Alerting Process

# Introduction

This document addresses the alerts as follow up workflows to Customers responses based on customized business rules. For a particular response, an action has to be taken.

## Purpose of the Document

This document provides detailed information on the different alert statuses and the requested behaviour, and the setting up of an alert.

The description of this process is intended for professional services, implementers, administrators, consultants, or whomever feels the need to understand the alerting process to set up a notificacion in the system based on responses.

## Terms and Definitions

| **Term** | **Definition** |
| --- | --- |
| Alert | Business rule based on a condition. For instance, response = 0 or response < 3. It can also be based on a sentiment. |
| Alert System / Alerting | Being able to identify a business condition and notify a designated person within the Company of the existence of such condition and the need for it to be responded to. |
| Closing the Loop | Get back to the Customer to take care of an existing problem or negative comment which generated an alert to be sent. |
| Interaction | Feedback provided by a Customer. |
| Role | The position that a person occupies in a company such as a manager or a customer representative. |
| Sentiment | A way of measuring an interaction with a Customer by analyzing the message input as a positive, neutral, or negative review using text analytics system. |

# Functional Description

Medallia´s systems measure the interaction between a Customer and a Company. When that feedback is processed by the system, business rules are applied to said data to alert the Company of certain circumstances. For instance, when a Customer gives a score of zero.

When an alert comes in, it sets off a notification to a person associated with that business unit; it could be a manager or group of employees. This notification can be delivered to a mobile device (if using the mobile application), be sent to an email, or other configured ways.

Depending on the business rules, that notification needs to be responded in a configured period of time. For instance, if it is a “Close the Loop” situation, the business rule may be configured to send an email to the Customer within a 48hs period.

This process is Customer Service oriented. When certain feedback is provided, an instant alert is triggered so that an action can take place ASAP if needed. To accomplish it, two workflows should be taken into consideration (Refer to sections [2.1](#_jjhavvgppp1c). and [2.2.](#_rd6f4jrxqomt) for more information).

## Alert Status Workflow

The alert workflow has a set of statuses that depict the point where the alert is within the process, these statuses may vary upon the business rules configured. That is to say, the workflow can be modified if needed; for this action, proper privileges have to be granted to the person making the modifications. See below:

1. *New*: When an alert gets triggered.
2. *In Progress*: When an alert is assigned to a person that will start working on it.
3. *Closed*: When an alert is solved. It closes the interaction.
4. *Escalated*: When an alert is not handled within the configured period of time and it is sent to a higher tier level.
5. *Overdue*: When an alert is not handled within the configured period of time raising a flag.
6. Resolved: When an alert was either under the *escalated* or *overdue* status and is now solved.
7. *Contact Customer:* When further actions need to be taken to solve the alert raised. Customer’s information may be shown.
8. *Reopened:* When an already closed alert needs to be further dealt with, for example, due to a Customer’s second contact.

Note that the person receiving the alert usually gets a notification on the mobile application or web form containing a report with the information of the Customer’s interaction. Within that form, actions C, G, and H can be applied.

The following is the most commonly used scenario of an alert status workflow:



## Set Up Alert Workflow

Taking into account that when an alert is received, an action is triggered, a Company can follow the steps described below to set up an alert:

1. *Define the condition that triggers the alert.*
2. *Define actions to take place.* For instance, set the action as status *overdue.*
3. *Define triggers.* When will the action take place. Some of them are predefined, for instance, the ones that can be selected within the form (*Contact Customer* and *Reopened*).
4. *Assignees.* [optional] *The person, role, or automatic response that notify or get in contact with the Customer when needed.*
5. *Alert type settings.*
6. *Define emails.* Emails to be sent under certain conditions.

# System Configuration

Detailed instructions on the configuration of an alarm will be provided in a separate document.

# Error Reporting

No error conditions are described unless a business rule is configured to provide one.

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