

# CalSAWS | Notes from IVR/Contact Center Committee Meeting

<b>Date:</b> September 25, 2019	<b>Notes Location:</b> SharePoint > Application Development > Committees > IVR-Contact Center > Year Month Day
<b>Time:</b> 10:00 am – 3:00 pm	<b>Meeting Materials:</b> IVR/CC Agenda SCR Long Descriptions SCR Tracking Log
<b>Meeting Called by:</b> Darcy Alexander	

<b>Attendees:</b>	R1 <input checked="" type="checkbox"/> Curt Dodson	R4 <input checked="" type="checkbox"/> Dwight Bristow	<input checked="" type="checkbox"/> Jared Kuester
	R1 <input checked="" type="checkbox"/> Esmeralda Rouse	R4 <input type="checkbox"/> <del>Sheila Standridge</del>	<input checked="" type="checkbox"/> Stacey Xiong
	R1 <input checked="" type="checkbox"/> Moises Martinez	R4 <input checked="" type="checkbox"/> Valerie Rangel	<input checked="" type="checkbox"/> Danielle Benoit
	R1 <input checked="" type="checkbox"/> Monica Castillo	R5 <input checked="" type="checkbox"/> Angelica Ruiz	<input type="checkbox"/> <del>Melissa Mendoza</del>
	R1 <input type="checkbox"/> <del>Thomas West</del>	R5 <input checked="" type="checkbox"/> Darrin Kearney	<input checked="" type="checkbox"/> Gerald Limbrick
	R2 <input type="checkbox"/> <del>Jesse Halford</del>	R5 <input checked="" type="checkbox"/> Corrinne Simpson	<input checked="" type="checkbox"/> Matt Lower
	R2 <input checked="" type="checkbox"/> Marisol Jimenez	R5 <input checked="" type="checkbox"/> Eric Rubio	<input type="checkbox"/> <del>John Dray</del>
	R2 <input checked="" type="checkbox"/> Tina Baker	R5 <input checked="" type="checkbox"/> Jason Garrett	<input checked="" type="checkbox"/> John Lavayen
	R2 <input checked="" type="checkbox"/> Logan Pratt	R6 <input checked="" type="checkbox"/> Mariel Reguindin	<input type="checkbox"/> <del>Liliana Trujillo</del>
	R3 <input checked="" type="checkbox"/> Danielle Smith	R6 <input type="checkbox"/> <del>May Gayton Jacob</del>	<input type="checkbox"/> <del>Inez Cabrera</del>
	R3 <input checked="" type="checkbox"/> Jamie Butcher	R6 <input type="checkbox"/> <del>Rada Mesely</del>	<input type="checkbox"/> <del>Sam Sway</del>
	R3 <input checked="" type="checkbox"/> Monique Upshaw-Smith	R6 <input checked="" type="checkbox"/> Sonia Lopez	<input type="checkbox"/> <del>Ana Cruz</del>
	R4 <input checked="" type="checkbox"/> David Mata-Fresno	R6 <input checked="" type="checkbox"/> Mario Palacios	<input checked="" type="checkbox"/> TJ Singh
	R4 <input checked="" type="checkbox"/> Diana Berlanga		<input checked="" type="checkbox"/> Nichole Nava - RM

**Notes Taken By:** Region # 1-Monterey County

## Agenda Topic:

## Important Points

### Introduction of New Members:

- Welcome everyone to the IVR Committee!

### Meeting Notes:

- Region 1 (Esmeralda Rouse) is responsible for Meeting Minutes
- Counties are required to provide completed Meeting Notes to the CalSAWS Project no later than two weeks from the date of the IVR/Contact Center Committee Meeting due to a new process which requires Meeting Notes to be posted within 3 weeks of the Committee Meeting.
- Region 2 will be responsible for Meeting Minutes on January 22, 2020



CalSAWS Committee Notes Policy.docx

Meeting minutes will rotate by regions. I.e. R1, R2 etc.

If a region is not in attendance the next region will take the meeting notes. At the next meeting the region that was absent will take the meeting minute notes.

## Agenda Topic:

### IVR-Contact Center Committee Schedule:

- Review Committee Meeting Frequency/Delivery
- 
- Item 3

### Welcome to CalSAWS Committee PowerPoint:

- Darcy will send Committee Invite, Committee Agenda, and Documents prior to each meeting



Welcome to CalSAWS  
Committees.pptx

- When unable to attend a committee meeting

## Important Points

- Committee voted to have Quarterly Meetings-
  - Meetings will be onsite at the CalSAWS project
  - Time 10a.m.-3p.m.
  - 4<sup>th</sup> Wednesday of the month
  - Quarter starts in January 2020
- If Darcy needs to meet before the next meeting, she will schedule a webcast
- Travel arrangements should be made to attend the entire duration of the meeting

- Committee should look over material prior to each meeting
- Pass on information to other counties in your region and your county SMEs.
- Questions from SMEs should be funneled through the RCM.
- If sending a person in your place when unable to attend, Darcy must be notified.
- IF a person will replace you on the IVR Committee the request needs to go through the RCM.

### Best Practice Meetings:

- **WFM**

- **Contact Center**

- These meetings will no longer be held
- These meetings will no longer be held

### Amazon Connect Status Update:

- **C-IV Counties transition to AWS**
- **Monthly Amazon CALWIN Calls are ongoing**
- **Amazon High Level Overview- John Lavayan**

- This impacts C-IV counties only.
- CALWIN Counties are not impacted.
- Darcy will send CALWIN the PowerPoint Deck for Amazon Connect
- Looking at more AI (artificial intelligence) with Amazon Connect
- EGain and Calabrio will continue to be used with Amazon Connect
- Amazon is on schedule for release for Marin- 1<sup>st</sup> county to Go Live in November 2019
- Training plan is starting to be put together at the county levels

## Agenda Topic:

## Important Points

- Training plan will be treated as a roll-out: WFM, Agents, and Supervisors
- Management at the counties will see the training beforehand
- Training timeframes will be discussed at meetings with the individual counties to meet individual county needs
- Goal is to meet with all counties by end of October
- Communication will be sent to all counties when Marin goes live

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### eGain VIM Cloud Version 17.2 Update:

- Progress of transitioning C-IV Counties to a new version
- **Amazon High Level Overview- John Lavayen**
- This includes the Amazon Connector
- The upgrade will capture Cisco and Amazon data for Go Live
- New report types will need to be created in EGAIN – this will be done by C-IV
- Agents will be linked in from Cisco

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### Calabrio Scheduling Adjustments Functionality:

- Can Add, Email, remove button be added as possible enhancements in Calabrio?
- Jared to follow-up regarding dashboard widgets for average time per call.
- Can break, lunch, and exceptions be added to messaging?
- C-IV will ensure Calabrio 10.4 is up for 90 days after last Go Live County
- Will be looked at after Amazon Go Live
- Will look at this in Calabrio 11
- NO- Can be looked at in the Calabrio Cloud Version
- Counties will need to download any calls that need to be retained. Calabrio recordings QM will not transition to the Cloud

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### Discussion to Remove Agents Ability to Hear Their Recorded Calls:

- This was tabled from the July 24,2019 Committee Meeting
- Global Setting-Vote to Remove or keep Ability
- Committee voted to keep

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**Update on NICE/IEX:**

- NICE/IEX will be discontinued as of November 1, 2019
- Calabrio version 9.5 also being discontinued as of November 1, 2019, all schedules in 9.5 should be moved to 10.4 by November 1<sup>st</sup>.
- Committee all informed of both IEX and Calabrio 9.5 being discontinued as of November 1, 2019.

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**Top 10 SCRs:**

- Top 10 IVR/Contact Center SCRs
- Darcy will send this
- Committee to consolidate 1-10 and submit 1 regional vote
- Votes will be done semi-annually

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**Discussion:**

- **Texting**
  - Some counties in Region 5 opt all customers in for text messaging
  - Per FCC regulations C-IV counties require the customer to opt in.
  - John would like more information if there is a legal way that this is being done and C-IV has not explored
- **San Bernardino- IVR Update**
  - Opened discussion to update the IVR for CF customers to be able to obtain the T&B and S&B benefits in the IVR and text messaging
  - A CER needs to be submitted, however may not be reviewed until after Amazon if it needs to be a separated allotment. If the benefit amount is a sum of all CF benefits it may be able to go to the Batch Team.
  - San Bernardino will discuss with their team and submit a CER as appropriate

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**(Optional Items)**

#	Action Item	Assigned To	Assigned Date	Due Date	Status
1	Is a Webcast Option available for these meetings?	Danielle Benoit	9/29/2019	January 2020	Pending
2	Amazon Connect PowerPoint	Darcy Alexander	9/29/2019		Sent 9-26-2019

3	Request to Calabrio to remove or greatly extend the time out functionality	Jared	7/24/2019	9/25/2019	Requested
4	Counties want the bigger and more user-friendly widgets	Jared	7/24/2019	9/25/2019	NO ETA or decision if Calabrio will do this
5	Counties want Pop-Ups for breaks and lunches  <b>This functionality is not currently available in Calabrio</b>	Jared	7/24/2019	9/25/2019	This is not slated for a future request at this time.

#	Decision Made	Who Made the Decision	Date
1	Vote taken to move Committee Meetings from Bi-Monthly to Quarterly beginning in January 2020 with all meetings held onsite	Committee	9-25-2019
2			

[Next Scheduled Meeting – January 22, 2020 from 10:00 AM to 3:00 PM - Onsite:](#)

