KAKAPO
SYSTEMS

KEEP MY PLACE IN QUEUE

End-user Guide

CONTENTS

1 FEATURE DESCRIPTION 1

2 KMPIQ AGENT FUNCTIONALITY 1

2.1 KMPIQ Agent Configuration
2.1.1 Automatic Callback on Assignment
2.1.2 Automatic Closure of KMPIQ Callbacks
2.1.3 Show Assigned Callbacks when not joined to the call center
2.1.4 KMPIQ ACD States
2.1.5 Forced Disposition Codes

3 SUPERVISOR FUNCTIONALITY 13

3.1 Supervisor Configuration

4 PERSONAL WALLBOARD 14

5 REPORTING 15

5.1 KMPIQ – Performance – Agent
5.2 KMPIQ – Performance – Queue

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This document outlines Keep My Place In Queue (KMPIQ) functionality when running Unity Agent, Reception and Supervisor clients, from version 8.6.2. This feature is available to users that are associated to a Call Center either as an Agent or Supervisor, so an understanding of call center functionality (including queued calls, ACD states, DNIS and disposition codes) is assumed.

1 FEATURE DESCRIPTION

Keep My Place in Queue (KMPIQ) is an add-on feature for Unity Agent, Supervisor and Reception that allows queued ACD calls to be held in place in the call center queue when the remote party has released the call, then for the agent to call the party back when their call becomes the next call to be answered.

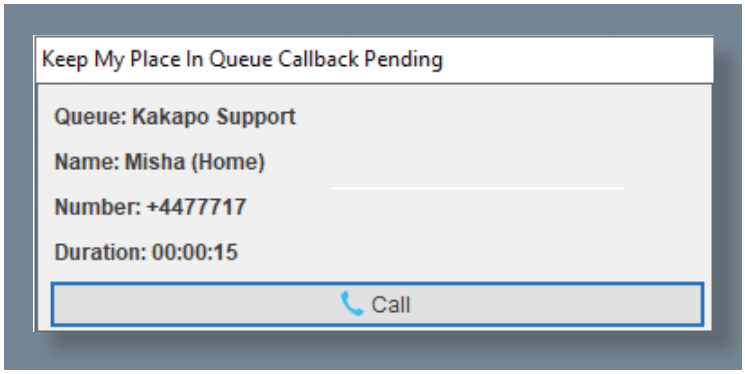
Unity will keep an internal virtual list of queued calls and calls where the caller has requested a callback, referred to as a 'KMPIQ Callback Request'. Every time the agent is ready to accept a new call center call (when they are joined to the call center, not on Do Not Disturb, their ACD state is 'Available' and not already on a call), then Unity will check this virtual list to determine if the next call to be processed is a queued call or a KMPIQ Callback Request.

If the next call to be answered is a normal queued call then it will be passed from the call center to the agent, where it can be answered normally.

If the next call to be answered is a KMPIQ Callback Request then Unity will either prompt the agent to make the outbound call or will make the call automatically, depending on Unity configuration (as outlined below). Before prompting the agent or automatically performing the callback, Unity will change the ACD State to 'Unavailable', thereby ensuring that the next queued call in BroadWorks isn't presented to the agent through the call center.

All Unity clients communicate with each other in order to support different KMPIQ features. Real-time updates are sent between Unity clients as KMPIQ Callback Requests are processed by an agent, so that they are removed from the virtual queue in all other Unity clients. This will ensure a KMPIQ Callback Request isn't processed twice by different agents. It also gives supervisors a complete view of KMPIQ performance.

2 KMPIQ AGENT FUNCTIONALITY



This functionality is available in Unity Agent, Reception and Supervisor, assuming the logged-in user is an agent for one or more call centers that offer KMPIQ callbacks.

When the next call to be processed is a KMPIQ Callback Request, Unity may be configured to show a prompt to the agent, as illustrated below. Unity will perform a contact lookup based on the phone number used to call the call center, which includes all Broadworks directories, Outlook (if configured) and any integrated CRM platforms.

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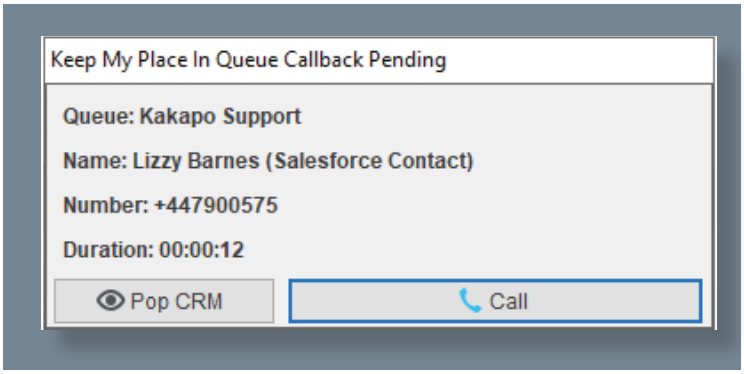


If the contact was found in an integrated CRM platform, the agent will also be able to pop the contact in the CRM platform, which will open as a new tab in the default browser.

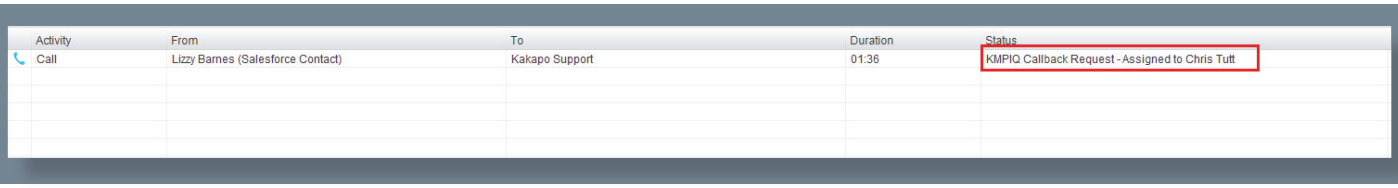
The prompt shows the name of the call center that the KMPIQ Callback Request is for, as well as the caller name (if successfully found) and number. If the call routed through a DNIS that will also be shown with the call center name. The duration shows the time since the callback was requested. For example if a caller calls into a queue and waits for five minutes before requesting a callback, then the duration shown in the prompt will not include that first five minutes.

The KMPIQ callback prompt will be shown on top of all windows and applications, so although applications (including Unity) can be activated and used, the prompt will continue to be shown until the KMPIQ Callback has been made, either by this agent or another agent, or if the agent is no longer available to process call center calls either through ACD state, joined state, or hook-state. If multiple agents are prompted to perform the same KMPIQ callback, the first agent to click the Call button will be assigned the callback [and make the outbound call] and it will be removed from the virtual queue for other agents, including closing the prompt. Those Unity clients will then look for the next call to be processed, which may be a KMPIQ Callback Request or a normal queued call.

Unity may also change the ACD state of the agent to 'Unavailable' to ensure queued call center calls aren't routed to the agent. This is configured in Unity Settings (as outlined below) and is strongly recommended as it ensures queued calls won't be presented to the agent while they are processing a KMPIQ Callback. Unity will check for the next call in the virtual queue even when the ACD state is set to this ACD state, if the next call to be processed is a normal queued call Unity will automatically change the ACD state to 'Available' so that the call can be routed to the agent.

Once the user presses the Call button the KMPIQ Callback Request will be assigned to that agent and Unity will perform the callback. It will be removed from the virtual queue for all other Unity clients. If Unity is configured not to show the prompt this will occur immediately rather than the prompt being displayed.

When the callback has been assigned to the agent it will appear in the Activity list, as shown below.



You can see that the call is showing as an inbound call, in that the 'From' party is the caller who called into the call center, while the 'To' party is the call center. If the call was received through a DNIS that isn't the primary DNIS for the call center then this will also be shown in the 'To' column.

The duration is the amount of time that has passed since the caller requested a callback (by escaping) while in the call center queue.

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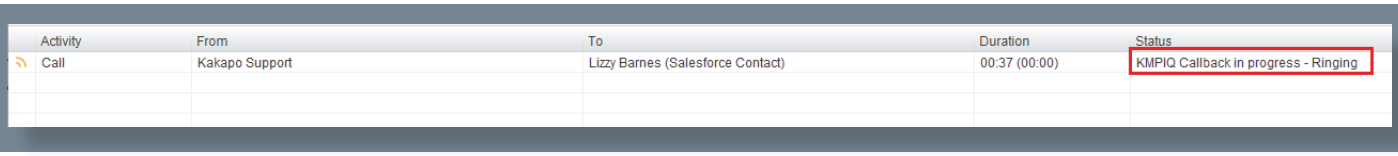
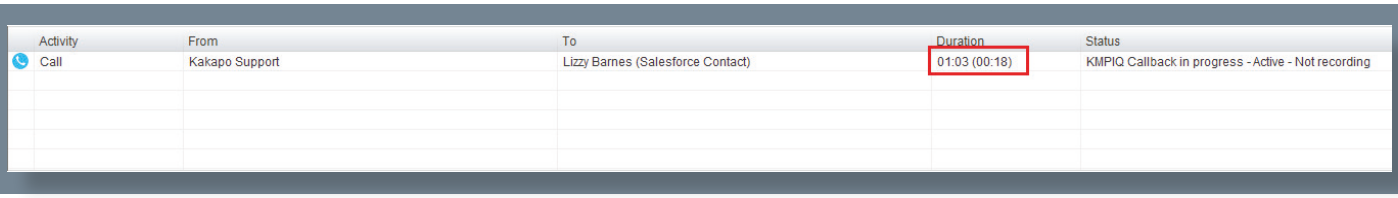
When the callback is in progress the display below will change so that the call shows as an outbound call, the status will also be updated to show the callback is in progress including the state of the call. Please note that the call will immediately update to the below when it is first reserved by an agent, either after the prompt has been accepted or automatically when the agent is available, depending on Unity Settings (outlined below).

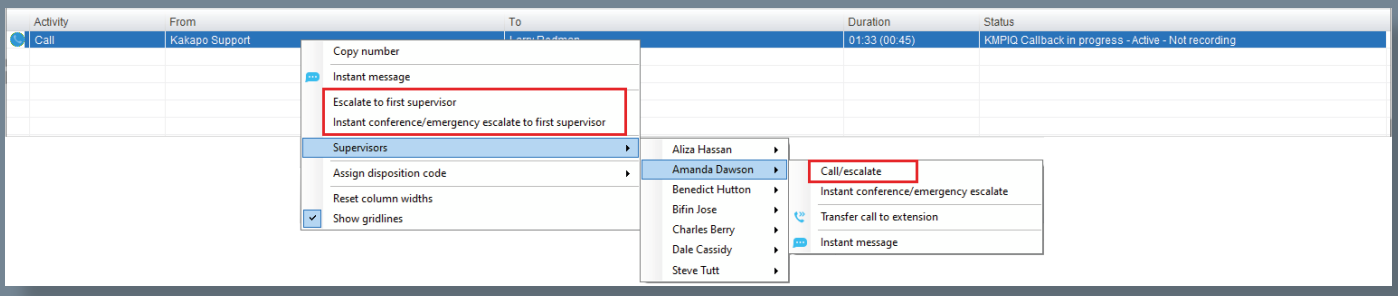


The duration column will continue to show the duration since the original call was escaped from the call center queue, but also the duration of the current callback – this will only start incrementing once the call becomes active.

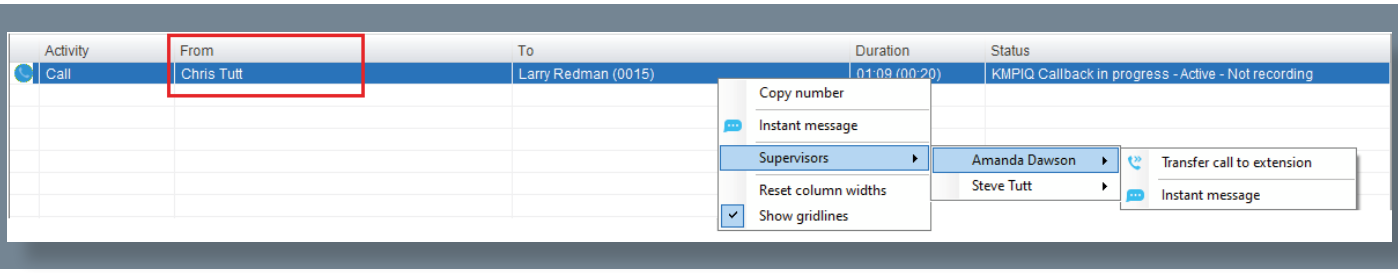


The call can now be controlled the same as any other call in Unity, including assigning a disposition code or account code or performing all call control actions (for example hold, retrieve, blind and announced transfer).

If the initial queued call was made to a DNIS that supports outbound dialing, then when the KMPIQ Callback is made, Unity will first configure Broadworks so that the call is made from the outbound DNIS rather than the agent's CLI. In this case it is an ACD call in BroadWorks, which means additional features are supported such as escalation to supervisors.



If an outbound DNIS is not used to make the callback then escalation is not available, but the call can still be blind transferred to a supervisor. The below screenshot shows a KMPIQ callback that doesn't use an outbound DNIS, Unity will show that the call is being made from the agent rather than the call center.



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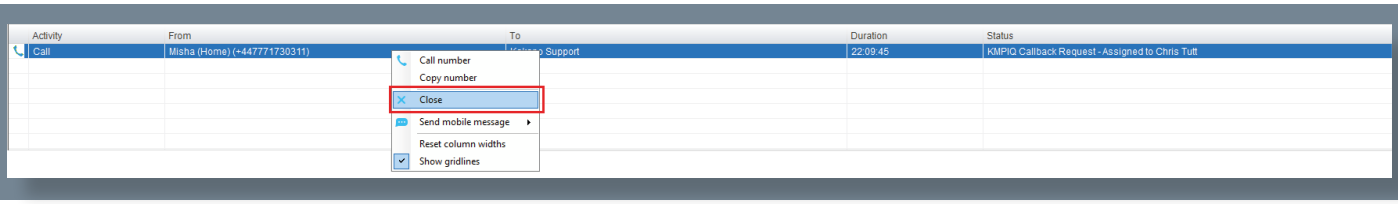
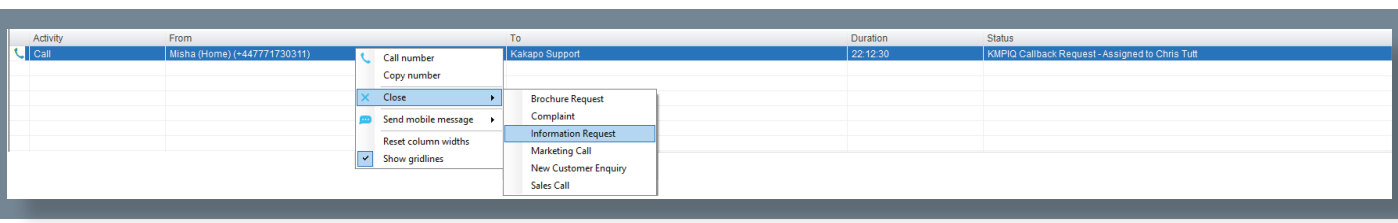
Please note that if the KMPIQ Callback Request needs to be made through an outbound DNIS, then there may be a short delay when performing the callback. This is because Unity must request that BroadWorks use the outbound DNIS for this agent and wait for the response. Unity won't dial the customer until a successful response is received. As soon as the callback is alerting (ringing) Unity will clear the outbound DNIS for the agent, if a previous outbound DNIS was in use this will also be cleared.

When the outbound call is released it may be automatically closed, if configured in Unity settings. When a KMPIQ callback is closed it is removed from the display of the assigned agent and any supervisors that have been configured to include assigned KMPIQ Callbacks, as outlined in section 3. Although the remote party can be re-dialed (for example through the Call Logs tab), this will not be recorded as part of the KMPIQ Callback, including if disposition codes are assigned.

Regardless of whether auto-close is activated or not, Unity will not close the KMPIQ callback request if the outbound call was not answered. The assumption is that the agent will attempt to contact the customer again. However an assigned KMPIQ Callback can be always be manually closed.

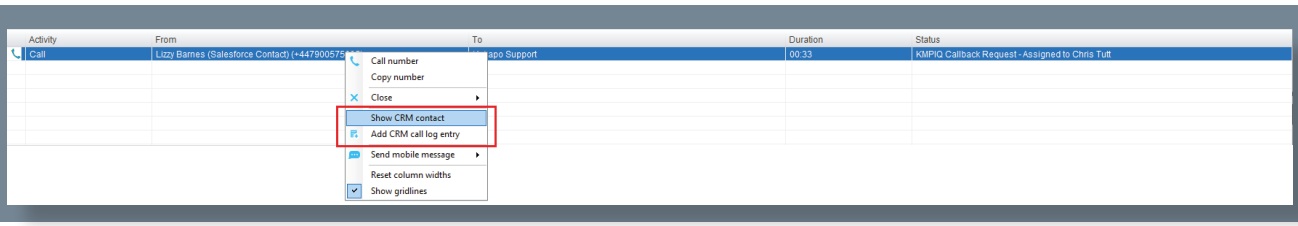


If Unity is forcing disposition codes to be assigned to call center calls then one must be assigned when closing the KMPIQ Callback, if not already assigned.



If a KMPIQ Callback has not been closed then any additional callbacks can be initiated either by double-clicking the entry in the Current Calls list, or by right-clicking and selecting Call Number.

If a CRM contact was matched to the KMPIQ Callback then additional options are available when right-clicking the KMPIQ Callback request.



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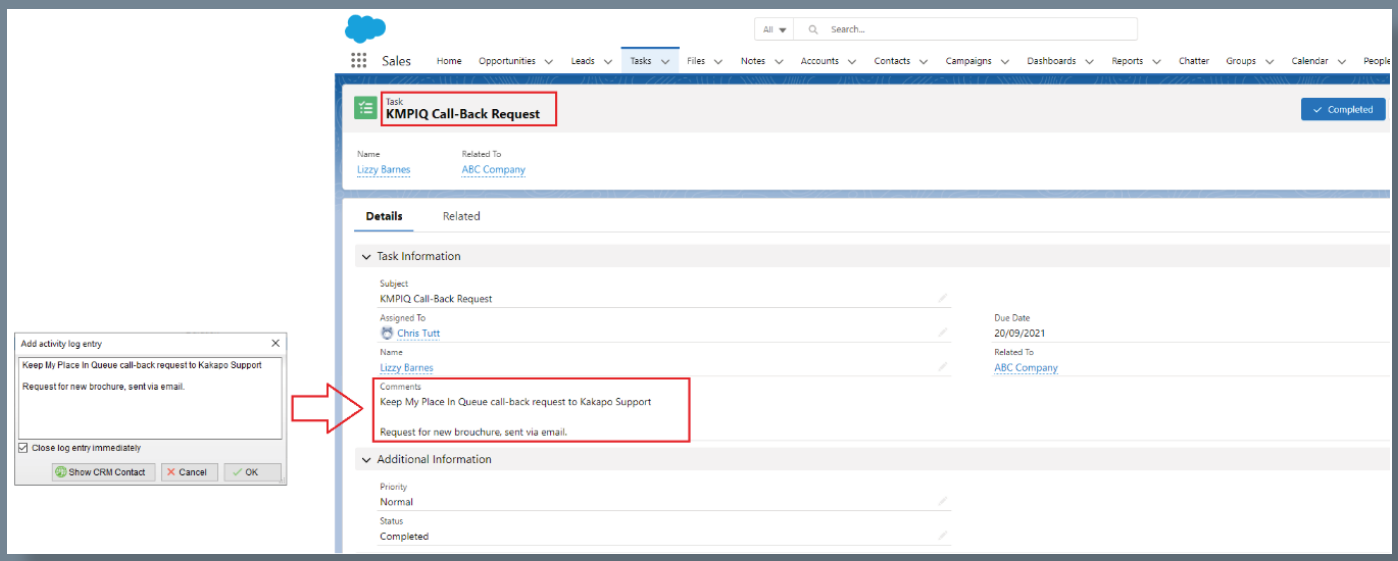
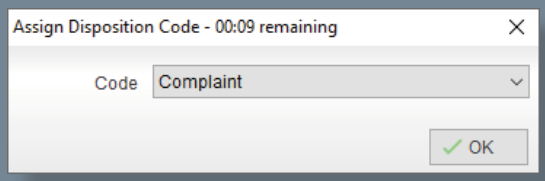
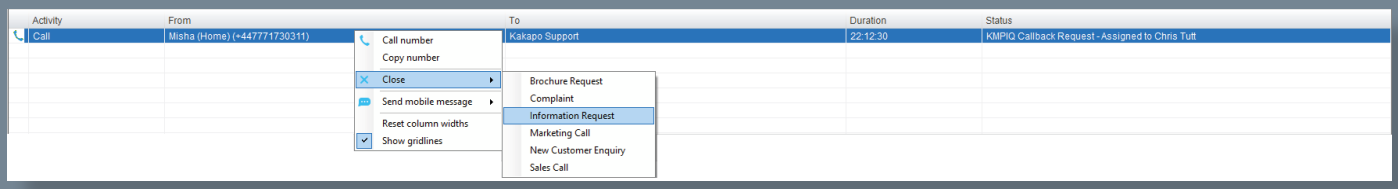
The user can open the record for the CRM contact in a new tab in the default browser, or add a call log entry which will be logged against that CRM contact.





If Unity is forcing agents to assign a disposition code to a call center call, this will also apply to KMPIQ Callback Requests. In this case when the KMPIQ callback ends and Unity is configured to auto-close then the agent will be prompted to assign a disposition code.

Please note this only applies if the callback was answered and Unity is configured to automatically close KMPIQ callbacks. Otherwise the disposition code must be assigned when closing the callback.



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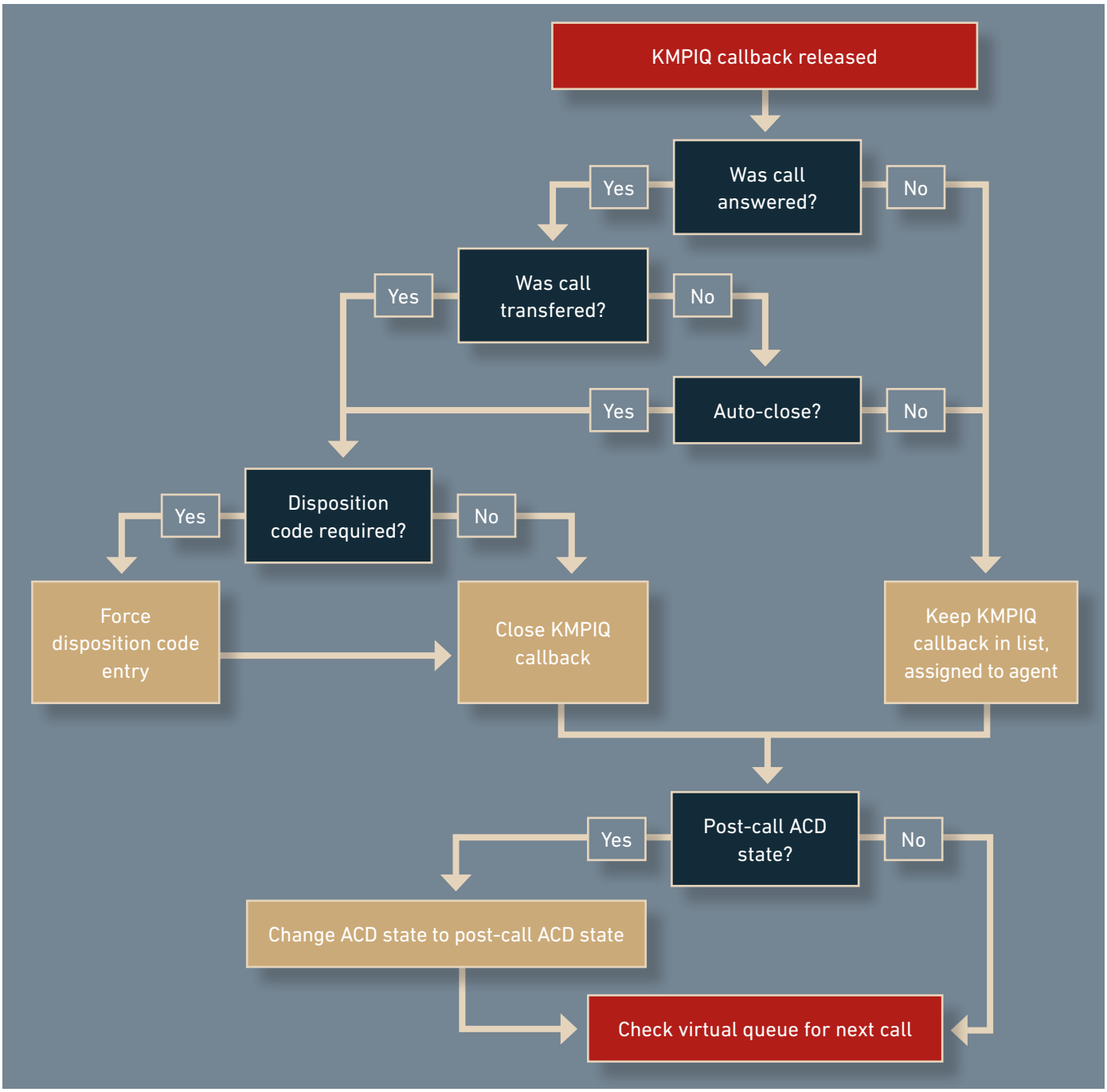
Whenever a KMPIQ callback is released, the below logic is used to perform any post-call actions and check the virtual queue for the next call.



Unity will check the virtual queue when any of the below events occur:

- The agent joins a call center.
- The ACD state is changed.
- A call is released.
- Do Not Disturb is deactivated.

Therefore It is imperative that no other client or device can automatically change the ACD state, otherwise a loop will be created whereby Unity and the other client or device are continually changing the ACD state. It is therefore strongly recommended that call center

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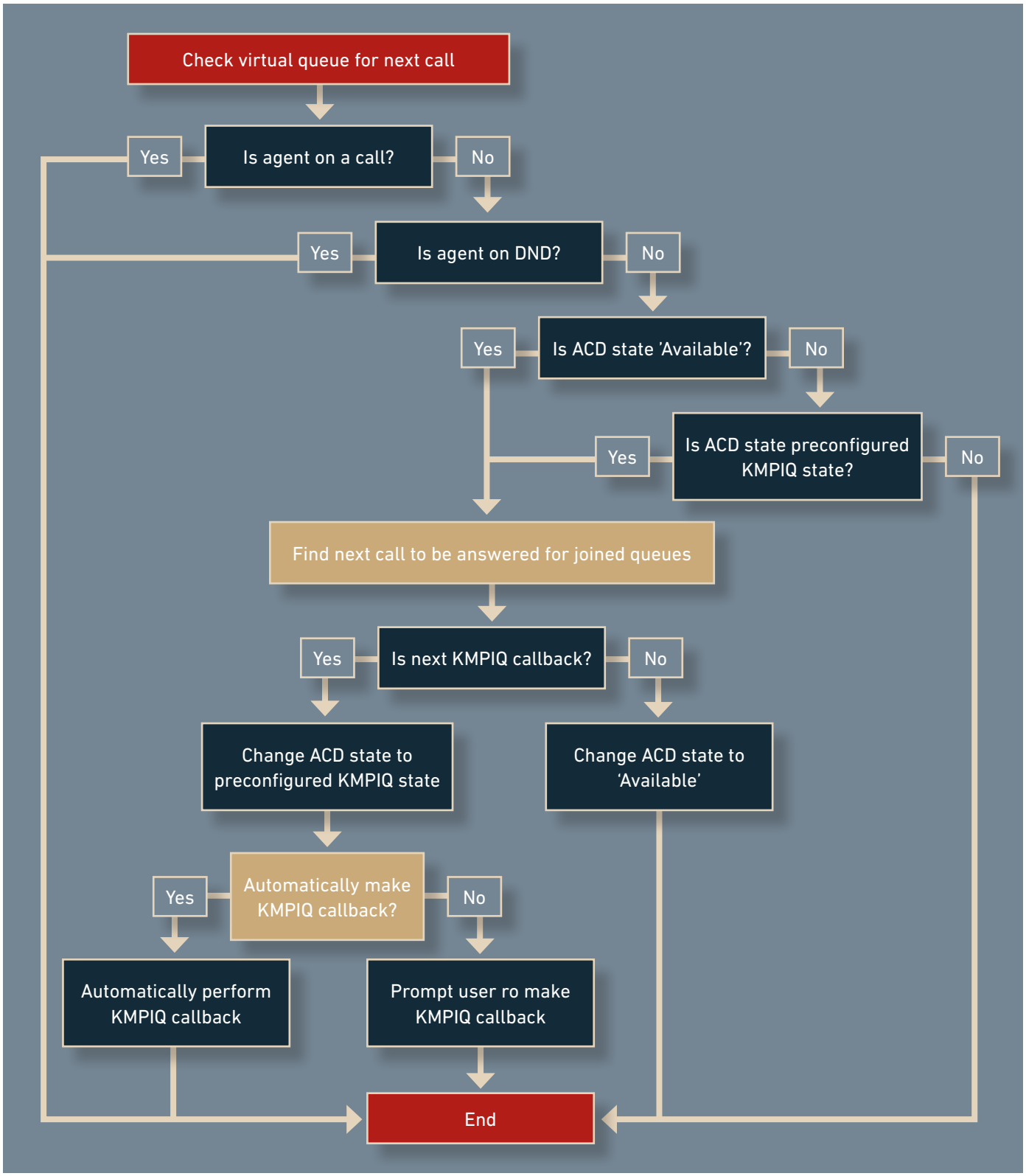
functionality is removed from any hard phones that are used by agents that perform KMPIQ callbacks, because these devices will often change the ACD state to Available only for Unity to change it to Unavailable (because the next call to be processed is a KMPIQ callback), then for the device to change it back to Available and for this to continue in an endless loop.

The below logic outlines this process:



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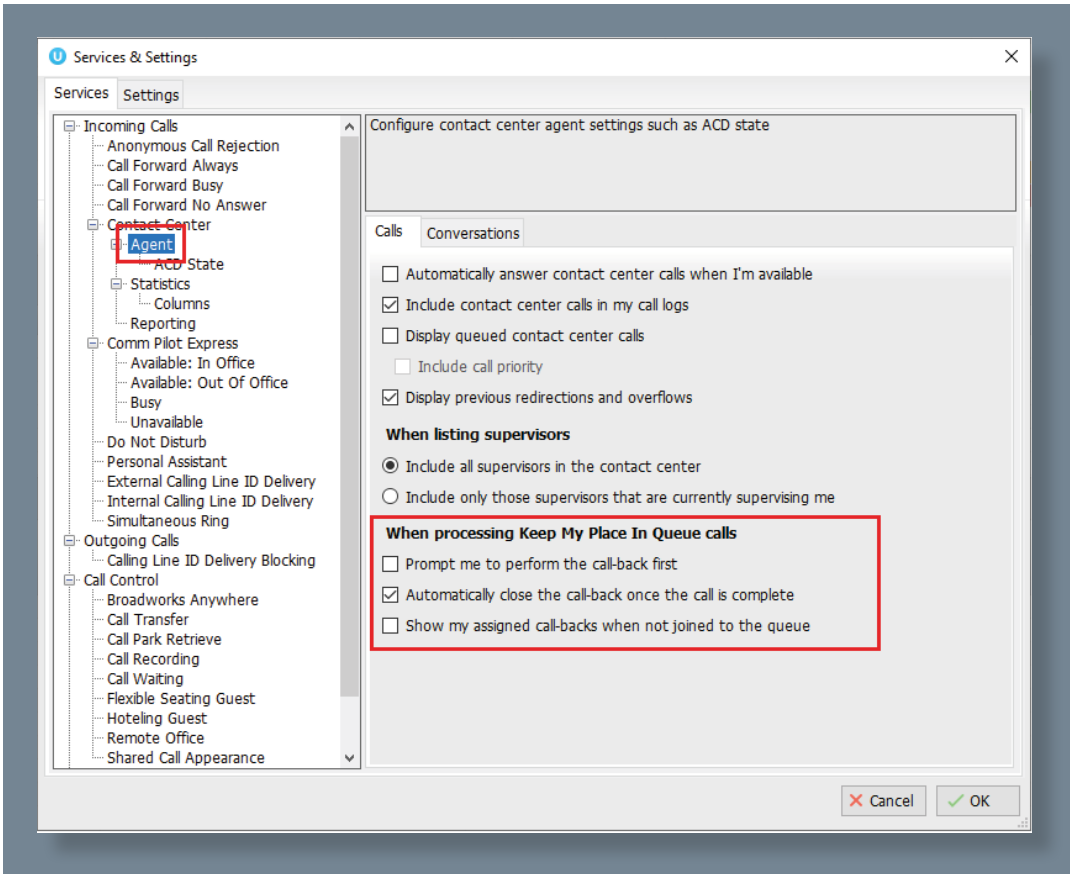
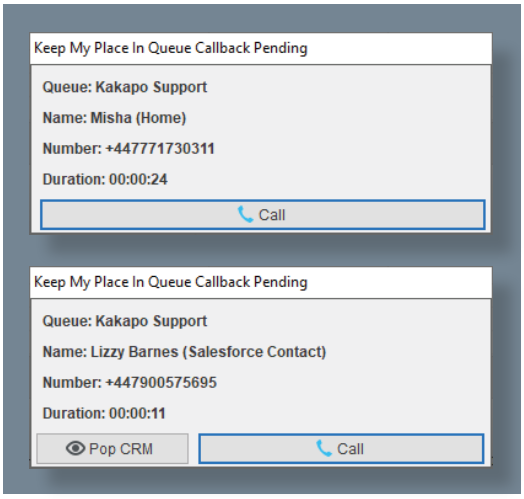
2.1 KMPIQ AGENT CONFIGURATION

The KMPIQ feature can be configured as illustrated below, these settings can be preconfigured through User Templates which are further outlined in this document. The default KMPIQ settings are shown here.



2.1.1 Automatic Callback on Assignment

If the 'Prompt me to perform the callback first' setting is activated then when the next call to be answered is a KMPIQ Callback request, Unity will change the ACD state to Unavailable and show a prompt to the user, as shown below. This window will be shown on top of all windows and applications, so although other applications (and Unity) can be used, the prompt will always be shown.



The callback is not assigned to the agent until they click the Call button. If another agent is being prompted to perform the same callback and they are first to click Call, then this agent's Unity will look for the next call in the virtual queue and either show a new prompt for the next KMPIQ Callback, or set the ACD state to Available so the next queued call center call can be routed to them.

If this setting is not checked then Unity will still change the ACD state, but rather than prompting the agent the KMPIQ callback will automatically be assigned and the callback will be initiated immediately.

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2.1.2 Automatic Closure of KMPIQ Callbacks

If the 'Automatically close the callback once the call is complete' setting is checked then once the call has been released Unity will close the callback request and it will be removed from the agent's activity list, as well as the lists of any supervisor clients showing the callback. Once a KMPIQ callback has been closed no additional disposition codes can be assigned.

Please Note: If the callback was not answered then Unity will not automatically close the KMPIQ callback, as it is assumed the agent will want to try to perform the callback at a later time.

If the outbound call was transferred to another party (either using blind or announced transfer) then it is assumed that the callback is complete so it will be closed, even if Unity is not configured to automatically close KMPIQ callbacks. The assumption is that if the callback has been answered and transferred then it is no longer current/active.

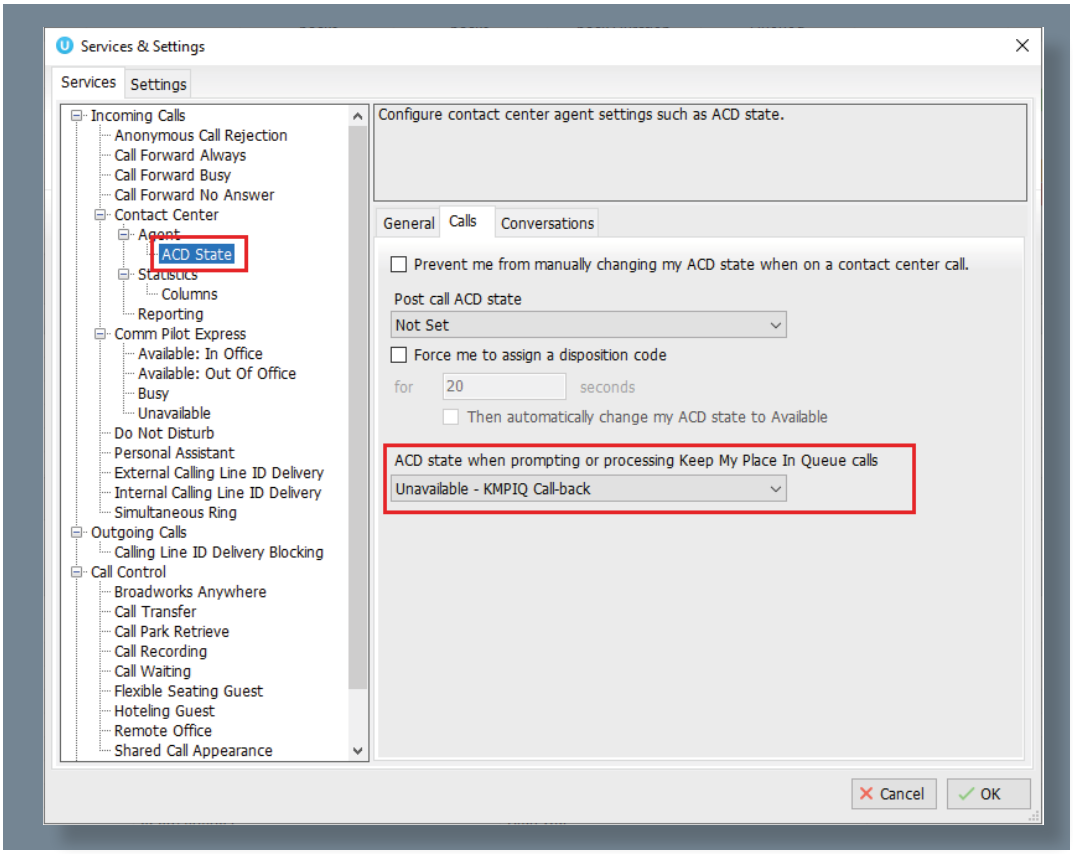
2.1.3 Show Assigned Callbacks when not joined to the call center

Unity can be configured so that any open/assigned KMPIQ callbacks can be managed even when the agent is not joined to the call center. Any callbacks will still be made through the outbound DNIS (if applicable) but the agent will not receive any new KMPIQ callbacks or queued calls for that call center. This is a useful tool to ensure an agent can close all KMPIQ callbacks at the end of their shift without being alerted of any new calls.

Assigned KMPIQ Callback Requests are stored in the Kakapo cloud, meaning if an agent is unable to close a callback when their shift ends, they will be able to continue processing the callback in their next Unity session.

2.1.4 KMPIQ ACD States

As previously mentioned, when Unity is prompting the agent to perform a KMPIQ callback or automatically makes the outbound call, it's important that their ACD state is set to Unavailable, thereby ensuring that no queued calls are routed to the agent. This is configured as shown below.



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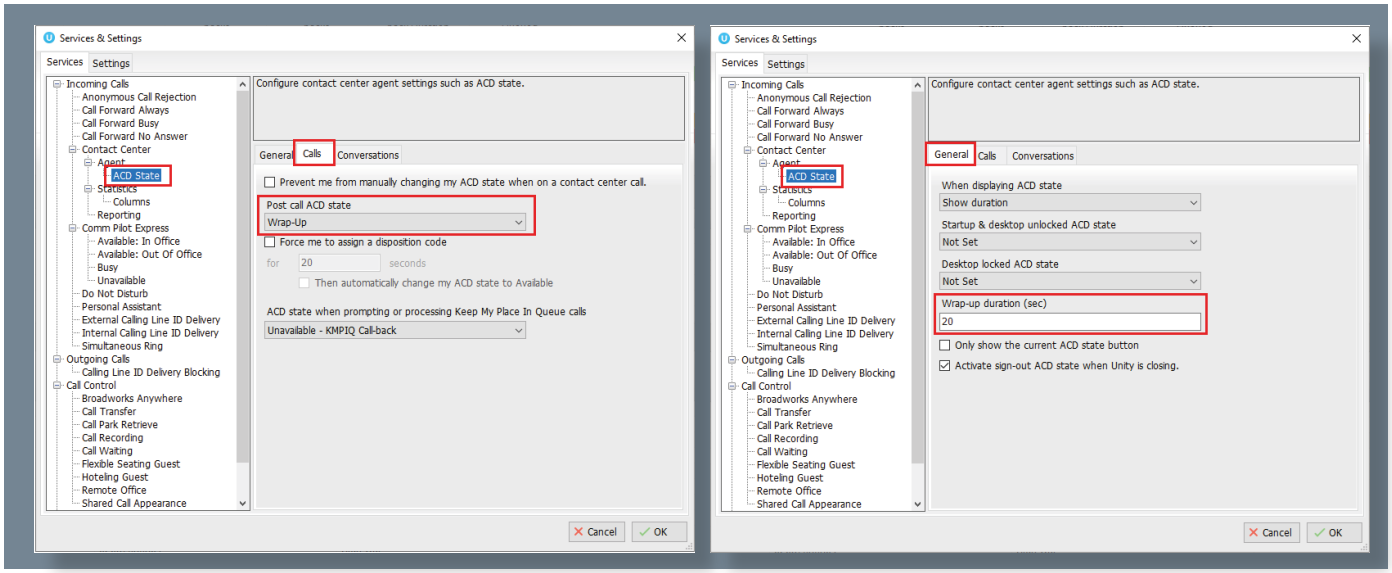
Only Unavailable ACD states can be selected from the above drop-down. Unity will automatically change the agent's ACD state to that set when prompting the agent or automatically making the KMPIQ callback.

It is strongly recommended that a separate Unavailable reason code is created for this specific purpose. Unity will continue to prompt the agent to perform the callback while their ACD state is Available or the ACD state selected here, effectively meaning this ACD state will be similar in use to the 'Available' ACD state. As shown in the above flow diagram, if the agent is in this ACD state and the next call is a queued call then Unity will change the ACD state to 'Available' in order for the next queued call to be routed. Therefore if this ACD state is also used for another purpose (for example 'Unavailable – Lunch') the agent will be prompted to perform a callback [or a queued call will be routed] when they shouldn't be.

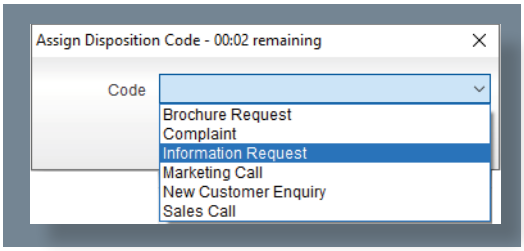
The agent's ACD state will not be changed while the callback is in progress, but once released the normal post-call ACD state will be used. If the post-call ACD state is set to 'Wrap-Up' a Wrap-Up timer may be used to automatically change the agent's ACD state to Available, as is the case with inbound call center calls.



Broadworks/call logger reports will provide information on the total duration that the agent spent in this ACD state, which can be combined with the number of KMPIQ callbacks made to indicate agent efficiency.

2.1.5 Forced Disposition Codes

The KMPIQ feature works seamlessly with the feature to force the agent to enter a disposition code for all call center calls. If forced disposition codes are enabled and KMPIQ callbacks are configured to be automatically closed [or are transferred] then Unity will prompt the agent to enter a disposition code when the call ends, similar to when releasing an inbound call center call.



If KMPIQ callbacks are not automatically closed then when manually closing the KMPIQ callback, Unity will force the agent to assign a disposition code if one hasn't already been assigned.

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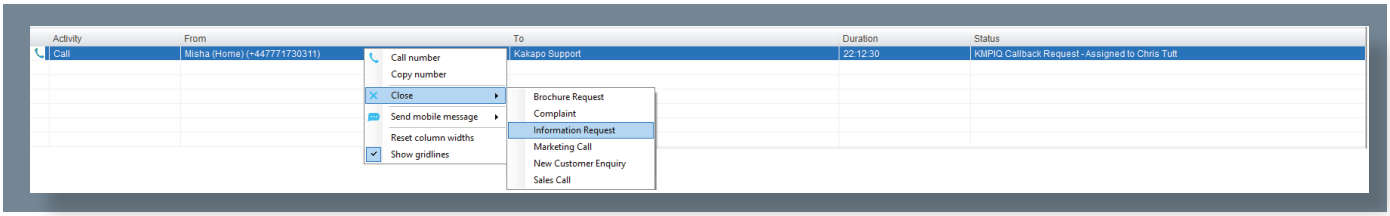
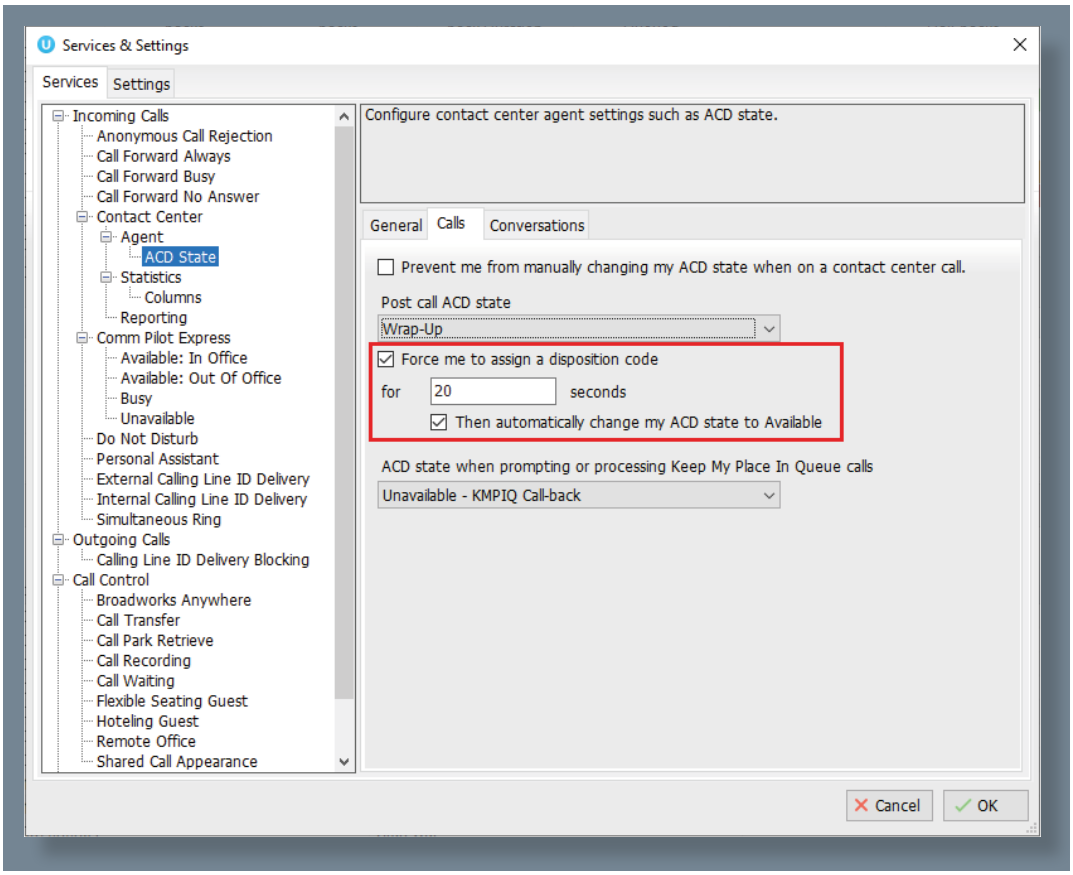


When assigning a disposition code to an active callback it will also be recorded in BroadWorks. If the callback is no longer in place when a disposition code is assigned then it will be recorded in Broadworks if the KMPIQ callback was the last ACD call for the agent. In all cases it will be assigned to the KMPIQ callback in the Unity cloud.

Please Note: If multiple callbacks are performed for the same KMPIQ Callback Request and disposition codes are assigned during each call, they will be assigned to different calls in BroadWorks and any call logging platforms being used. This is because they are separate calls in BroadWorks. However they will be recorded against the same KMPIQ Callback Request in Unity and will be shown for the same call in the KMPIQ reports (as outlined below), this is the case even if the KMPIQ Callback Request was processed over several Unity sessions or days.

If the callback was not made through an outbound DNIS then if a disposition code is assigned it will not be recorded in Broadworks, because the call is not treated as an ACD call. However it will be associated to the KMPIQ Callback Request in Unity and will be shown in the KMPIQ reports (as outlined below).

When forcing the agent to assign a disposition code, the post-call ACD state will only be set once the disposition code prompt has been closed [either because the agent has assigned a code or the alert duration has elapsed] and Unity isn't configured to change the ACD state to Available.



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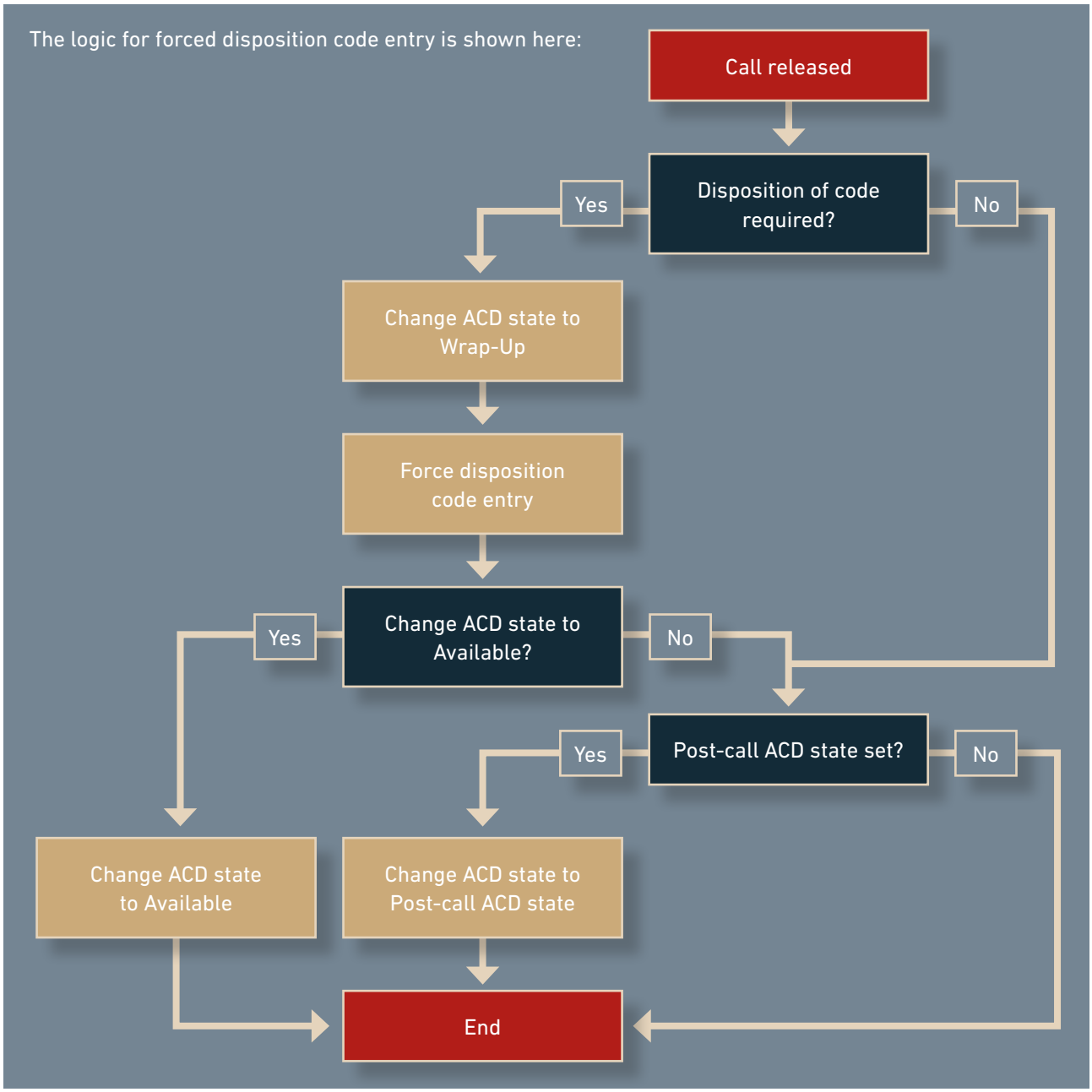
The logic for forced disposition code entry is shown here:



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3 SUPERVISOR FUNCTIONALITY

Unlike agents, supervisors are able to see any unassigned KMPIQ callbacks, as well as those currently open and assigned to an agent.

Activity	From	To	Duration	Status
Call	Larry Redman (0015)	Kakapo Support	02:26	KMPIQ Callback Request - Assigned to Charles Berry
Call	Lizzy Barnes (Salesforce Contact) (+447900575695)	Kakapo Support	01:19	KMPIQ Callback Request - Queued at position 1 - highest priority
Call	Amanda Dawson (0006)	Kakapo Support	00:22	Queued at position 2 - highest priority

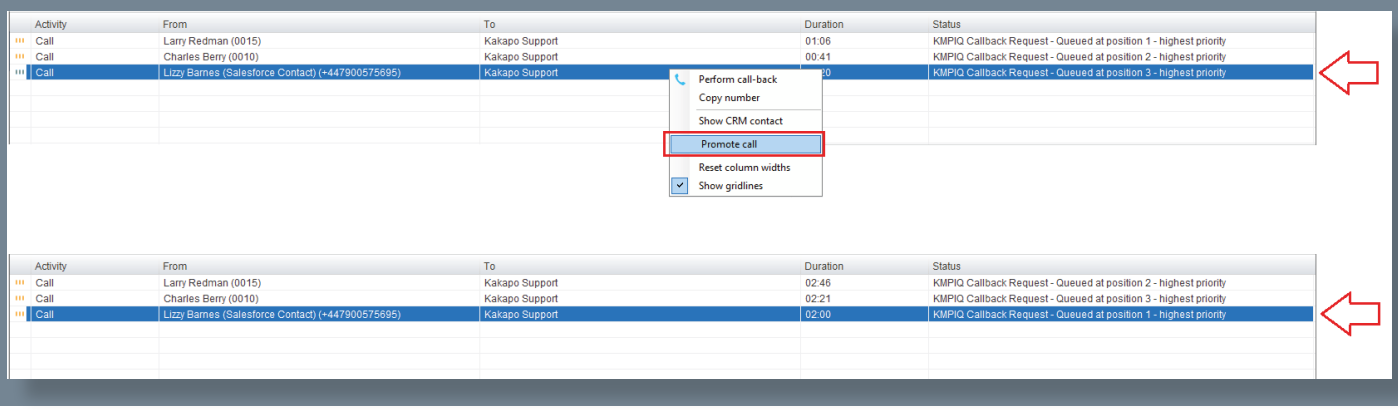
The above illustration shows three calls, the first is a KMPIQ Callback Request that has been assigned to an agent. The supervisor can see the duration since the callback was requested. The second call is an unassigned KMPIQ callback request, the supervisor can see that this is the next call to be processed. The third call is a queued call to the call center where the remote party is waiting on the phone. Unity shows this call as queued at position two, even though it's actually queued at position one in BroadWorks. Queue position is calculated by Unity based on call priority and entry time into the queue, or time that the call was promoted by a supervisor (outlined below).

As KMPIQ callbacks are assigned to agents they will no longer be considered queued, so the queue position will be updated for any unassigned KMPIQ callbacks and any normal queuing calls.

The supervisor can also see when an assigned KMPIQ callback is in progress, as shown below.

Activity	From	To	Duration	Status
Call	Kakapo Support	Larry Redman (0015)	00:16	KMPIQ Callback Request - Assigned to Charles Berry (Callback in progress)

The supervisor can promote queued calls before they are escaped, as well as KMPIQ Callback Requests. If an agent is being prompted to perform a KMPIQ callback and the supervisor promotes another KMPIQ callback then the agent's KMPIQ prompt will immediately be updated with the newly promoted callback.



KMPIQ Callback Requests cannot be closed by a supervisor or transferred to an agent. This feature works on a first-in/first-out queuing policy that cannot be overridden.

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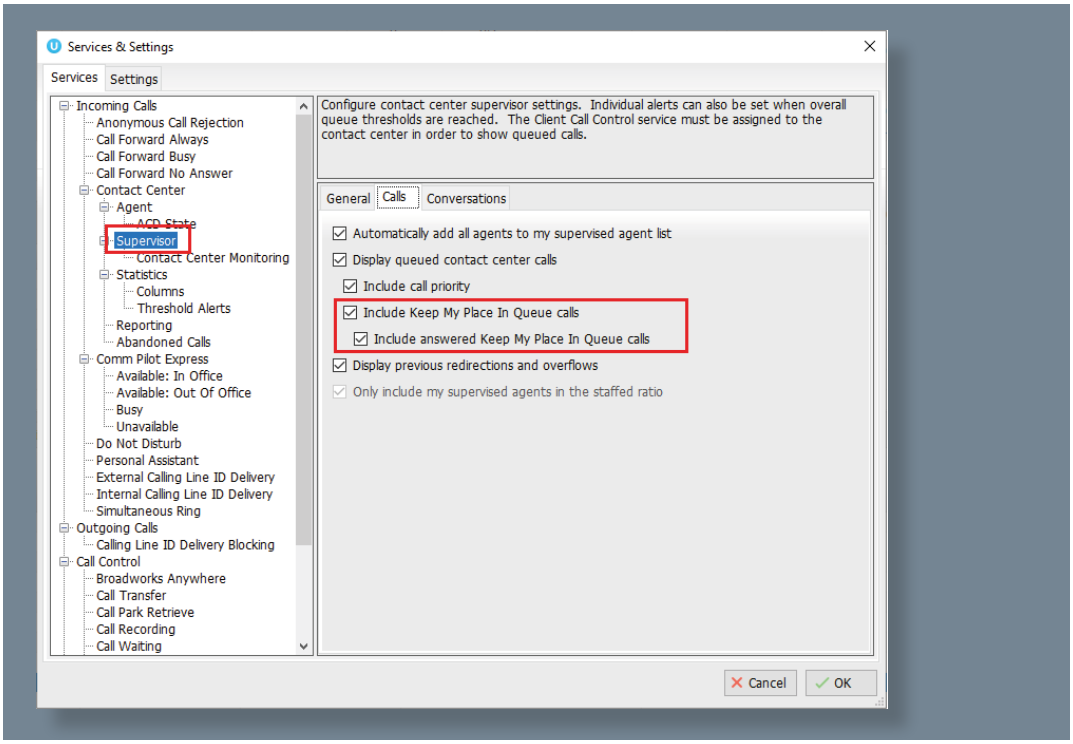
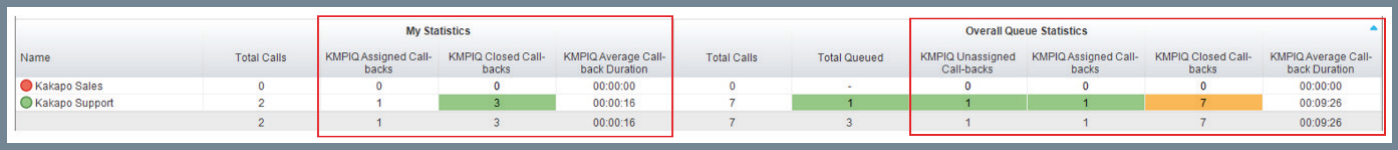
3.1 SUPERVISOR CONFIGURATION

The below settings determine if KMPIQ Callback Requests are shown in the Activity list. If shown then supervisor functionality such as call promotion and visibility of active callbacks is available by default.

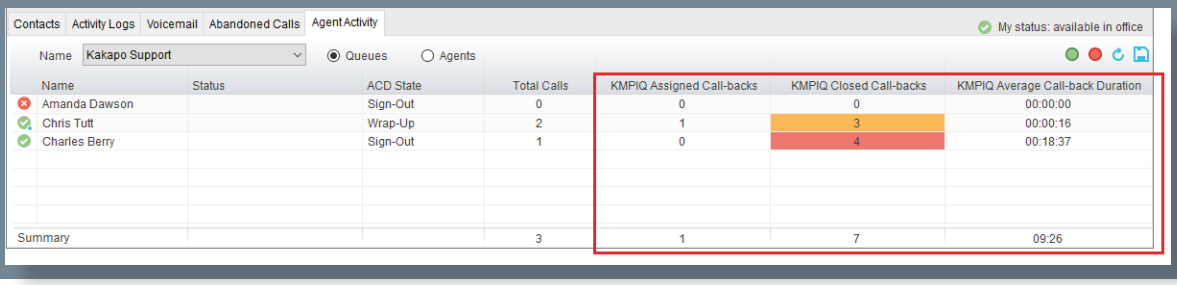


4 PERSONAL WALLBOARD

All Unity clients offer KMPIQ statistics in the Personal Wallboard, that are updated in real-time. These statistics are available for personal metrics, overall call center metrics or through the Agent Activity tab in Unity Supervisor. As is the case with all statistics, threshold values can be used to easily indicate key performance milestones or alerts.



Name	My Statistics: Total Calls	My Statistics: KMPIQ Assigned Call-backs	My Statistics: KMPIQ Closed Call-backs	My Statistics: KMPIQ Average Call-back Duration	Overall Queue Statistics: Total Calls	Overall Queue Statistics: Total Queued	Overall Queue Statistics: KMPIQ Unassigned Call-backs	Overall Queue Statistics: KMPIQ Assigned Call-backs	Overall Queue Statistics: KMPIQ Closed Call-backs	Overall Queue Statistics: KMPIQ Average Call-back Duration
Kakapo Sales	0	0	0	00:00:00	0	-	0	0	0	00:00:00
Kakapo Support	2	1	3	00:00:16	7	1	1	1	7	00:09:26
	2	1	3	00:00:16	7	3	1	1	7	00:09:26



Name	Status	ACD State	Total Calls	KMPIQ Assigned Call-backs	KMPIQ Closed Call-backs	KMPIQ Average Call-back Duration
Amanda Dawson		Sign-Out	0	0	0	00:00:00
Chris Tutt		Wrap-Up	2	1	3	00:00:16
Charles Berry		Sign-Out	1	0	4	00:18:37
Summary			3	1	7	09:26

Please Note: The 'Abandoned Calls' statistic in the Personal Wallboard will be incremented as queued calls are escaped. This is because BroadWorks treats these calls as abandoned calls, it is outside the control of Unity.

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5 REPORTING

The below KMPIQ reports are available in Unity Supervisor only, they can be generated through the Report window and are available as PDF or CSV file.

5.1 KMPIQ – PERFORMANCE – AGENT

This report will show all KMPIQ Callback Requests for one or more selected agents. The Wait Duration column shows the amount of time between the KMPIQ callback being requested and the time that the first callback was placed.

Click here to pop contact in CRM

Queue	Caller Name	Caller Number	Escaped Date Time	Wait Duration	Closed Duration	Disposition Codes
Charles Berry						
Kakapo Support	Lizzy Barnes (Salesforce Contact) (+447900575)	+447900575	10/10/2021 11:51:05	00:23:42	00:24:06	Marketing Call
Kakapo Support	Larry Redman (0015)	0015	10/10/2021 11:50:15	00:25:07	00:25:20	Marketing Call
Kakapo Support	Charles Berry (0010)	0010	10/10/2021 11:50:40	00:25:35	00:25:43	Complaint
Kakapo Support	Larry Redman	0015	10/10/2021 12:16:35	00:00:08	00:00:26	Marketing Call
Charles Berry: 4 Call-backs				00:18:38	00:18:53	
Chris Tutt						
Kakapo Support	Larry Redman	0015	10/10/2021 07:36:53	00:00:38	00:05:17	Marketing Call
Kakapo Support	Larry Redman	0015	10/10/2021 07:43:56	00:00:08	00:09:00	
Kakapo Support	Larry Redman	0015	10/10/2021 11:19:27	00:00:06	00:13:54	Marketing Call
Kakapo Support	Larry Redman (0015)	0015	10/10/2021 12:35:03	00:00:12	00:33:01	Marketing Call Brochure Request Information Request
Chris Tutt: 4 Call-backs				00:00:16	00:15:18	
Steve Tutt						
Kakapo Support	Larry Redman	0015	08/10/2021 12:10:46	00:00:12	01:05:02	Marketing Call
Steve Tutt: 1 Call-backs				00:00:12	01:05:02	

Multiple disposition codes assigned

5.2 KMPIQ – PERFORMANCE – QUEUE

This report shows similar information, but it is grouped by the call center(s) selected, each record includes the agent that performed the KMPIQ callback.

Agent Name	Caller Name	Caller Number	Escaped Date Time	Wait Duration	Closed Duration	Disposition Codes
Kakapo Support						
Chris Tutt	Larry Redman	0015	10/10/2021 07:36:53	00:00:38	00:05:17	Marketing Call
Chris Tutt	Larry Redman	0015	10/10/2021 07:43:56	00:00:08	00:09:00	
Chris Tutt	Larry Redman	0015	10/10/2021 11:19:27	00:00:06	00:13:54	Marketing Call
Charles Berry	Lizzy Barnes (Salesforce Contact) (+447900575)	+447900575	10/10/2021 11:51:05	00:23:42	00:24:06	Marketing Call
Charles Berry	Larry Redman (0015)	0015	10/10/2021 11:50:15	00:25:07	00:25:20	Marketing Call
Charles Berry	Charles Berry (0010)	0010	10/10/2021 11:50:40	00:25:35	00:25:43	Complaint
Charles Berry	Larry Redman	0015	10/10/2021 12:16:35	00:00:08	00:00:26	Marketing Call
Chris Tutt	Larry Redman (0015)	0015	10/10/2021 12:35:03	00:00:12	00:33:01	Marketing Call Brochure Request Information Request
Kakapo Support: 8 Call-backs				00:09:27	00:17:05	
Total: 8 Call-backs				**00:09:27**	**00:17:05**	

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