Angel Associate Assist

Agent Guide

2025

CX Optimized

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Introduction

Welcome to the Angel Associate Assist Agent Guide, your go-to resource for mastering the Associate Assist tool. Whether you're an agent handling customer calls or a supervisor supporting your team, this guide provides clear steps and insights to streamline your workflow, enhance call efficiency, and leverage real-time AI support in the contact center.

Key Agent Benefits and Features

Angel Associate Assist focuses on enhancing agent performance and simplifying their workflow with the following features:

- **Checklists:** One of the key features for Associate Assist, the Checklist provides agents with real-time, step-by-step guidance during calls. It ensures consistent task completion and enhances customer interactions.
- **Automatic Call Listening:** Associate Assist listens to both agent and customer during calls. It analyzes conversations in real-time to offer support. No manual activation is needed, fitting seamlessly into your workflow.
- **Real-Time Suggestions:** Associate Assist delivers instant "to say" scripts and "to do" actions. These match the call's context, such as customer needs or mood, allowing you to better handle issues faster and more confidently.
- **Live Transcript and Search:** The Transcript tab shows a live call transcript and is accessible at anytime. A search feature lets you find specific words or moments fast.
- **Knowledge Integration:** Associate Assist provides instant links to relevant knowledge articles during calls. Access guides directly in the call interface, helping you to resolve customer issues quickly and confidently.

- **After Call Summary Components:** Associate Assist provides an After Call Summary for every call, simplifying your wrap-up process. This saves time and supports accurate reporting.

Access Associate Assist

To use Angel Associate Assist, you must log into your contact center platform and set your status, typically Ready, to accept calls. Then, log into Associate Assist to access its features. This ensures you are ready to assist customers effectively.

Log In and Set Status to Receive Calls

Logging into your contact center platform is the first step you must take in order to access Associate Assist. Log in using your credentials and then set your status to start receiving calls. This also enables you to sign into Associate Assist and assist customers.

> **Note:**
> Login processes differ by contact center platform. Refer to your training resources or contact your manager for specific login and status-setting instructions.

1. Log into your contact center platform.
2. Set your status to a **Ready** state.
3. You are now in queue and ready to take customer phone calls.

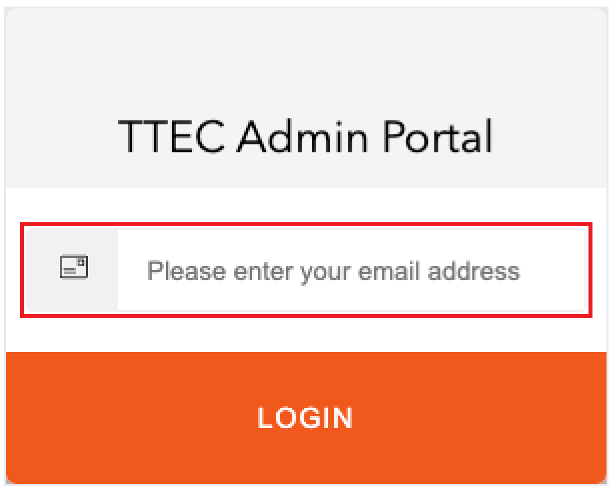
Log Into Associate Assist

After logging into your contact center platform and setting your status, log into Associate Assist using a direct link or through your Customer Relationship Management (CRM). This grants access to its call-handling features.

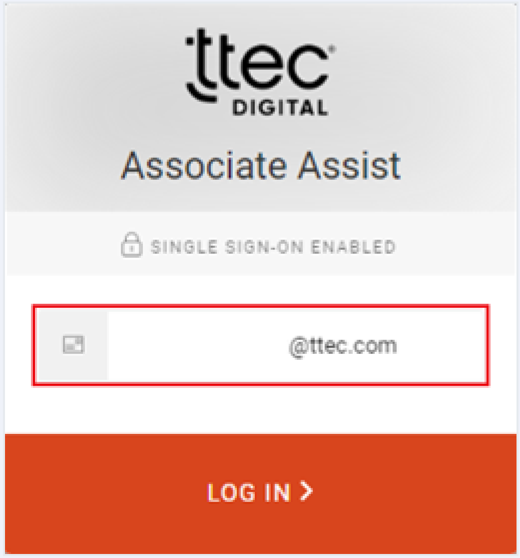
Notes:

- Please reach out to your manager to determine how you should log into the Associate Assist platform for your role.
- Before you can log into Associate Assist, your manager must submit your user name to the Associate Assist product team. This ensures the security and integrity of the tool. Please contact your manager if you are unable to log in.

1. Enter your TTEC email address.
2. Click **LOGIN**.

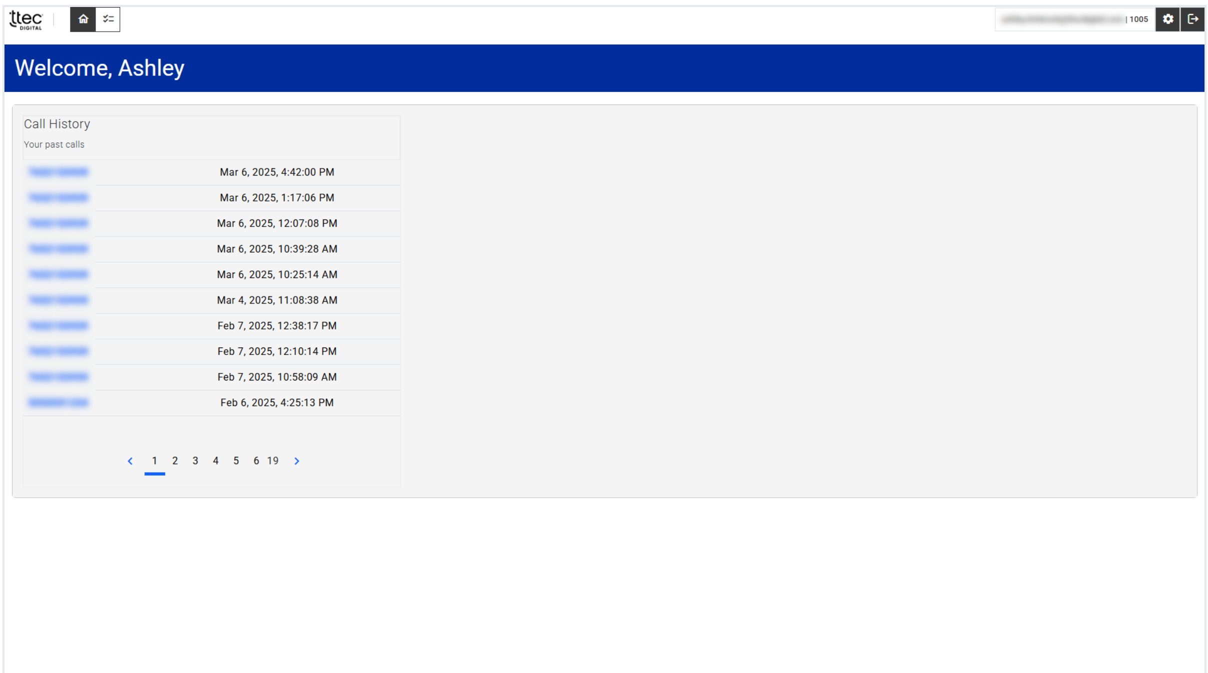


Note:
Log into Associate Assist using your TTEC email address. No password is needed, as it uses TTEC Single Sign-On (SSO) for access.


ttec
DIGITAL
Associate Assist
SINGLE SIGN-ON ENABLED
@ttec.com
LOG IN

Get Started with Associate Assist

Upon logging into Associate Assist, the agent interface displays a welcome message along with your current Call History. This topic guides you through navigating and using the Associate Assist agent interface to help you maximize its call management capabilities.



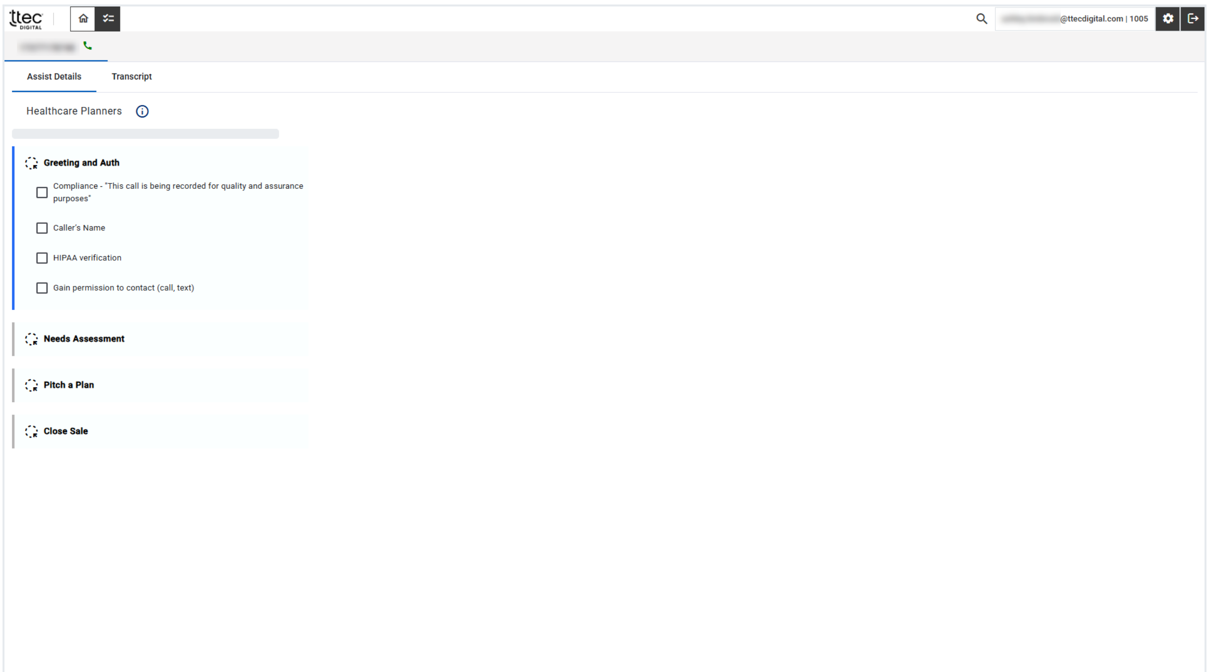
Associate Assist Agent User Interface

Associate Assist operates in your web browser, enabling screen size adjustment for your preferred fit. A navigation bar at the top provides access to all interface features.

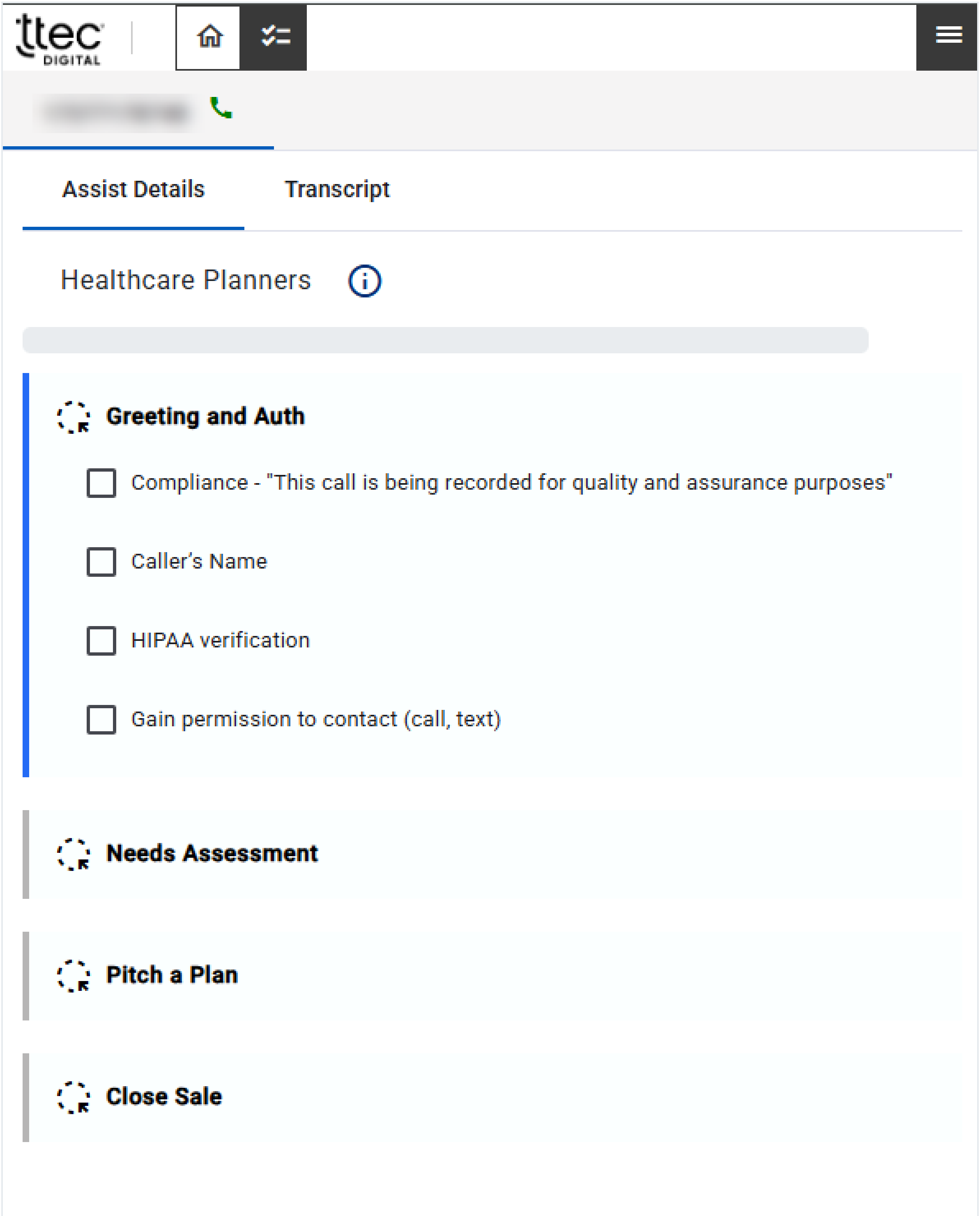
Adjust Screen Size

Adjust your browser window to accommodate the space you need on your screen for Associate Assist.

FULL SCREEN VIEW

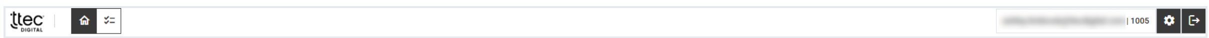


SMALL SCREEN VIEW

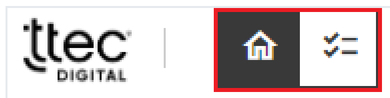

ttec DIGITAL
Assist Details
Transcript
Healthcare Planners
Greeting and Auth
Compliance - "This call is being recorded for quality and assurance purposes"
Caller's Name
HIPAA verification
Gain permission to contact (call, text)
Needs Assessment
Pitch a Plan
Close Sale

Navigation Bar

Use the navigation bar to access the following features:



NAVIGATION BAR - LEFT SIDE

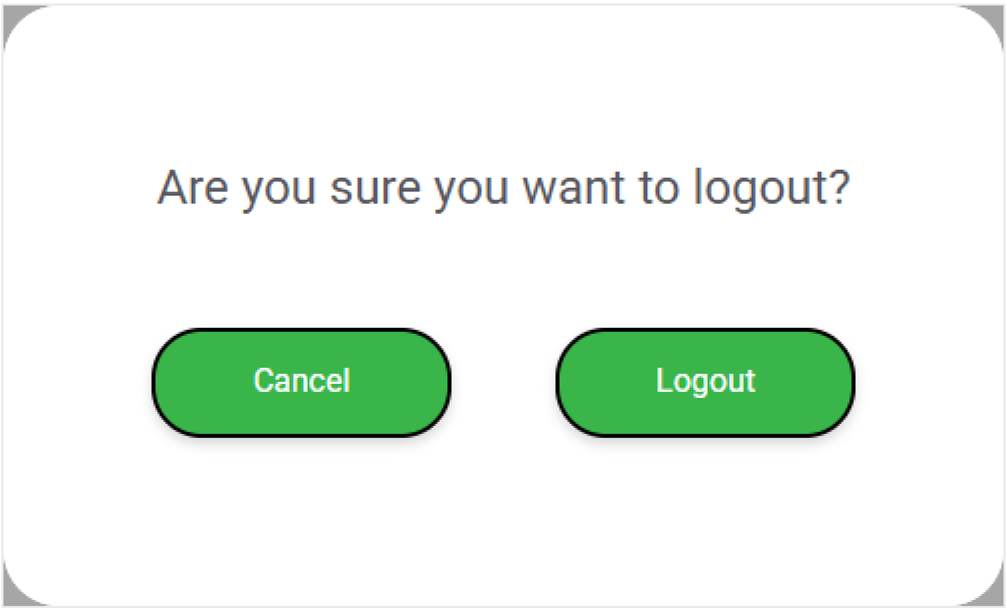


- **Home Icon:** Displays a welcome message along with your Call History list. (*This is the default screen upon login.*)
- **Checklist Icon:** Access the Checklist screen for your current call. The screen contains the following tabs:
    - **Assist Details** – View your call progress through a checklist of key steps, including greeting, authentication, and needs assessment. Check off completed items like compliance notices or caller details to track your workflow. See the "Use Associate Assist During a Call" on page 11 topic for to learn more about the Checklist screen.
    - **Transcript:** – Review the conversation transcript. (*Optional feature, available as needed.*) See the "Use Associate Assist During a Call" on page 11 topic to learn more about using transcripts.

NAVIGATION BAR - RIGHT SIDE

- **Email Address:**Displays the email address of the agent logged into the Associate Assist tool.

- **Extension Number:** The number located to the right side of the email address is the extension number for your contact center platform.
- **Log Out ( ):** Opens a log out confirmation window that allows you to log out of Associate Assist.



Use Associate Assist During a Call

Associate Assist connects to your contact center platform to monitor calls you accept. It listens to you and the customer to provide real-time support, including:

- Tailored checklists that display on call acceptance.
- Checkpoints and steps are completed automatically as the conversation progresses.
- Suggested responses or actions based on the conversation.
- Logs the entire conversation in a transcript which can be reviewed during and after a call.

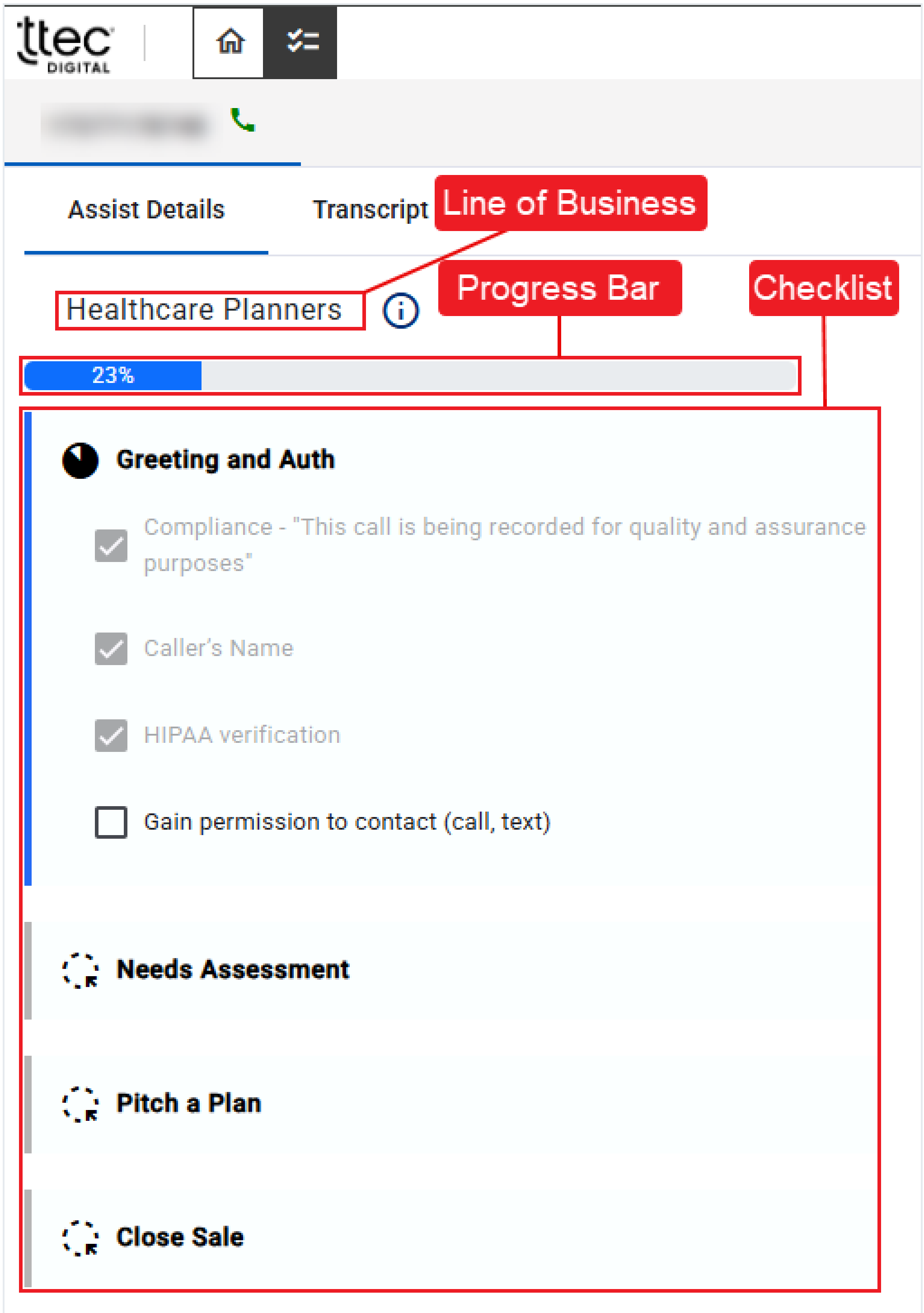
Get to Know the Checklist Screen

When the conversation starts, the checklist screen displays to help you track the current status and progress of your call. Below are the key features for the checklist screen:

- **Automatic:** Associate Assist listens to your conversations and automatically checks off step items you discuss with the caller for each checklist.
- **Dynamic:** The checklist screen dynamically changes during your phone calls to ensure you stay on the right checklist within your conversation.
- **Listening:** Conversations with customers always vary. Associate Assist listens and checks off mentioned items, regardless of whether you are viewing the specific checklist.
- **Manual checking of items:** Our system's AI engine constantly learns from conversations and adjusts. Your conversations may not be 100% automatic for every call. If you see a checklist step you have already discussed, you can click the box to mark it as completed.

Understand the Checklist User Interface

Nestled within the Assist Details tab, the checklist interface displays your call's steps using visual cues, such as a progress bar and icons, to track and manage your tasks.

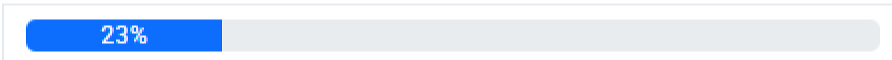


LINE OF BUSINESS

Displays your assigned Line of Business (LOB) for your organization. A LOB refers to a specific service category or client focus handled by the contact center.

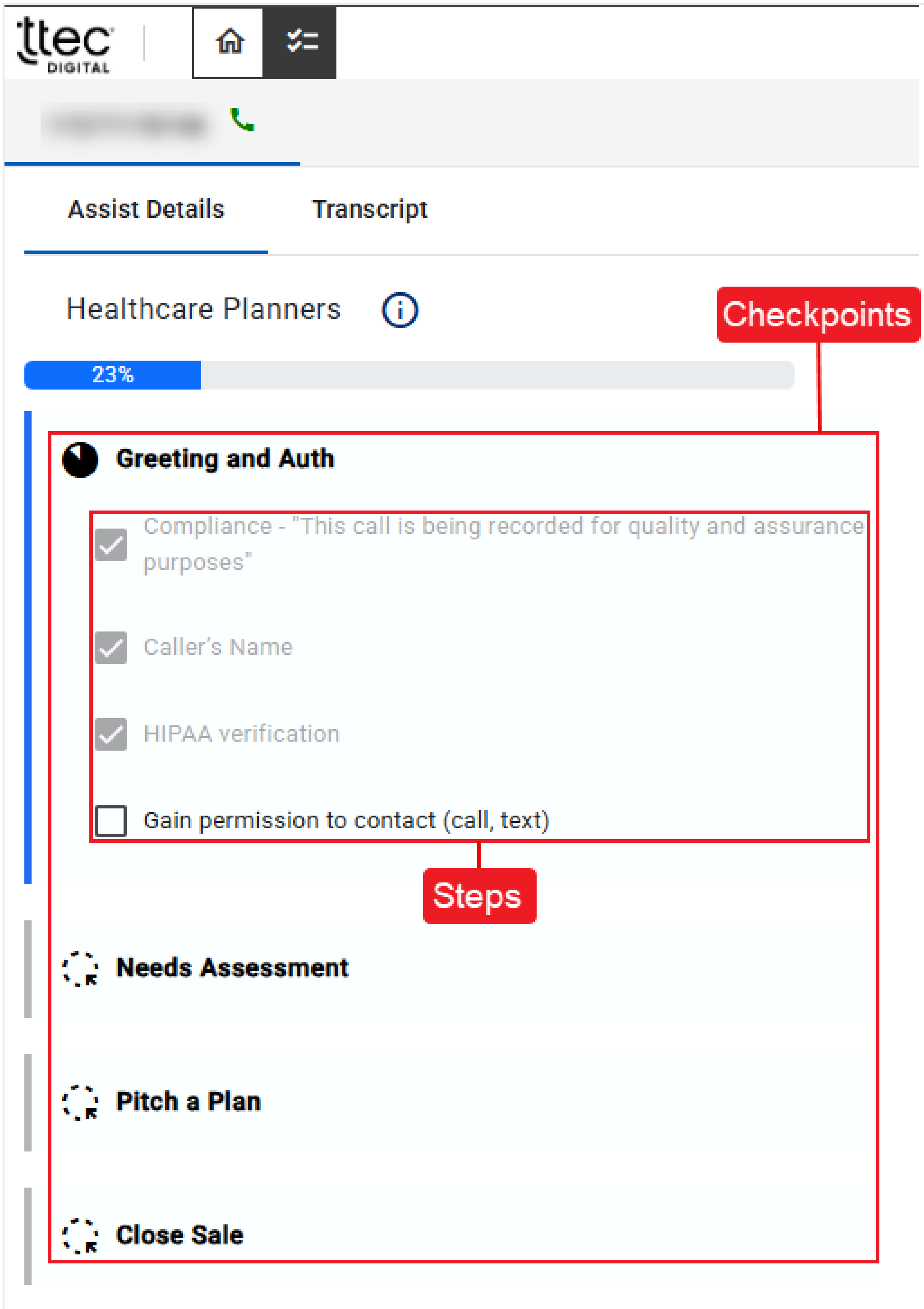
PROGRESS BAR

The progress bar reflects your progress as checklists and steps are completed.



CHECKLIST

The Checklist is composed of multiple **Checkpoints**, each containing a series of **Steps**. Status icons dynamically update to reflect real-time progress throughout the current call, providing clear visual indicators of completion and next actions:


ttec DIGITAL
Assist Details
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23%
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Compliance - "This call is being recorded for quality and assurance purposes"
Caller's Name
HIPAA verification
Gain permission to contact (call, text)
Steps
Needs Assessment
Pitch a Plan
Close Sale

- **Checkpoint In Progress** – Shows your current checkpoint with a pie icon that fills as you complete each step.
- **Checkpoint Pending** – Shows a checkpoint you have not yet started, with no steps completed.
- **Checkpoint Complete** – Displays beside completed checkpoints.
- **Incomplete Step** – Displays beside each step that is not yet complete within a checkpoint.

> **Note:**
> If Associate Assist fails to automatically check a step, you can mark it manually.

- **Complete Step** – Displays beside any step automatically marked as completed by the AI engine.
- **Agent Completed Step** – Displays beside any step manually marked as completed by the agent.

CALLER SENTIMENT

During your call, **Sentiment** reflects the AI's perception of the conversation:

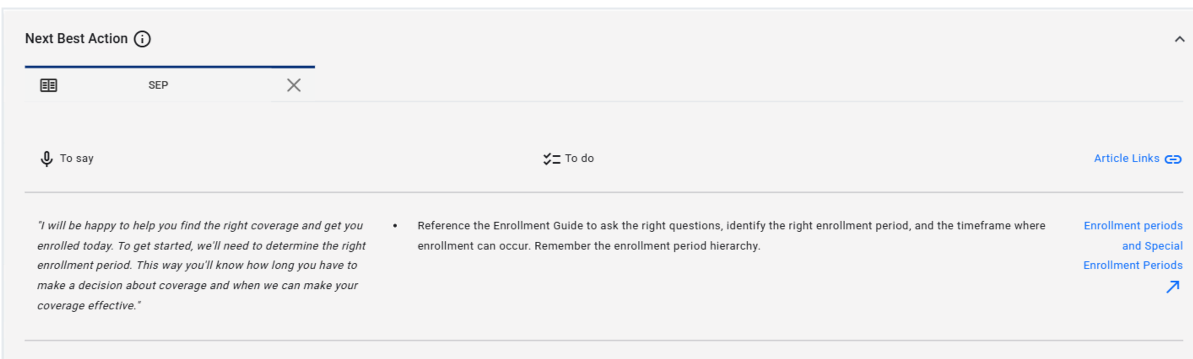
- **Positive** – Indicates a friendly or satisfied tone, suggesting the caller is happy with the interaction.
- **Neutral** – Reflects a neutral or balanced tone, with no strong positive or negative emotions detected.

- **Negative** – Signals a frustrated or upset tone, alerting you to potential dissatisfaction or issues.

> **Note:**
> Negative can also indicate concerns like pricing, not just anger. Discuss options to help ease their concern and improve their experience.

NEXT BEST ACTION

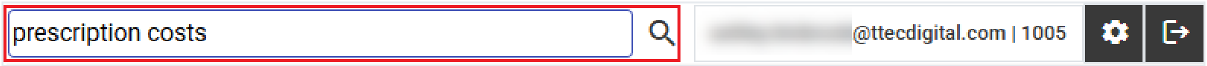
The Next Best Action feature provides real-time call guidance with a suggested script to follow, a task to complete, and relevant article links. For example, it might offer a script to address customer concerns, a task to reference a product guide, and a link to supporting resources.



- **To say** – A generated script for reading or following during customer interactions.
- **To do** – A generated action to perform for effective customer assistance.
- **Article Links** – Links to resources providing quick access to action-related information.

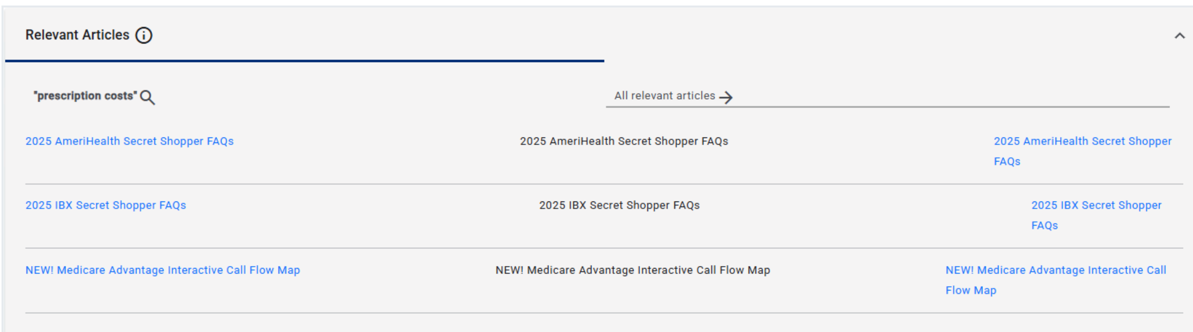
RELEVANT ARTICLES - AGENT SEARCH

During a call, use the search feature at the top to quickly find helpful resources for your conversation. Performing a search opens the Relevant Articles panel.



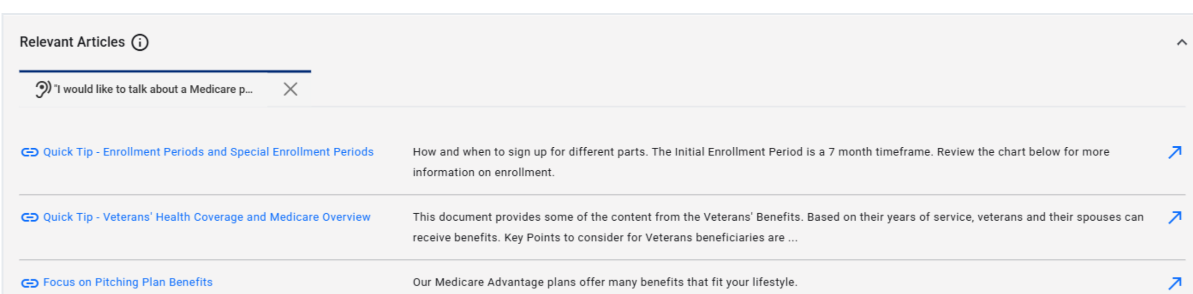
The Relevant Articles panel displays allowing you to view helpful resources you searched for during a call, such as:

- Articles
- FAQs
- Guides



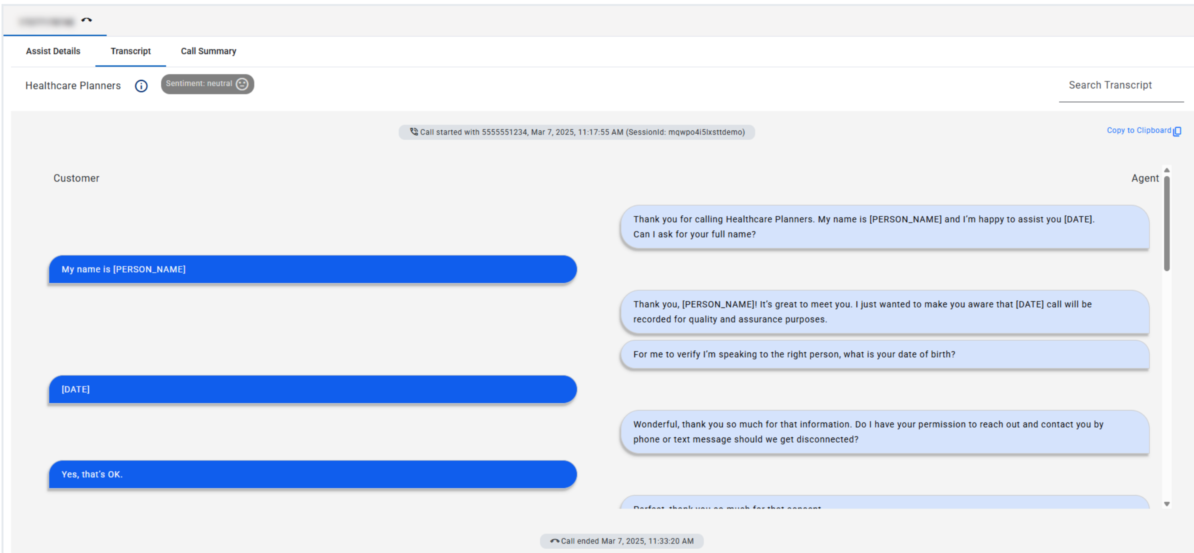
RELEVANT ARTICLES - AI ENGINE SEARCH

The AI engine automatically displays articles in the Relevant Articles panel based on your conversation, marked by a **Heard** ( ) icon. For example, if a customer discusses a specific need, the AI might suggest articles like FAQs or guides to help you respond effectively.



Understand the Transcript User Interface

The Transcript tab in Associate Assist lets you access and view a real-time call transcript during or after the call. It identifies customer and agent dialogue with timestamps, sentiment analysis, and a search feature. Use this to track and review interactions for accurate communication.



- **Search Transcript** – Enter text to locate specific words or sections within the call transcript.
- **Call started** – Shows the call's phone number, date, time, and the assigned session ID.
- **Copy to Clipboard** – Copy the transcript to paste into notes or systems for documentation and sharing.
- **Customer** – Transcribed customer dialogue, displayed in blue chat bubbles.
- **Agent** – Transcribed agent dialogue, displayed in light blue chat bubbles.
- **Call ended** – Shows the date and time stamp for when the call ends.

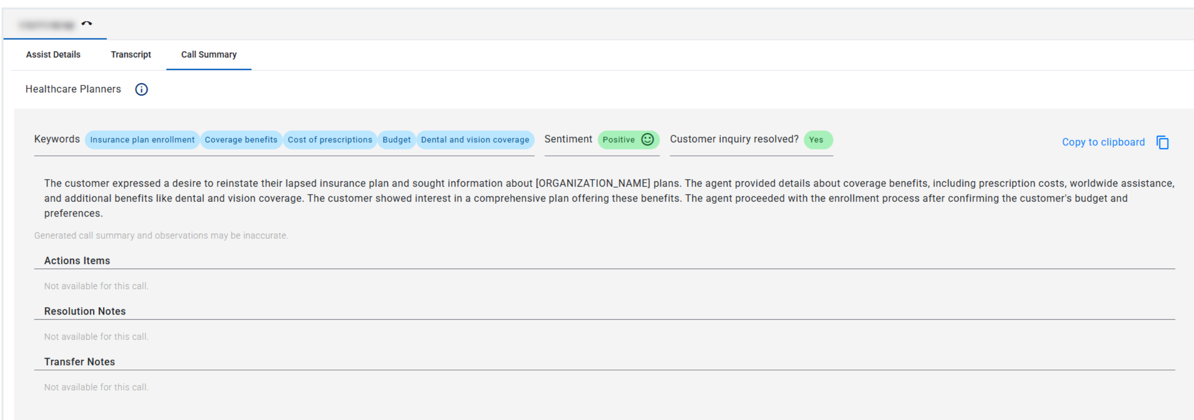
> **Note:**
> Personally identifiable information (PII) is redacted from the call transcript.

After Call Summary

Associate Assist automatically generates a call summary after the caller or agent ends the call, displaying it for agents to review all aspects of their last call. However, no summary is generated if there's insufficient call information, such as a poor telephone connection preventing the agent from hearing the caller, leading to a hang-up.

Using the Call Summary

The Call Summary in Associate Assist provides a detailed post-call overview. It includes key elements to help you review the entire call dialogue and outcomes.



- **Keywords** – Shows key terms the AI engine identified in your conversation.
- **Sentiment** – Categorizes the call as Positive, Neutral, or Negative. In the Call Summary, the overall conversation sentiment is displayed.
- **Customer Inquiry Resolved** – Indicates if the initial question was resolved (**Yes** or **No**) to support first call resolution goals.
- **Copy to Clipboard** – Allows you to copy the summary for pasting into call notes or a CRM during wrap-up.

- **Transcript Summary** – Highlights key transcript excerpts within the overall Call Summary.
- **Action Items** – Lists AI-captured follow-up tasks from the discussion, such as a call or text at a later date.
- **Resolution Notes** – Shows AI-captured details on how the customer's inquiry was addressed.
- **Transfer Notes** – Shows AI-detected reasons and details for transferring the call.