



Improve Customer Experience

AIVA Implementation the Easy Way •

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Introduction

This Document provides an overview of what the LiveVox Artificial Intelligence (“AI”) Virtual Agent (“VA”) is and describes the process for an Implementation project.

What Is AIVA?

Artificial Intelligence can be complicated and intimidating on the surface. LiveVox makes AI simple to understand and implement. It provides capabilities that are easy to deploy and optimize, so you can get your operations up to speed now. Added to that, our AI supports all languages.

AI Virtual Agents (AIVA) are becoming the hot commodity in the customer service market. They can lower customer service costs in the following ways.

- Create Improvements without Trade Offs
- Increase Capacity
- Improve Customer Experience
- Improve Agent Experience
- Handle multi-step flows
- Improve Key Performance Indicator (KPI) metrics

AI is meant to emulate human behavior and the implementation of AIVA is meant to be deployed incrementally. During the implementation you will note key improvements to your agent training process. For example, when AIVAs are trained, they perfectly remember the training and apply the learning process to every phone call. Additionally, as a part of the AIVA Implementation you will have the option to tune your AIVA. Tuning refers to training and retraining the AI to improve intent recognition. Within the Conversational AI Platform is a list of every transaction within the caller's conversation. A user may select any transaction where an intent may have been incorrectly matched and retrain the AI with a few clicks of a button. A key task of the implementation and testing process will be this training and retraining as frequently as possible. The desired objective is to have in place prior to formal product launch target intent resolution with a confidence score greater than or equal to seventy percent (70%). Post Implementation tuning can be completed as necessary to improve intent matching.

The LiveVox Portal (LVP) in tandem with the Conversation AI platform provides our clients with flexibility. For example, Account verification can be completed using the LiveVox Contact Manager product or can integrate with customer's external systems via API Integration. The key factor in determining the optimum solution is response time. Using LiveVox contact manager, the delay between caller speech and AIVA response is approximately two to four seconds. Any external API Integration should strive to keep the same response time for a positive caller experience. A capability exists to provide callers with a waiting sound (e.g. keyboard typing), but long delays are not ideal.

AIVA can assist your callers with tasks like

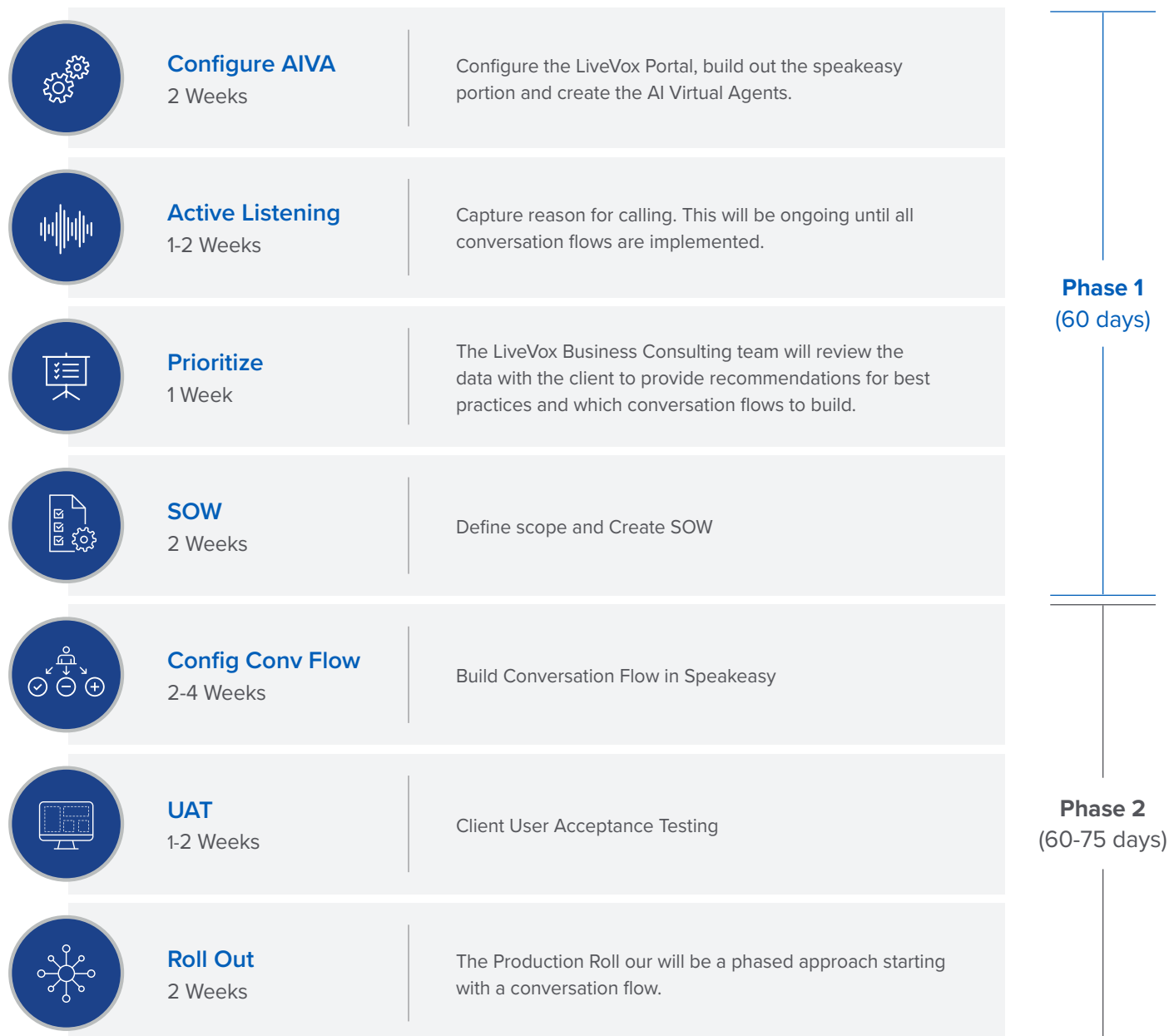
- Make A Payment
- Record details for Refuse to Pay (E.g. Bankruptcy Claims, Dispute, Deceased)
- Answer Frequently Asked Questions (FAQ)
- Schedule an appointment
- Obtain Account Balance
- Request Letters (E.g. Paid in Full, Settlement in Full, or Account Status Letter)
- File a Fraud Claim
- Provide Company Details (E.g. Company mailing address, website, phone number, Hours, directions)
- Address wrong number calling
- Accept a General Complaint
- Gather various data from the caller (E.g. Insurance Claim details, phone numbers etc.)
- Provide Caller Specific Details (E.g. Product Warranty Info.)
- Check Company Inventory

What is the process for an AIVA Implementation?



An AIVA Project will be implemented in two phases.

1. **Intent Capture** – This is a fact gathering phase that will help prioritize the most used conversation flows and assist with areas to concentrate on first.
2. **Conversation Flow Implementation** – Single Conversation Flow implementation that will be repeated for multiple conversation flows.



Phase One (Intent Capture)

The Purpose of the AIVA Startup phase is to implement the AIVA Platform to capture the reason the client is calling in (Active Listening). Once the reason is obtained the call will be transferred for normal call flow processing. The analysis of the reason for calling data will drive the discussion on the conversation flows to implement based on the most common reasons a caller is calling in.

Phase Two (Conversation Flow Implementation)

Phase two is recommended to be an incremental implementation of the Conversation Flows the client would like to implement. With an incremental approach, progress can be evaluated faster while additional conversation flows are scoped and implemented. Conversation Flows be categorized as follows:

- No Data Lookup Required (E.g. FAQ, Office Hours, mailing address)
- Internal Data Lookup Required (E.g. Bankruptcy)
- External Data Lookup Required (E.g. Account Authentication via API Integration)

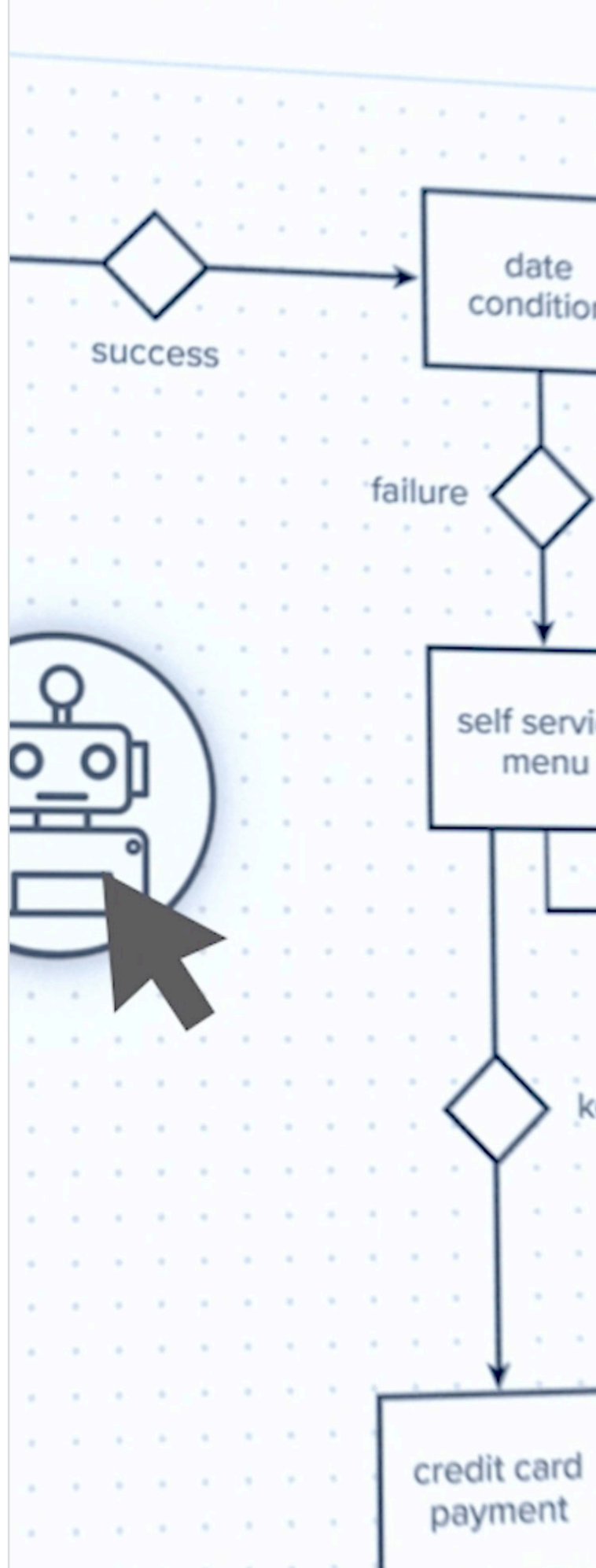
Examples of Conversation Flows

1. An FAQ is an example of a “no data required” conversation flow and may include the below intents.

- Office Hours
- Web Address
- Mailing Address
- Who Are You?
- What can you Do?
- Store/Company Locations
- Frequently Asked Questions Documentation
- Goodbye

2. Account Details or Make a Payment could be an example of “data required (Internal or external)” conversation flow. This type of conversation Flow could capture or fulfill the following intents

- Payment Amount
- Account Balance
- Next Payment Date
- Warranty Information
- Consumer Verification





Prerequisites

Currently, there are no specific prerequisites unless the client is interested in integrated omnichannel communications in-conversation. In this case, the client must use version U15 or higher.

Implementation Participants

LiveVox Team

Project Manager/ Project Coordinator

The LiveVox Project Manager or Project Coordinator will be Customer's single point of contact (SPOC) for your AIVA Project Implementation. This resource will coordinate with Customer's resources and coordinate all services for your AIVA Implementation.

Business Consultant

The LiveVox Business Consultant (BC) team will work with the client during the intent capture phase. Initial focus will be on analysis of the client's Call Center request traffic. The BC will derive not only why callers are calling but also the frequency of these requests as well as the time it typically takes a trained agent on average to process these requests.

The BC will collect the call data for analysis. Data collection will be generally confined to the Intent capture details collected during phase one of the AIVA project but may also include data visible from LiveVox's Business Intelligence data analytics platform.

Once the client's data has been analyzed, a summary report including diagrams

will be provided outlining the intents the LiveVox BC would recommend targeting for automation via AIVA.

After consensus has been reached on the Intents to address during the subsequent Implementation, the BC will work with the Product Consulting team advising on best practices and recommendations aimed at not just maximizing containment but on customer experience as well to ensure increase take rate and overall customer satisfaction.

Product Consultant

The LiveVox Product Consultant(PC) team will complete the AIVA Configuration and be the main technical point of contact for the lifecycle of the project. There may be one or multiple product consultants the client will work with as there will be multiple Phase Two portions of the project. The product consultant will not only provide the configuration of the AIVA and conversation flows but also provide the client with an overview of the setup and configuration.

Client Team

IT Personnel

The IT Personnel needed for the implementation may vary depending on

the scope of the project. IT Personnel would be asked to provide direction on the following items.

- External connectivity and overall system configuration
- If the Implementation includes API Integration, API developers for providing documentation and troubleshooting any API Integration issues

Subject Matter Expert (SME)

The Client SME (Operation Leaders/ Agent Experts) will provide various aspects of detail throughout the life of the project. These areas include:

- Input to the discussion/ documentation of the call flow/ routing procedures
- Participation in the creation of the mind map for the conversation flows
- Provide Human Agent Training documentation
- Lead/Participate Client UAT
- Participate in the Go Live Planning/ Roll out



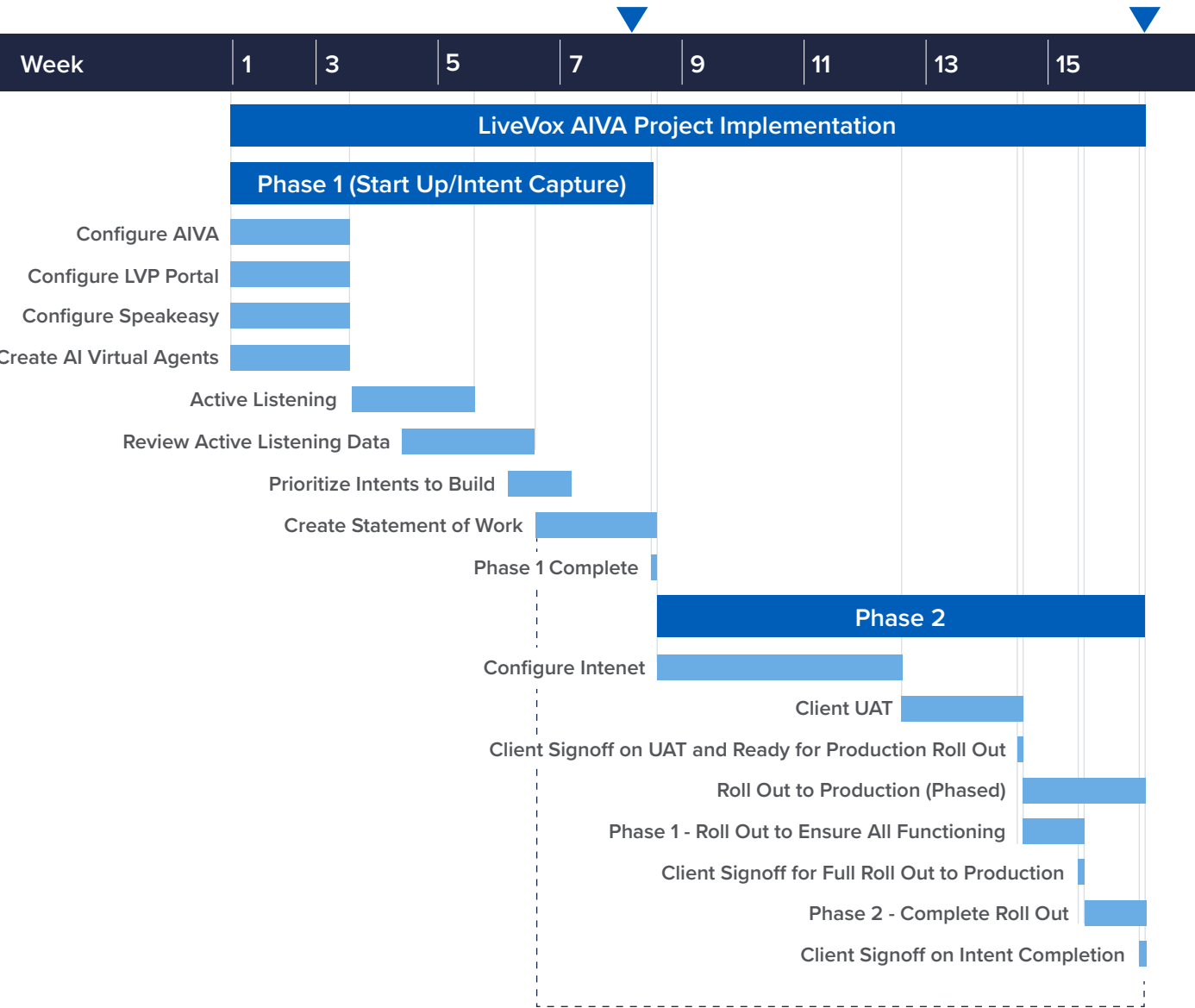
Implementation Timeline

**60
DAYS**

Phase One (Startup/Intent Capture) of an AIVA Implementation project is estimated at approximately sixty (60) days.

The first Phase Two (Intent Implementation) of an AIVA Implementation project is estimated at sixty to seventy-five (60-75) days depending on the complexity of the conversation flow.

Below is a sample timeline for an AIVA Implementation project. Note the steps that repeat for the number of conversation flows that will be built.



These steps will repeat for the number of conversation flows to build.



Implementation Process

Phase One

As previously mentioned, an AIVA Project will be implemented in two phases. The first phase is a fact gathering phase to assist with the determining the conversation flows to implement in the multiple Phase Twos.

Even though phase one is fact gathering, the actual implementation of the AIVA must be completed and input from the client will be required. The Greeting the callers will hear will require input from the client. For example, a greeting might be something like this:

“Hi, I am Oliva your virtual assistant. We are working to improve our customer service experience. In a few words, can you please tell me why you are calling in today?”

Additionally, our Product Consulting team may ask the client to provide their Human Agent Training Material. This Material will help build the conversation flows and intents for implementation.

Configuration (LiveVox Portal, Virtual Agents and Conversation AI Platform)

Your Product Consultant will work to complete the setup/configuration. One new Virtual Agent will be setup/configured in the LiveVox Portal (LVP) for phase one. Below are sample print screens of the Service and Agent Skill and Agent setup.

Services



Above is the initial services screen. The Agent setup screens can be seen on the following page.



Agent Skill

Agent Skill - AIVA Demo

Agent Skill ID: 3056407

Name:

Description:

Agent Mapping

Available Agent(s):

| Logon ID | Agent Team | First Name | Last Name | Proficiency |
|----------------------------------|------------|------------|-----------|-------------|
| <input type="checkbox"/> AARENAS | | Andres | Arenas | |
| <input type="checkbox"/> AGENT11 | | Brad | Fantana | |
| <input type="checkbox"/> AGENT10 | | Brock | Tamland | |
| <input type="checkbox"/> AGENT11 | | Veronica | Comington | |
| <input type="checkbox"/> AGENT12 | | Champ | Kind | |

Assigned Agent(s):

| Logon ID | Agent Team | First Name | Last Name | Proficiency |
|--|------------|------------|-----------|-------------|
| <input type="checkbox"/> BBANNER | Customer | Bruce | Banner | 1 |
| <input type="checkbox"/> LV_DEMO_AIVA000 | Virtual | Agent000 | | 1 |
| <input type="checkbox"/> LV_DEMO_AIVA001 | Virtual | Agent001 | | 1 |
| <input type="checkbox"/> LV_DEMO_AIVA002 | Virtual | Agent002 | | 1 |
| <input type="checkbox"/> LV_DEMO_AIVA003 | Virtual | Agent003 | | 1 |


Created By: Erik Hammel - Jan 03, 02:56 PM

Last Modified By: Erik Hammel - Jan 03, 02:57 PM

Agent - Info

Agent - Info

Info Channels Agent Skill Services Agent Hours Change History Scheduled Callback

 [Change password](#)

General

ID: 3906895

Logon ID: Email / SIP Address:

First Name: Last Name:

Wrapup Time:

Home Agent: ☒ Agent Team:

Cost Per Agent-Hr: Active Agent: ☒

Phone

Audio Path (Out): Extension:

Direct Line for Agent: Voicemail: ☐


Created By: Erik Hammel - 01/03, 14:40:09

Last Modified By: Erik Hammel - 01/03, 14:40:09

Agent - Services

Agent - Services

Info Channels Agent Skill Services Agent Hours Change History Scheduled Callback

 [Change password](#)

Service Mapping

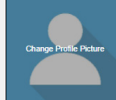
Search...

| Available | Assigned |
|----------------------------------|------------------------|
| AgentReg | AIVA Demo v2.0 Service |
| AI Virtual Agent Service | |
| AIVA Demo Dev Service | |
| AIVA Demo Human Transfer Service | |
| Care_Inbound | |
| Care_Outreach_hci | |
| Care_Outreach_p | |
| Care_Outreach_qc | |
| Care_Tier1 | |
| Care_Tier2 | |
| Chat_Basic | |
| Collections_Manual | |

Agent - Agent Skill

Agent - Agent Skill

Info Channels Agent Skill Services Agent Hours Change History Scheduled Callback

 [Change password](#)

Agent Skill Mapping

Proficiency 1

Search...

| Available | Assigned |
|-----------------------|-------------------------|
| AIVA | AIVA Demo Proficiency 1 |
| AIVA Dev Skill | |
| DepartmentA | |
| DepartmentB | |
| E-Commerce | |
| Multi Lingual | |
| Retention | |
| Universal Agent Skill | |

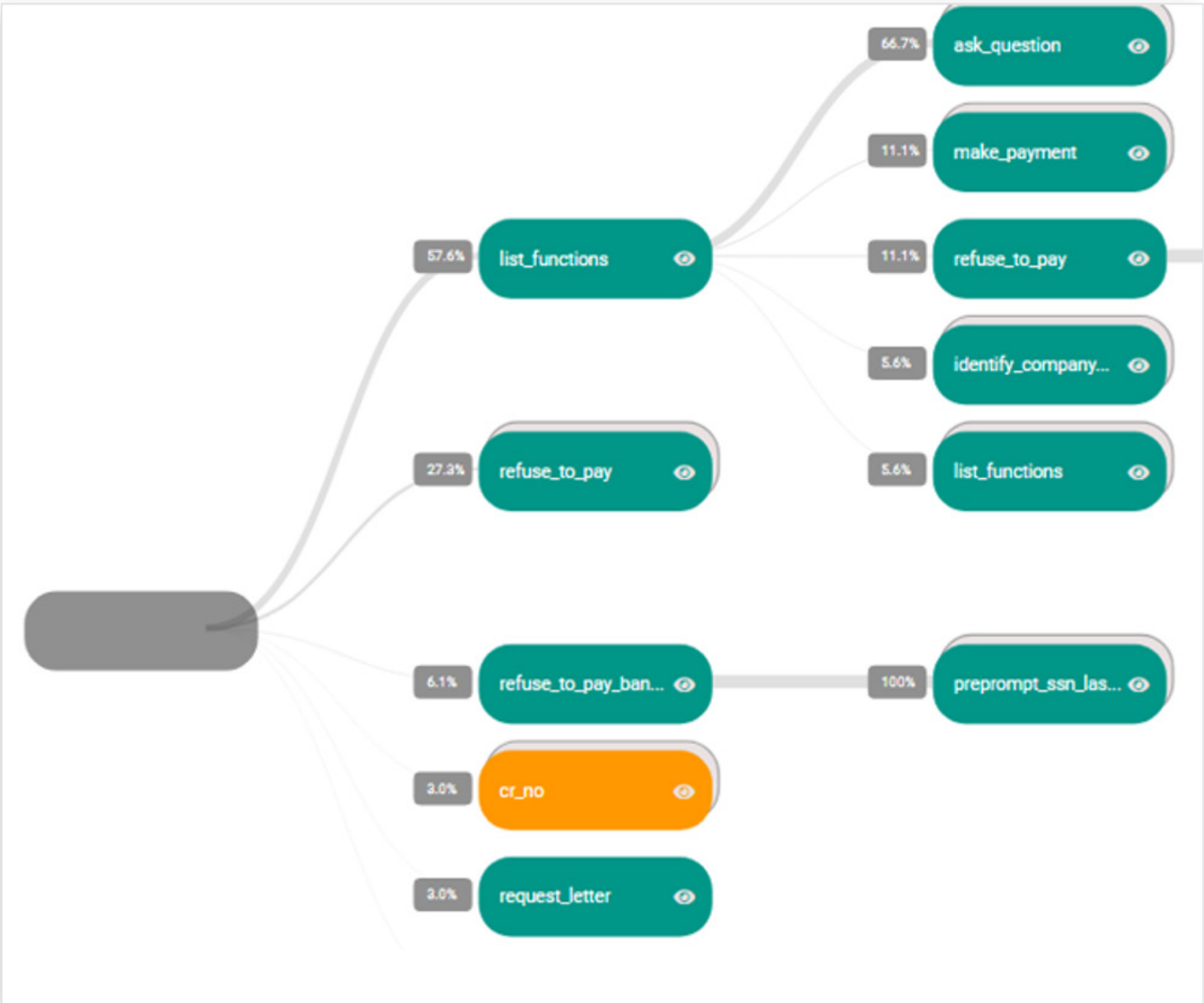
Once the LVP configurations are complete, the Product Consultant will configure the back end of the AI on the Conversational AI Platform to capture the reason for calling.

Active Listening

Once AIVA configuration is complete and the client approves the implementation into production, the Active Listening Phase will begin to capture the reason the caller is calling in. This data is visible in the Conversation AI Platform and will be presented to the client for discussion. The LiveVox Business Consultants will present the data to the client and provide best practices and assist the client to prioritize the conversation flows to build.

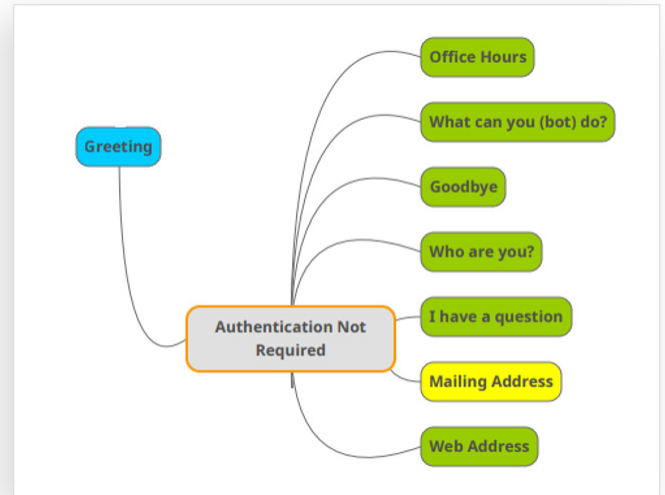
Business Consultant Review

Below is a sample screen shot illustrating the raw intent details available for analytics. The data below shows that fifty seven percent of the callers that called in, asked about “List Functions” and of those fifty-seven percent of callers, sixty six percent of them called in to ask a question. This is the data the business consultant will review with the client.



Create Statement of Work (SOW)

Once a conversation flow is agreed upon for implementation the Product Consulting team will work with the client to create a mind map to map out the flow of the conversation. To the right is a sample print screen of a mind map. The mind map is a conversation flow for when authentication is not required. Under the mind map is the script that will also be reviewed and agreed upon with the client. This output will drive the Statement of Work and cost of the conversation flow. To the right is an example of a Frequently Asked Questions conversation flow with seven Intents.



| Intent | Requires Authentication | Script |
|------------------------|-------------------------|---|
| Office Hours | N | Our office hours are 9 AM to 5 PM Monday through Friday. Is there something I can assist you with today? |
| What can you (bot) do? | N | I can do lots of things! I can help you make a payment, take down your info if you can't or refuse to make a payment, direct you to helpful resources for payoff quotes, answer any questions you may have, or help you speak to the person who can best suit your needs. Is there something I can assist you with today? |
| Goodbye | N | Goodbye |
| Who are you? | N | I am a virtual assistant for ABC Company. I can assist you with things like making payments, taking down your information if you can't or refuse to make a payment, direct you to helpful resources for payoff quotes, or answer any other questions you may have. Is there something I can assist you with today? |
| I have a question | N | Sure, what would you like to know? |
| Mailing Address | N | Certainly, our mailing address is... 1234 Lane Drive, Philadelphia PA 18644. Is there anything else I can assist you with today? |
| Web Address | N | You can check your account and make payments online by visiting us at...www.webaddress.com. |

Phase Two

Phase Two of the AIVA Implementation is the phase that will be repeated multiple times depending upon the number of conversation flows the client would like to implement. With most of the AI Configuration completed during Phase One, Phase Two will concentrate on the implementation of the conversation flows.

Using the Mind Map and script that was created in Phase One, the product consulting team will complete the appropriate configuration steps for the client to perform User Acceptance

Testing (UAT). The PC team will provide a summary of the conversation flows for testing and provide an excel spreadsheet the client may use for tracking issues found during UAT.

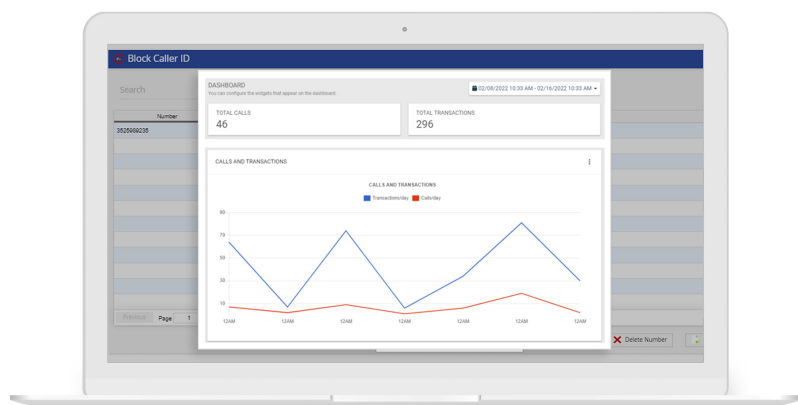
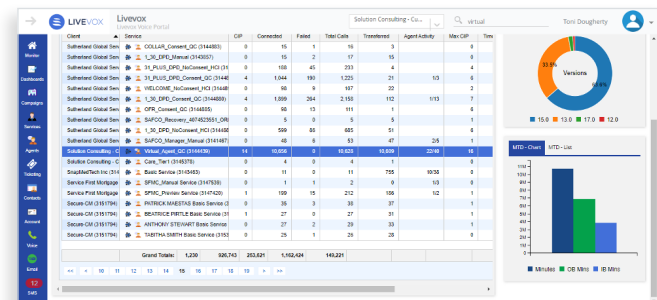
Once the client completes UAT, the team will agree on a plan for rolling the conversation flow out to production. This production plan may include a phased approach for roll out depending on the complexity of the conversation flow.

Reporting/Analytics



LiveVox Portal

The benefit of the AIVA Implementation using virtual agents in the Live Vox Portal is that all reporting and statistical capabilities available for human agents are also available for all virtual agents.



AI Console

The AI Console has a dashboard capability that can be used for additional reporting/statistics. This may require some additional training services as it will involve dbase expertise to build/use the dynamic queries.

Terminology

Intent – A specific action a caller might want to do.

E.g. – Payment Processing – could consist of three Intents – Make Payment, Make Payment – Via Phone, Pay Method – Phone

Mind Map – a visual diagram of the conversation flow. This will include the scripting/verbiage that will be used as a part of the AIVA.

Conversation Flow – Can be one or several intents that will be part of the Phase Two Implementation.

Transaction – Individual exchange during a call flow. Within the interface is a list of AIVA-customer “transaction” (1 round of back-and-forth talk) within the conversation.

Amplify – where you can review your user base journey, interactions, transactions volume and behavior.

Tuning - usually refers to retraining the AI to improve intent recognition. The user simply selects the transactions where the intent was incorrectly matched and adds the caller's utterance to the training set of the model. Retraining is a simple click of a button after that.