History Slots vs Number of Attempts



How to set up a Master Quota study using the Survox Console



JS File Changes/jQuery Functions/Latest JS files



2014 Users Conference Presentations-Day 2

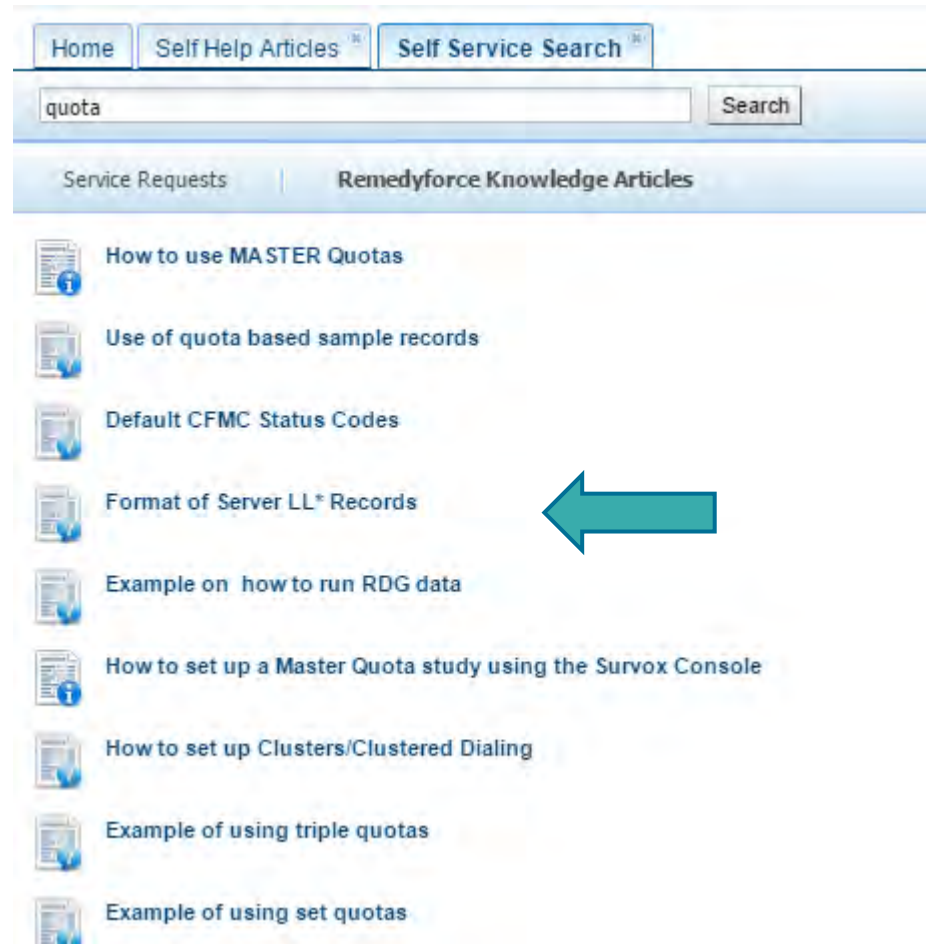


2014 Users Conference Squeaky Wheel Questions and Answers



Setting up Multi-Language Studies

# How to find a KBA – Search



# How to find a KBA – Browse

The screenshot displays a web interface with two main sections:

- Categories (Left Panel):** A tree view showing a hierarchy of categories. The 'Product' category is expanded, and 'Survent' is selected. Under 'Survent', the item 'Product - Survent - Quota Management' is highlighted with a green arrow.
- Self Help Articles: Product - Survent - Quota Management (Right Panel):** A list of six articles. The first article, 'How to use MASTER Quotas', is highlighted with a green arrow.

The list of articles includes:

- How to use MASTER Quotas
- Example of using numbered quotas
- Example of using triple quotas
- Example of using set quotas
- How do I fix up the quota file if I get a crc error when loading the study?
- "QSS" Quota Screen Enhanced with Automatic Dialer Return Statuses

# KBA Example – Printable View

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## KBA53 - Information on the Zone Table

### Answer

What is the Zonetabl?

The zonetabl is a file that is in the control sub-directory that maintains a relationship between the area code a phone number has and what time zone it is in. When a phone number is added into a .fon file the system uses that table to determine which time zone to store the number under. This allows the system to make sure calls to specific phone numbers are made at the appropriate time.

Note, any given phone number can have its time zone designation in the zonetabl overridden by putting the time zone number in columns 23-24 of the raw sample record. The use of this option is getting more and more common as more and more respondents have cell phones with area codes that no longer correspond to their current location.

How do I obtain the latest Zonetabl?

The latest zonetabl is attached to this article in the zip file zonetabl.zip. There are other files in the zip which may also be useful if you are updating the zonetabl. They are all described in the file zonetabl.txt, which is also pasted in here.



A background graphic consisting of a network of interconnected nodes and lines. The nodes are represented by small circles and squares, and the lines are thin, light blue lines. The overall color scheme is a gradient of blue, from a lighter teal at the top to a darker blue at the bottom. The network is dense and complex, with many overlapping connections.

Have you used the KBA's?

Feedback

# Documentation

<http://docs.survoxinc.com>

# Documentation

## ■ We've heard our clients

- New Doc Site
- User Friendly
- Work in Progress

"I was not aware of the new documentation site."  
Pat Costello, LHK Partners

"I like this format."  
Rhoniel Espiritu,  
Davis Research

# Documentation Site



## What's New in 8.8

- Simplified and Streamlined the Import Sample Process
- Made IVR Programming and Survey Creation Easier and More Efficient
- Provided Third-Party Multi-Mode Integration (with Qualtrics)
- Developed a New Look and Feel (Our Themes) for Ease of Use – Survox® Console Interface
- Expedited and Simplified the Release Installation Process

## About the New Features:

### IMPORT SAMPLE

Importing sample has been dramatically simplified in this release. We've brought in a wizard to lead you through the steps and consolidate them into one location. With this new capability, there's no need to remember a variety of steps and commands. Simply start at the top of the screen and answer the questions while the wizard guides you through the process.

**8.8.3+**

Available only in release 8.8.3 or later.

Search



### YOU ARE HERE:

What's New

Introduction

Basic Prepare Specifications

Advanced Prepare Specs

Chapter 4a: Conducting the Interview

Chapter 4b: Conducting the Interview (cont'd)

Chapter 5: SURVENT Utilities

Chapter 6a: The Phone System

Chapter 6b: The Phone System (cont'd)

### Topics

Blow Error Messages

Monitoring (Monitoring and Stations)

Appendix 1-Abbreviation Table

# Documentation Page

## Valid Subtypes

- Alphabetic\_Only
- Blank\_Ok
- Blank=
- Date\_Format
- Email\_Check
- Get\_From\_HTML\_Variable
- No\_Echo\_For\_Password
- Numeric\_Only
- Phone\_Number\_Format
- Use\_Previous\_Answer

## DATE\_FORMAT

Shortform: VAR,DATE

Accepts a date/time string and returns "yyyymmddhhmmss".

You can enter a date/time as if you were at the "Enter time to call" prompt (See *Interviewing with Phone System* for valid formats of the date/time to enter) and Survent will return the julian date/time in the data. You can then use this date/time to control the PHONE,SET\_CALL\_STATUS,104 (or 160-179) statement's time to call. This means you can format your own screens to get the time to call as well as control the input to be within certain parameters, etc.

The width must be at least a length of 14 to accommodate the returning Date/Time.

EXAMPLE:

```
{ QDATETIME: .14
Enter the date and time to call the respondent in respondent's time:
!VARIABLE,DATE_FORMAT }

{ XDATETIME:
!PHONE,SET_CALL_STATUS,104,QDATETIME }
```

# Cross-Reference Appendix

QUESTION TYPE	ABBREVIATION	KEYWORD	SUBOPTION ABBREVIATION	SUBOPTION KEYWORD
FIELD	A	USE_PREVIOUS_ANSWER		
FIELD	B	BLANK_OK		
FIELD	I	INCLUDE_EXCLUDE	IL	INCLUDED_LABELS
		INCLUDE_EXCLUDE	XL	EXCLUDED_LABELS
		INCLUDE_EXCLUDE	IR	INCLUDED_RESPONSES
		INCLUDE_EXCLUDE	XR	EXCLUDED_RESPONSES
		INCLUDE_EXCLUDE	WSXR	WEB_SURVENT_EXCLUDE_RESPONSES
FIELD	J	SHOW_TEXT_RESPONSES_ONLY		
FIELD	M	MATCH_TEXT_WHEN_HIGHLIGHTCATS		

# Embedded “How-To” Videos

## Video on adding a new user

The screenshot shows the SURVOX Admin console. The top navigation bar includes: ADMIN, PROJECT CREATION, PROJECT SETUP, DEPLOY, MANAGE, PROJECT TRACKING, DATA ANALYSIS, SHARED FILES, and HELP. The left sidebar has a menu with: Overview, Add New User, Edit User, Add Security Type, Edit Security Type, Add Client, Edit Client, View Logs, Usage Reports, and Setup Help. The main content area is titled "Admin" and contains several sections: "Ready to administer your Survox Console experience?", "Need to customize the Survox Console interface?", "Need reports on activity across your installation?", and "Have a problem with your project?".



## Video on running a Verbatim listing

The screenshot shows the SURVOX Data Analysis console. The top navigation bar includes: ADMIN, PROJECT CREATION, PROJECT SETUP, DEPLOY, MANAGE, PROJECT TRACKING, DATA ANALYSIS, SHARED FILES, and HELP. The left sidebar has a menu with: Overview, View Logs, Custom Run Tables, On-Demand Tables, Data Analysis, Upload Files, Download Files, and Review Comments. The main content area is titled "Data Analysis" and contains sections: "Ready to analyze your data?", "The Data Analysis section allows users to create and view reports for copying, saving and deleting. Reports can be generated using Web Tables and On-Demand Tables. Data Listing includes Data Tools to help you change the layout, column filter, download files. Generated reports can be also downloaded and generated. Also, you can use the report to share packages. All found in this section. Also, you can use the ability to view and edit reports (reports) and Upload and Download Files for reports. Reports documents and files are used to view reports and reports generated.



A network diagram background consisting of a complex web of thin blue lines connecting various nodes. The nodes are represented by small circles and squares of varying sizes and colors (white, light blue, dark blue). The overall color scheme is a gradient of blues, from light to dark.

Have you seen or used  
the new docs site?

Thoughts? Improvements?

What other “how-to” videos  
would you like to see?



# Monthly Webinars



# Monthly Webinars

- Held once a month
- Cover various topics
- Productive way to learn
- Pay Attention to Email Communications!

“I found the webinars  
useful, relevant,  
interesting, good.”  
Davis Research



# Past Webinars

- Rotations
- Implementing Innovative Surveys
- Validating & Building Data Integrity into your Surveys
- Optimize your Call Center Operations with Quota Management

## List of Webinar Recordings

NOTE: Access to these webinars require the attendee provide name, contact info etc.

### Phone Surveys

August 21 Best Practices Technical Webinar: Optimize Your Call Center Operations with Quota Management

Recording: <https://attendee.gotowebinar.com/register/4396231585898041858>

Powerpoint: <http://dev.docs.survoxinc.com/wp-content/uploads/2015/09/August-21-Best-Practice-Technical-Webinar-Optimize-Your-Call-Center-Operations-with-Quota-Management.pptx>

July 24 Best Practice Technical Webinar: Validating & Building Data Integrity into Your Surveys

Recording: <https://attendee.gotowebinar.com/register/7205381539641295618>


Powerpoint: <http://dev.docs.survoxinc.com/wp-content/uploads/2015/09/July-24-Best-Practice-Technical-Webinar-Validating-Building-Data-Integrity-Into-Your-Surveys.pptx>

May 29 Best Practice Technical Webinar: Randomizing Multi-mode Survey Questions and List Items

Recording: <https://attendee.gotowebinar.com/register/3466426277338959362>

Powerpoint: <http://dev.docs.survoxinc.com/wp-content/uploads/2015/09/May-29-Best-Practice-Technical-Webinar-Randomizing-Multi-mode-Survey-Questions-and-List-Items.pptx>

“I REALLY like that you are doing these and hope you keep doing them on different topics.” - LHK Partners

The background of the slide is a light blue color with a network diagram pattern. The diagram consists of numerous thin, dark blue lines connecting various nodes. Some nodes are represented by small circles, while others are small squares. The connections are dense and crisscrossing, creating a complex web-like structure. The nodes are scattered across the entire background, with some clusters and some isolated points.

What future webinars  
would you like to see?

# Training




# Training

## Methods

- On-Site
- Virtual Meeting(s)
- Services can provide “mentoring”

## Training Topics

- Survox Multi-Mode Platform
- Survox Online
- Survox Phone migration from Terminal Mode
- Survox Console
- Survox Dialer/Survox IVR
- Mentor
- Supervisor Training
- Software Administration

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Are there any training  
topics you'd like to  
see added?

# Demos

# Continuous Learning





# Demos - Opportunities to Learn

## See New Features

- Upgrading
- New product adoption
- See how new features work
- Schedule one today

## Showcase Your Services

- Use existing tools for self-service
- Build out your own website of services using our tools
- Showcase software capabilities
  - Features Demo
  - Advanced Training Site

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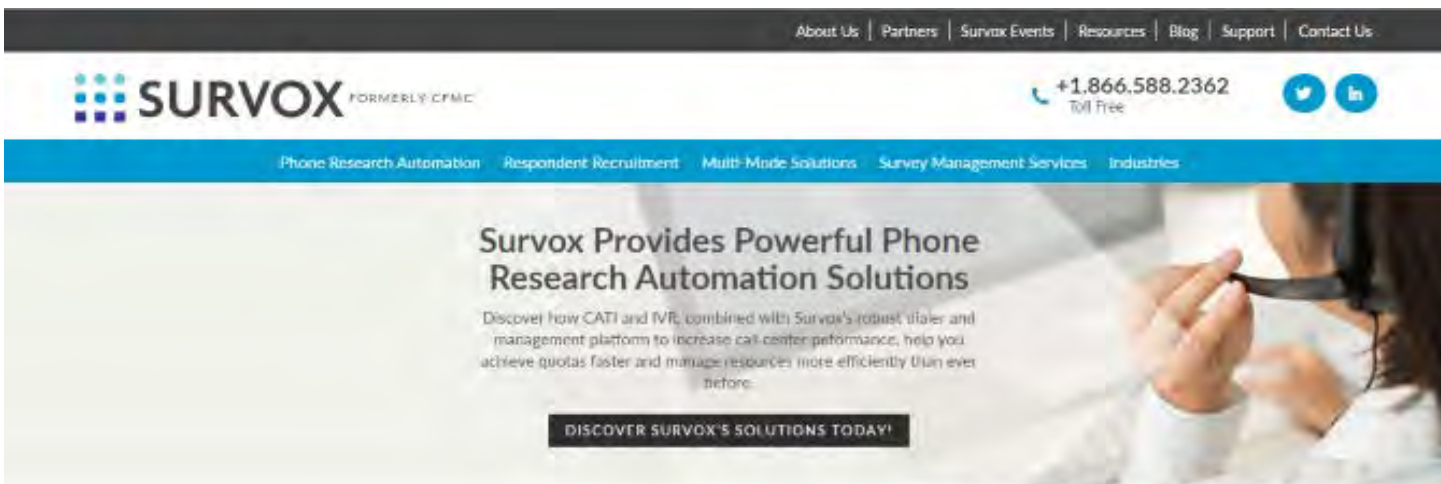
What would you like  
to see in Version 2?

# Survox Website

<http://www.survoxinc.com>

# Survox Website

- New Website!
- In-Depth Product Information
- White Papers
- Demos/Videos
- Use Cases



## Our Services

Discover how Survox's platform will help you.

# Community Resources

# Community Resources

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## ■ LinkedIn

- SpecTalk has been deprecated!
- Survox LinkedIn group
- Peer to Peer communications

## ■ Twitter

- Industry Feeds

## ■ Newsletters

- What's happening with Survox

## ■ w3schools.com

- Web-Based Tutorials



# Next Steps

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- Share this presentation with your co-workers
- Review your processes for self-learning improvements
- Join LinkedIn or Twitter
- Sign up for webinars
  
- Learn more at [docs.survoxinc.com](https://docs.survoxinc.com)
- Review Webinars at [docs.survoxinc.com/v88/webinars](https://docs.survoxinc.com/v88/webinars)
  
- Visit our Survox Services Center
  - Request a demo
  - Request training

The image features a background of a network diagram with various nodes and connecting lines. The top and bottom sections are light blue, while the middle section is black. The network consists of several clusters of nodes. Some nodes are represented by circles, some by squares, and some by smaller dots. Lines connect these nodes, creating a complex web of relationships. The overall aesthetic is clean and technical.

Questions?





[WWW.SURVOXINC.COM](http://WWW.SURVOXINC.COM)