



Playbook Builder™

Turn conversations into actions that drive business results

Playbook Builder™ elements

Playbook is an information and action framework which combines elements to build conditions and take actions. Each conversation is analyzed for handling metrics, sentiment, topics in real-time or right after the conversation ends. When a combination of business rules occurs in your call center, these actions are invoked to drive business outcomes:

Topics

Topics are collections of keywords and phrases relevant to your CX strategy. Topics can represent key business elements around customer experience and agent's skills and behavior like Greeting, Lack of Knowledge, Cancellation etc.

Themes

Themes are score-weighted collections of Topics. For example, a theme like Positive Agent Behavior could be built from the Topics "Politeness," "Proactive Language," and "Agent Compliments."

Actions

- Send email and SMS message alerts and notifications
- Invoke an AWS Lambda function: for example, run a fraud routine
- Push data to a REST function, such as opening a case in Salesforce

- Send a conversation to the evaluation workspace

Redactions

Redactions represent keywords that you do not want transcribed or stored for business purposes such as credit card, social security, or telephone numbers. Both audio files and transcriptions can redact.

Custom phrases

Custom phrases allow you to take certain homonyms, synonyms, and proper names and ensure they are pronounced correctly by the system based on your business.

Sentiment

Sentiment can be positive, negative, or neutral and can be detected by channel like agent, or the customer. SuccessKPI can also detect sentiment by sentence or Entity like specific product or service.

Use Playbooks to achieve key business outcomes

Operational efficiency

Pinpoint how your organization can reduce the time it takes to meet customer needs. Gain understanding of what triggers customers to initiate interactions and feed this knowledge back into your business processes to decrease operational costs.



Reliable

100%
Uptime

Scalable

100, 1,000 or
10,000+
agents

Immediate

Activate the SuccessKPI platform in minutes with an out-of-box connector with leading cloud contact center platforms.

Agent turnover rate

Discover conditions that cause agents to leave and provide proactive support and targeted training to improve agent retention.

Vulnerable customers

Identify early signs of customer vulnerability and take steps to support those customers throughout their interactions with the organization. Correlate sentiment with customer retention down the road using our enterprise BI layer.

Compliance

Monitor how well you meet regulatory requirements for customer interactions, and how well your team identifies, monitors, and manages poor vs. successful customer outcomes.

Task Automation

Playbook can allow businesses to take action based on business rules like creating a lead in Marketo if there is a purchase intent or a Case in Salesforce if customer is unhappy about a product or service.

Safe, Secure, Compliant

SuccessKPI makes the privacy and protection of the data on our network and platform our #1 priority. In addition to platform security features such as automated PII redactions, SuccessKPI has established a full framework of policies and procedures to protect data in transit and at rest in our SaaS platform. These policies and procedures meet the highest industry standard and are audited and certified regularly in accordance with leading security and operational performance standards, including PCI, SOC2, HIPAA, ISO 27001, GDPR, CCPA, LGPD, FedRAMP and more.

