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....

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Best Practices

HAVE YOU HEARD?

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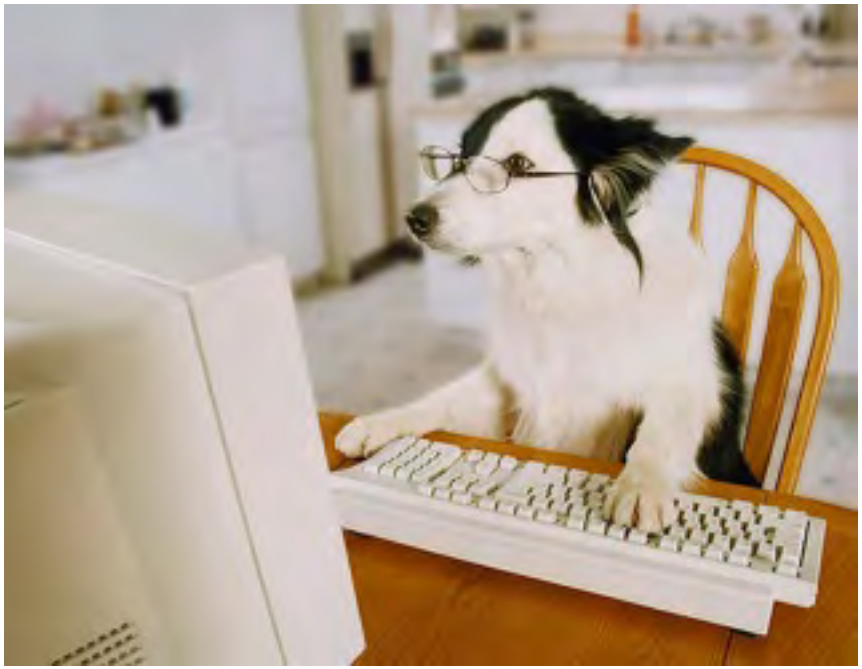
KBA's
(Knowledge Base Articles)

http://survox.force.com



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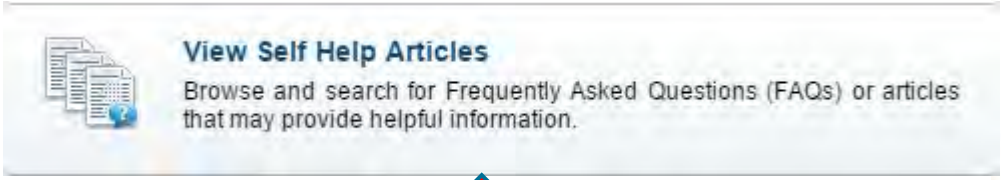
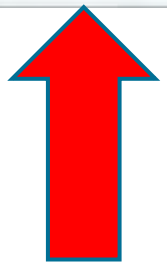
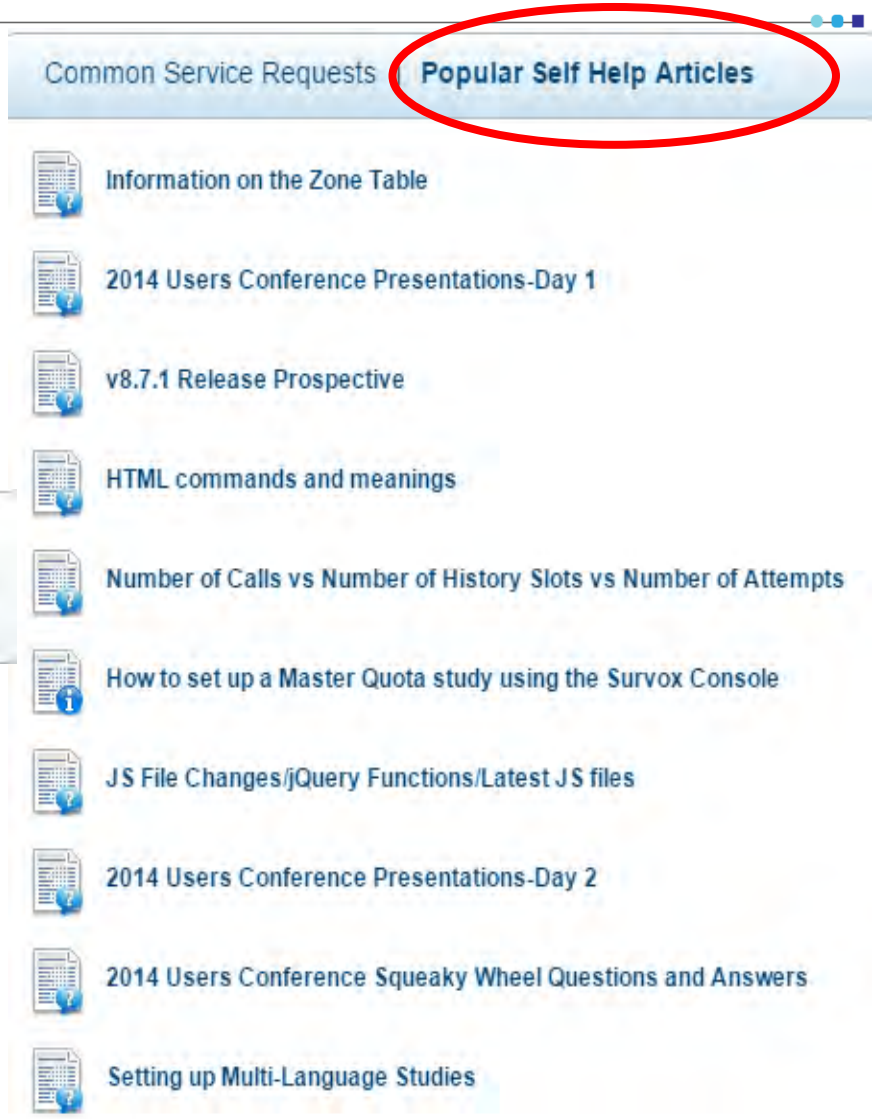
What is a KBA?

- 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







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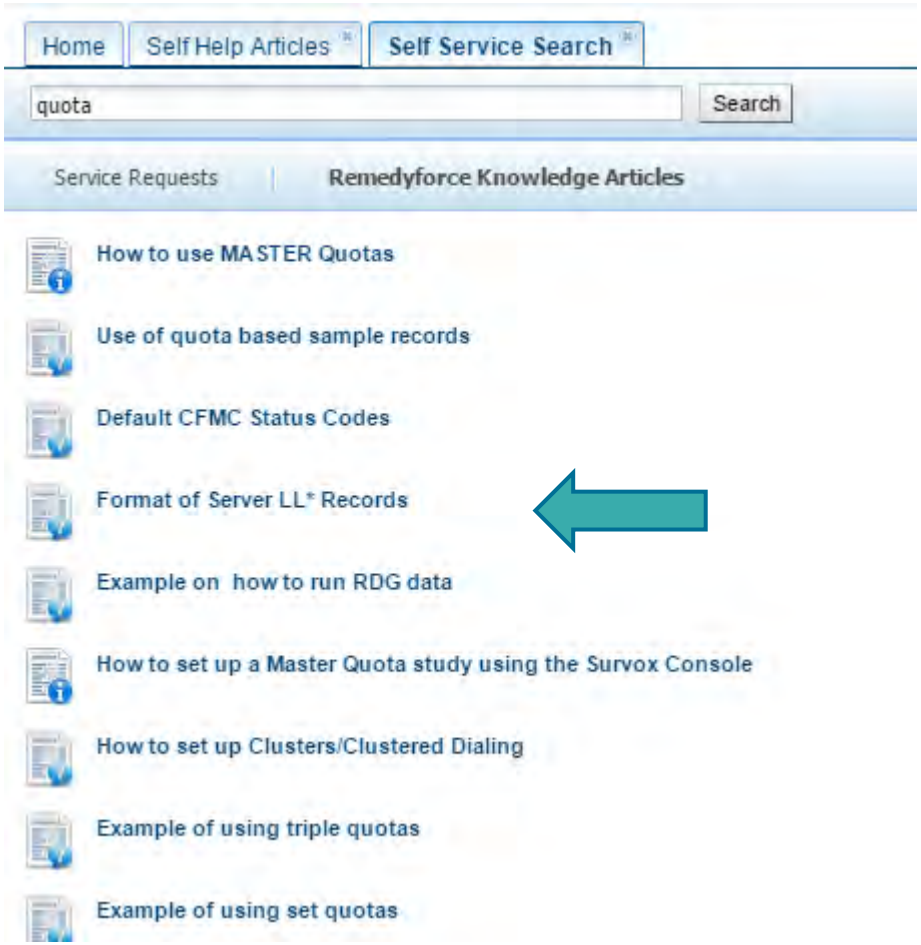
How to find a KBA – Search



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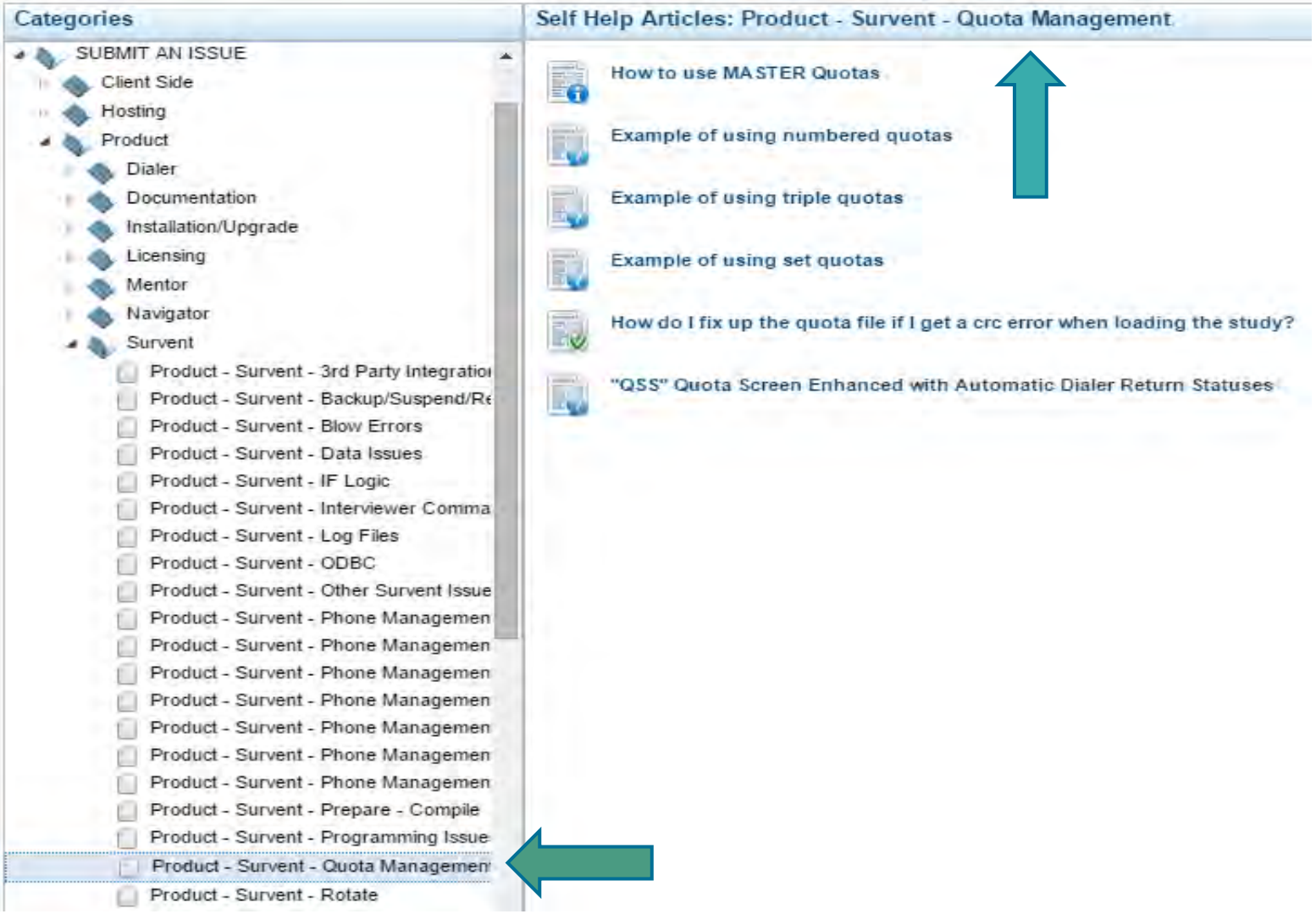
How to find a KBA – Browse



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KBA Example – Printable View

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 deterimine which time zone to store the number under. This allows the system to make sure calls to specific phone numbers are made at the approprate 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.

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Have you used the KBA's?

Feedback

Documentation

http://docs.survoxinc.com

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Documentation

- We've heard our clients
  - New Doc Site
  - User Friendly
  - Work in Progress

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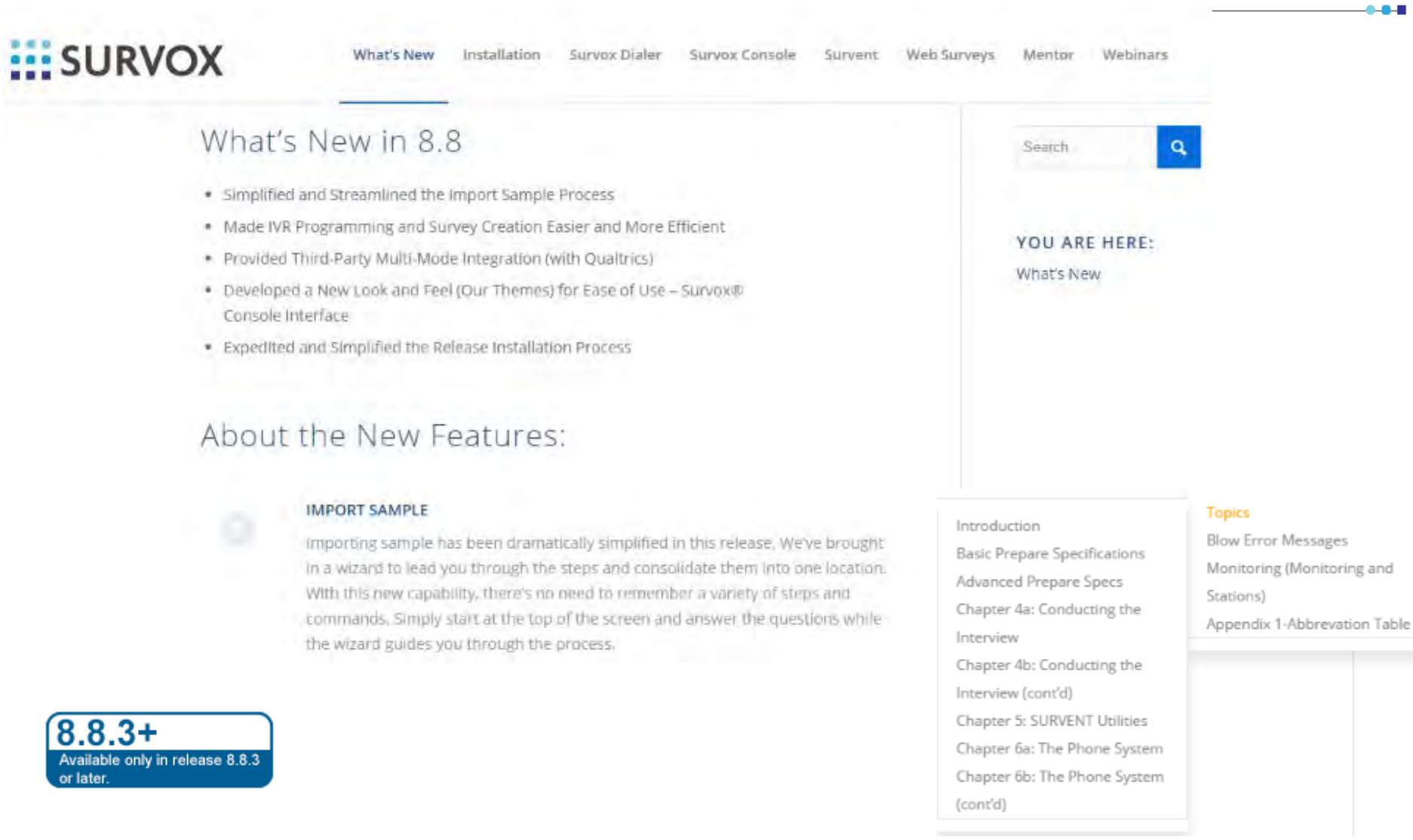
Documentation Site



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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 }
```


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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		

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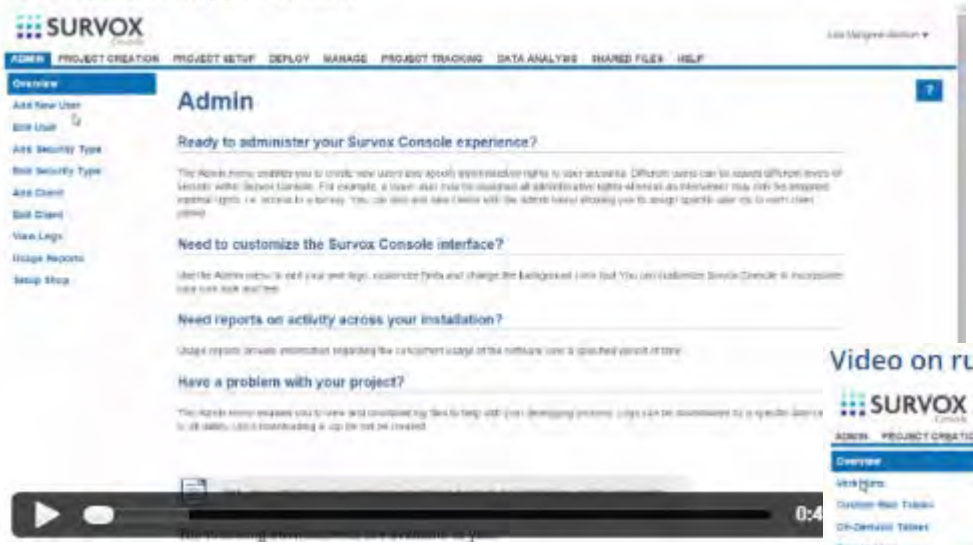
Embedded “How-To” Videos

Video on adding a new user



Video on running a Verbatim listing

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Have you seen or used the new docs site?

Thoughts? Improvements?

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

Monthly Webinars

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Monthly Webinars

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

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

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Past Webinars

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

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

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

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What future webinars would you like to see?

Training

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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

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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

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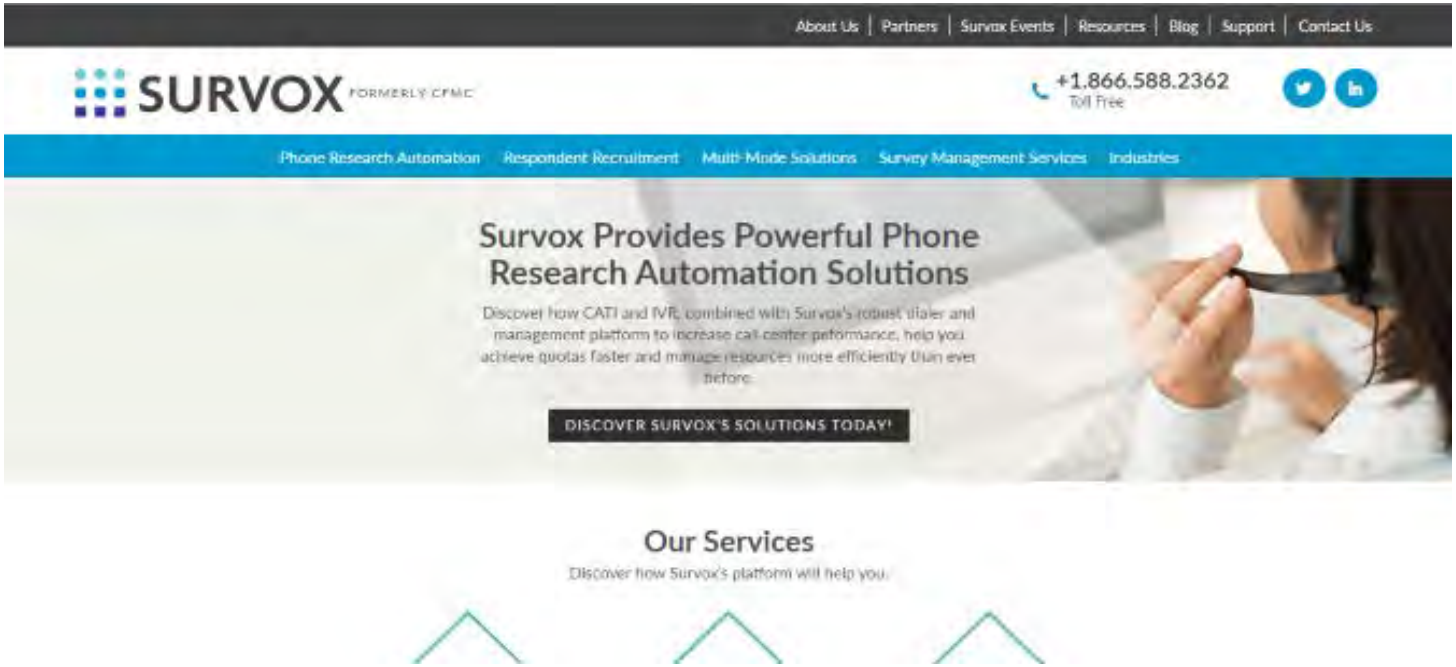
Survox Website

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



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Community Resources

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Community Resources

- 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

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Next Steps

- 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
- Review Webinars at docs.survoxinc.com/v88/webinars

- Visit our Survox Services Center
  - Request a demo
  - Request training

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Questions?

WWW.SURVOXINC.COM