

## Jacada Advisor

Improve CSR knowledge and productivity, reduce training expenses, and process-enable your call center

For customer service organizations across the globe, delivering on the customer experience promise is a make-or-break scenario. Yet while companies strive to market innovative products, they often fall short when it comes to providing their customer service personnel — those directly on the customer service front lines — with the systems and tools necessary to drive optimum customer satisfaction.

Even in the best of times, IT budgets don't always allow for system replacement or significant unified desktop upgrade projects. Customer service representatives (CSRs) are left to struggle with complex applications and legacy systems in order to service their customers. For call center management, training and agent retention are as much at issue as is customer satisfaction.

### Increase Effectiveness with Streamlined Training

Jacada® Advisor is a technology-enablement solution aimed at those customer service organizations that do not wish to undertake a complete unified desktop project, but still need to improve the usability and user efficiency of key applications. Jacada Advisor provides these call centers with a proven solution that allows them to utilize a dynamic, rules-driven process to improve the customer experience using non-invasive, lightweight integration methods.

Training is a key factor for call center operations, both in terms of cost and effectiveness. The desktop automation capabilities of Jacada Advisor, along with in-context help and embedded interaction management, can have a significant impact on the training cycle for new employees in the call center environment. Jacada Advisor improves customer service training in these additional ways:

- **Flexibility with Training Budget** — reducing the need for system training means a reduction in the overall operational budget and/or more time available for specific industry- or customer service-skills training



- **Improved Productivity** — unlimited and customizable assistance enables call center managers to more quickly move CSRs from training or nesting to live calls
- **Reduced Cost of Turnover by Institutionalizing Company Knowledge** — Jacada Advisor enables centers to maintain a greater degree of CSR knowledge within their systems, lessening reliance on an individual CSR's mastery, and realizing less impact if and when a trained employee leaves the center (which can equal a significant investment).

### Easing the Customer Service Burden

Jacada Advisor creates a customer service environment that fosters an improved customer experience. Using patented technology, Advisor leverages non-invasive integration methods to simplify the customer service process and provide CSRs with the information they need, when they need it, in an intuitive visual format they can really use.

More than another application, not just one more tool for the call center, Jacada Advisor offers three primary functional features: desktop automation, application bubbles, and embedded interaction management.

### Automating the Desktop

The desktop automation capabilities inherent to Jacada Advisor are the core of the solution, enabling front-line service personnel to have



an automated and integrated access point to all relevant customer data. Utilizing an intelligent, customizable user interface, Advisor provide a console view of the various applications, tools, tasks and communication channels required by the CSR to deliver the optimum customer experience.

Automated processes means speed and efficiency. Jacada Advisor enables rapid navigation through multiple screens using defined application events as a trigger. In addition, based on specific application events, Jacada Advisor can copy the contents of one or many fields to other fields within the same application or to other applications. Consequentially, these capabilities allow for one-time login across multiple applications.

### Heads-Up, Contextual Interface

Jacada Advisor leverages “application bubbles” to provide in-line, in-context help and “next-best-action” cues to CSRs, streamlining productivity and eliminating errors. This functionality allows you to maintain your current applications (and the application investment already made) while “supercharging” the usability of the application.

Application bubbles can be superimposed on any application on the CSR desktop, and, because application bubbles are HTML-compatible, the interface can be as dynamic and interactive as desired, even visualizing data from connected applications.

### Making the Interaction Flow

Applying the same technology found in the Jacada® Interaction Manager solution, the embedded interaction management capabilities of Jacada Advisor creates step by step call flows to assist CSRs with complex customer interactions. A rules engine handles complex decisioning or branching functions, and version control provides the ability to instantly enable or revert call flows as needed.

Business administrators can create, edit and maintain interactions with Drag and Drop modeling, and new call flows can be hot-deployed without requiring full desktop involvement. Advisor captures all customer interaction data, enabling KPI reporting and heat maps to identify CSR actions and customer trends.

### Productivity Improvements in a Timely Fashion

The Jacada Advisor suite combines proven Jacada capabilities into a cost-effective, innovate solution. With Advisor, call centers can enable their existing IT investments — be it a CRM solution, sales force automation toolset or other mission-critical system — and get more value from existing applications while reducing training requirements. And, by optimizing the processes already in place, customer service operations can realize increased productivity from their CSRs while improving satisfaction levels for their CSRs and customers alike.

Creating an improved, integrated CSR interface, rich with in-context data capabilities and rules-based interaction management, provides call centers with an enhanced service environment capable of world-class service excellence.

Along with a comprehensive solution designed and implemented by business and technology experts, Jacada Advisor is the cost-effective, time-conscious answer to a chaotic customer service desktop.

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*“In our industry, one bad keystroke, one misplaced decimal point, can mean the difference between right and wrong. By capturing information from one screen and automatically passing it to subsequent screens without re-keying, we were able to improve accuracy and standardize much of what we do.”*

*— large U.S. benefits administrator*

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### Key benefits of Jacada Advisor include:

- **Desktop Automation** — automated navigation, cross-application copy/paste functionality and login capabilities, plus streamlined data entry
- **Application Bubbles** — HTML container for in-context help and next-best-action dialogs, with the capability to integrate data cross-functionally
- **Embedded Interaction Management** — rules-based call flow administration with visual interface and reporting capabilities, deliverable in-context and at the point of access using application bubbles



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doc. # 28.100.0210*