

Leveraging Smart Views

Care: Advanced Product Webinar

Host: Tyde Strockbine, Care Coach @ Khoros

April 27, 2023

Khoros 

Introduction + Webinar Housekeeping

**Tyde Strockbine, Care Coach @
Khoros**



- There is a **recording** in progress, and it will be made available on Atlas post-webinar.
- Please post your questions in the **question box** for the live Q&A at the end.
- A **follow-up email** with additional resources will be sent out to all webinar registrants.

What is Product Coaching?

Care

Free 1:1 Coaching Sessions (Topic Specific)

- Available to all Khoros users
- Free 1:1 coaching with a platform expert
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We also offer Quickstart group-style training sessions designed for new users.

Care Agents



Beginner
Intro to Agent View

Care Managers



Beginner
Quickstart: Intro to Manage View



Advanced
Manage View Use Cases

Care Analysts



Beginner
Care Analytics Overview



Intermediate
Understanding Agent Activity Metrics



Advanced
Customizing Your Care Analytics Dashboards

Care Admins



Beginner
Tags: The Foundation of Care



Advanced
Mastering Smart Views

Today's Agenda

1. What are Smart Views?
2. Why are Smart Views important?
3. Smart View Fundamentals
4. Use Cases + Advanced Applications
5. Resources + Next Steps
6. Live Q&A



What are Smart Views?

Smart Views, at a high level, are **advanced filters** that all Care end users can take advantage of.

They filter data based on the following:

- Conversation and author tags
- Work queues
- Priorities
- Business hours

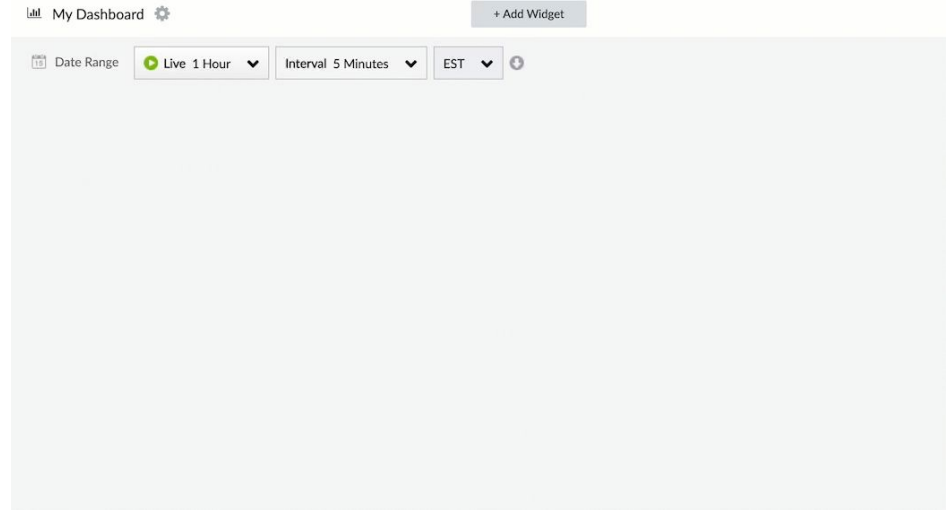
You can choose to apply one or multiple filters in a smart view.

The screenshot shows the 'Manage Smart Views' interface in the Care system. The left sidebar contains a navigation menu with categories: ACCOUNT SETUP (General Settings, Users, Teams, Business Hours, Response Templates, Security), INTEGRATIONS (Source Integrations, Automation Manager), and RULES AND ROUTING (Tags, Work Queues, Priority, Smart Views, NPS/CSAT). The 'Smart Views' option is highlighted with a red box. The main content area is titled 'Manage Smart Views' and includes a '+ New Smart View' button. Below the title, there is a description: 'Create Smart Views to fine-tune which conversations display in an agent's Available Queue and which posts and conversations are included in Analytics Graphs. Smart Views filter data based on a specific set of conversation and author tags and applicable work queues, priority, and business hours. Click Add Users to enable this Smart View for specific agents or teams. Be sure to add a useful description so agents know what they're viewing.' The interface shows a 'Damages' smart view configuration. It includes a 'Conversation and Author Tags' section with a toggle switch, an 'All of These' list containing 'Damages', and an 'Exclude These' list. There are also sections for 'Work Queues' and 'Priority', each with a toggle switch. The top navigation bar includes 'Care', 'Analytics', 'Agent', 'Manage', 'Supervisor', and 'Publisher'.

Why are Smart Views important?

Smart Views are multifaceted. When one is created, an end-user is able to do the following, permissions depending.

- Filter and take action on specific conversations in Agent + Manage View
- View and report on granular analytics on a widget and dashboard basis
- Export granular analytical data



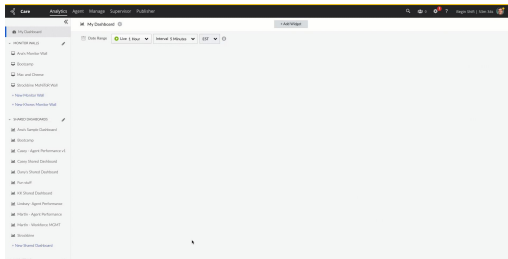
A common use case is filtering widgets by granular smart views.

Creating a Smart View

Before using a smart view, one must be created.

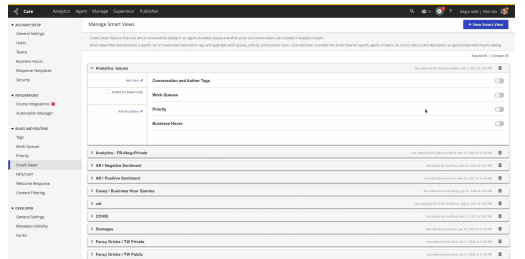
Step One

Those with **Smart View admin permissions** will head to the admin area of Care, click on **Smart Views**, then select **New Smart View**.



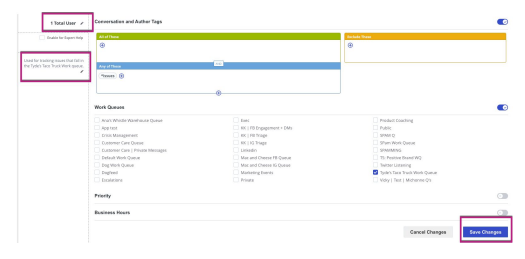
Step Two

Build the Smart View by applying filters **relating to tags, priorities, queues, and/or business hours**. Make sure to give your Smart View a **specific name**.



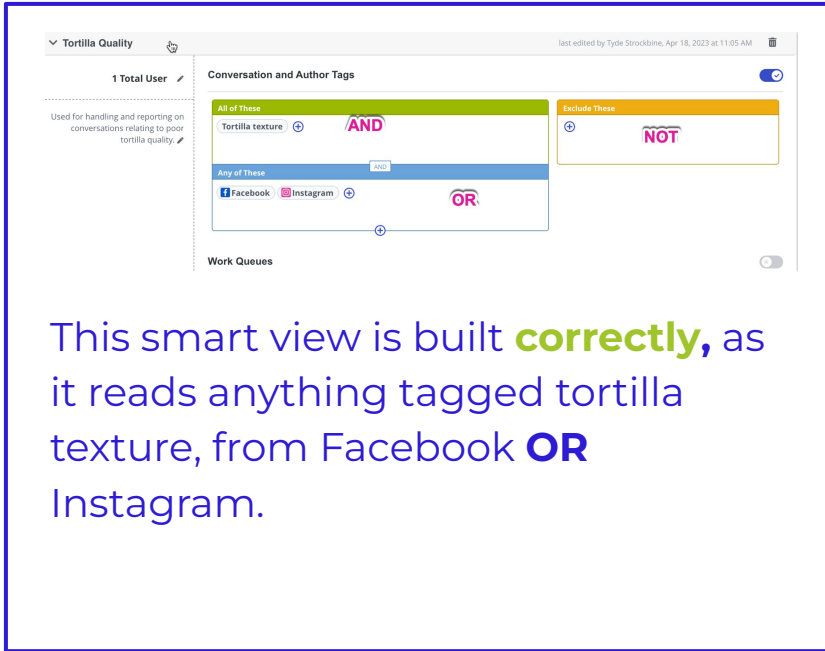
Step Three

Add users, a description for context, and save your newly created Smart View.



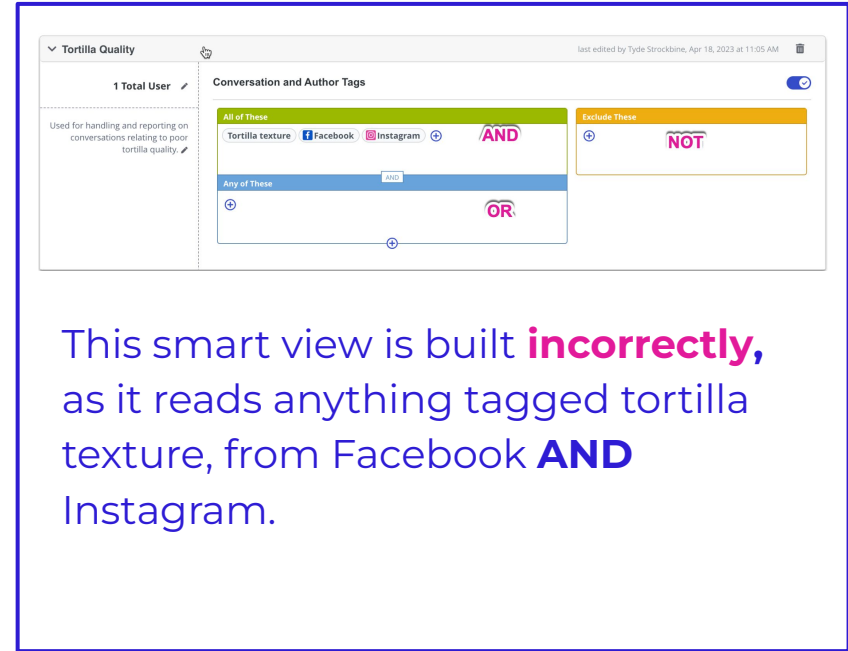
A Common Error

Incorrectly Building Out Smart Views



The screenshot shows a smart view configuration for 'Tortilla Quality'. The main filter is 'Tortilla texture'. Below it, there are two sub-filters: 'Any of These' (Facebook, Instagram) and 'Exclude These' (None). The logic is: (Tortilla texture AND (Facebook OR Instagram)) AND NOT (None). This correctly filters for conversations tagged 'Tortilla texture' from either Facebook or Instagram, excluding none.

This smart view is built **correctly**, as it reads anything tagged tortilla texture, from Facebook **OR** Instagram.



The screenshot shows a smart view configuration for 'Tortilla Quality'. The main filter is 'Tortilla texture'. Below it, there are two sub-filters: 'Any of These' (Facebook, Instagram) and 'Exclude These' (None). The logic is: (Tortilla texture AND Facebook AND Instagram) AND NOT (None). This incorrectly filters for conversations tagged 'Tortilla texture' from both Facebook and Instagram, excluding none.

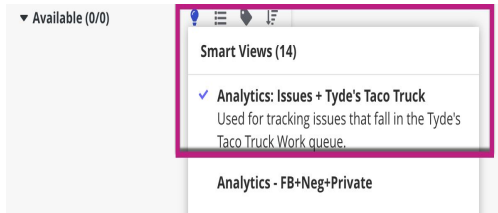
This smart view is built **incorrectly**, as it reads anything tagged tortilla texture, from Facebook **AND** Instagram.

High-Level Smart View Use Cases

Smart Views can be used in Agent, Manage, and Analytics

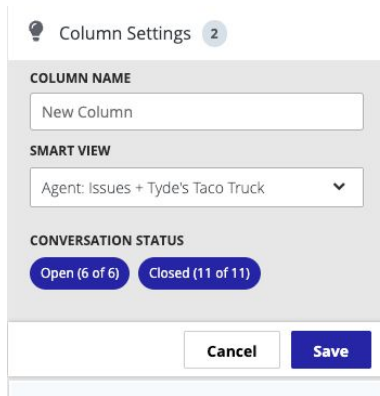
Agent View

Agents have the ability to **filter conversations** by smart views in Agent View.



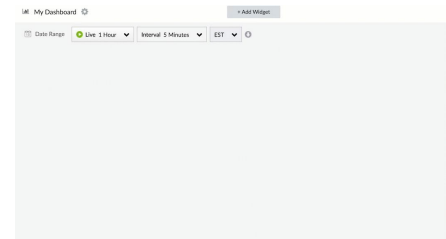
Manage View

Manage View users can **filter conversations** by Smart Views in Manage View.



Analytics

Analysts and managers can leverage smart views at a **dashboard + widget level.**

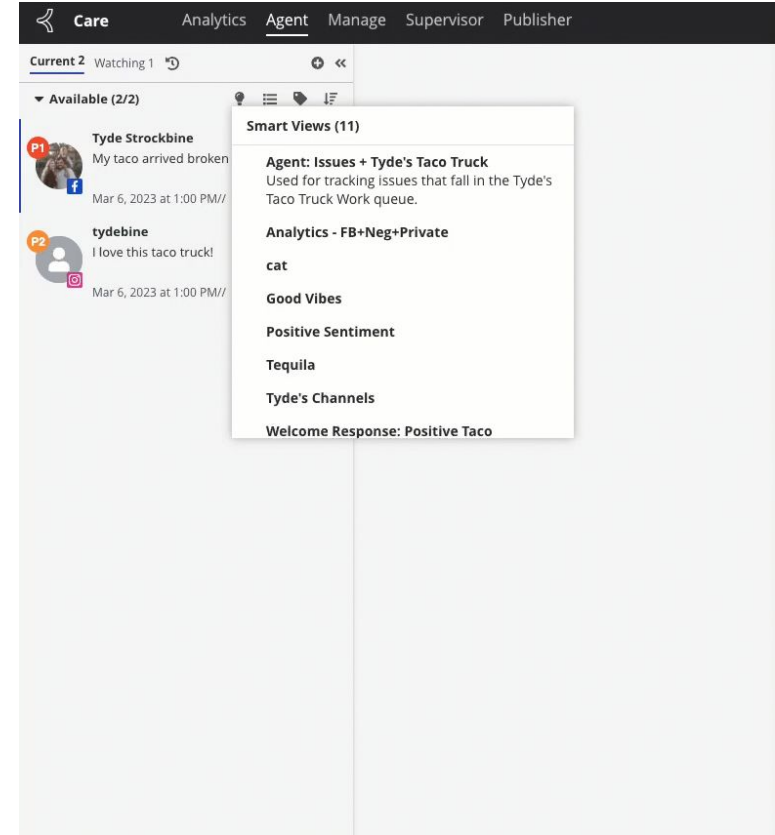


Use Case Example - Agent View

Imagine a **crisis** hits your social network. You create a tag, but you still wonder...

What would be the most effective way to limit the customer wait time for these urgent conversations?

Creating a smart view and giving your agents access is a solution! This would allow them to filter to the conversations that meet the criteria of the smart view, allowing **hone into** those conversations.

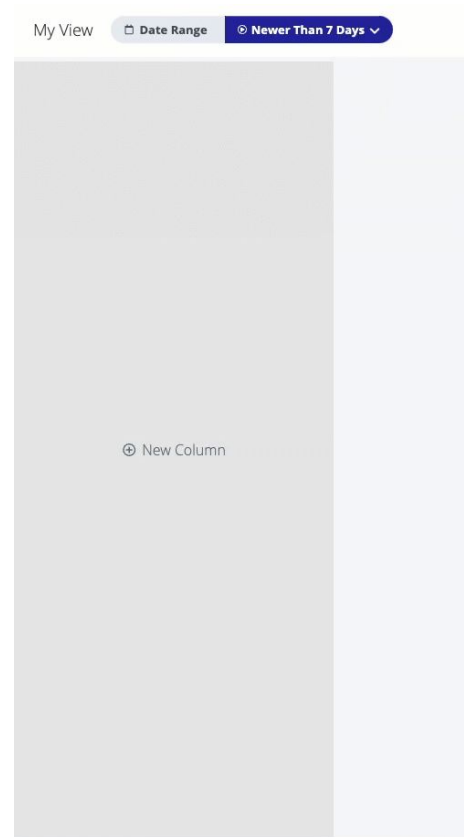


Use Case Example - Manage View

Imagine a **crisis** hits your social network. You create a tag, leverage the smart view in agent, but now wonder...

How do I quickly QA these conversations in real time?

This is another example of the usefulness of smart views! By using smart views in a Manage View column, one can **easily filter** to the open and closed conversations in question.



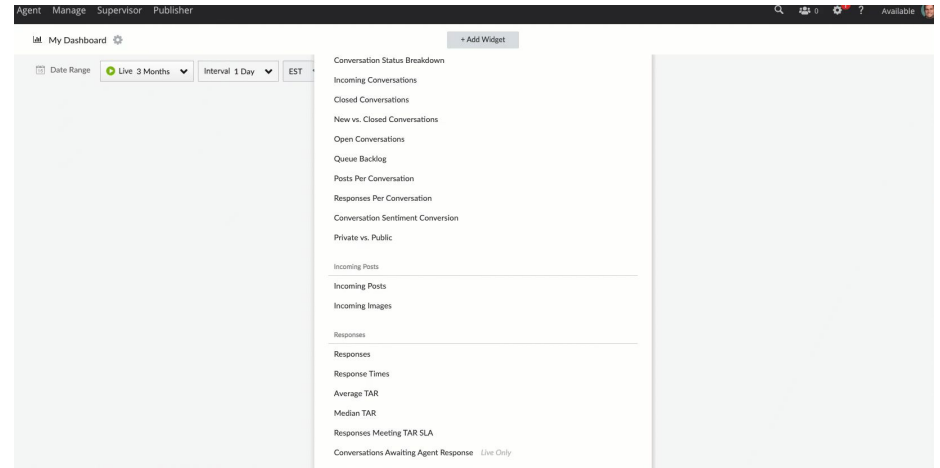
Use Case Example - Analytics

Imagine a **crisis** hits your social network. Agents prioritize these conversations in agent, managers QA in manage, but now you are questioning...

What is the median and average customer wait time for these conversations?

Is it significantly less than the total response?

Filtering specific response widgets to a smart view would answer those questions!

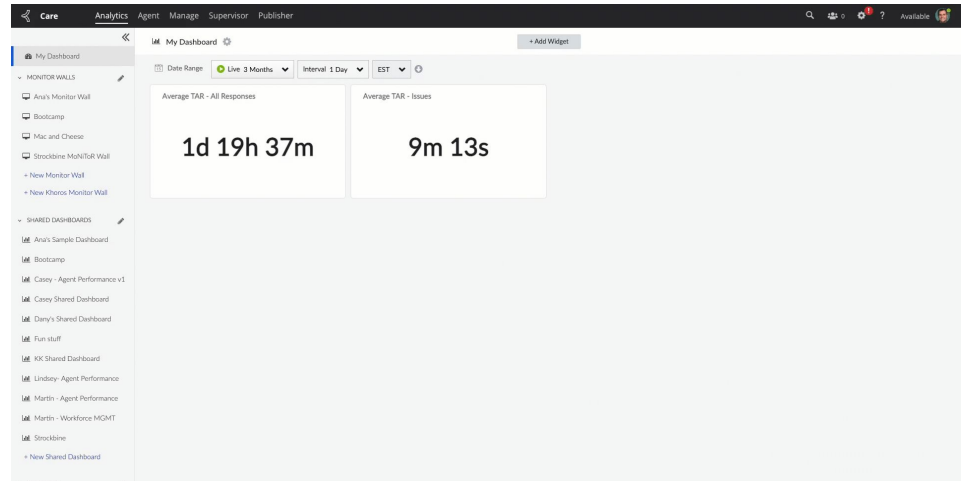


Use Case Example - Operational Dashboards + Exports

Imagine a **crisis** hits your social network. You create a smart view relative to the crisis and utilize through all areas of Care. Now you are questioning...

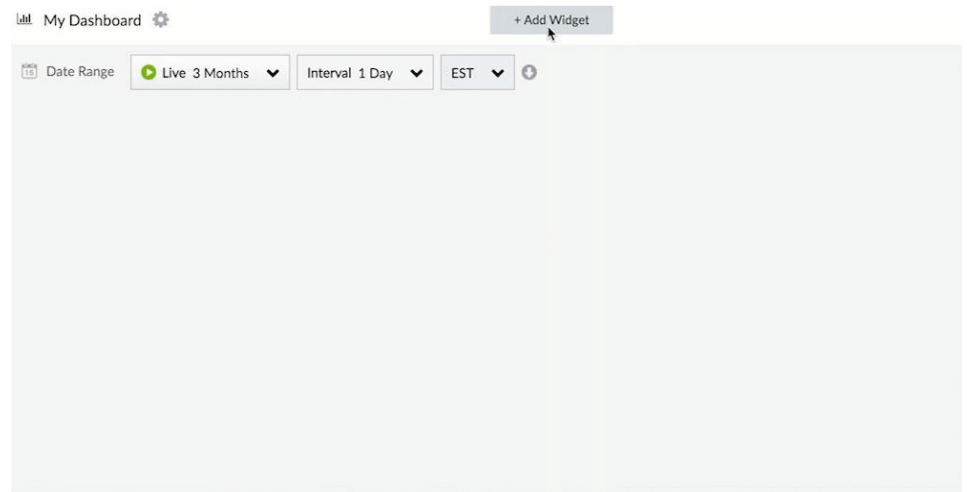
Is there a way to export this data in the form of a raw file?

The quick answer is **yes!** You would use a **smart view operational dashboard to export the raw data.**



More Advanced Applications

- Use the **business hours filter** to report on KPIs like incoming volume and response SLAs.
- Report on **sentiment conversion** related to certain topics **using select tags and/or work queues.**
- Report on **NPS/CSAT survey data** by filtering to a specified smart view.
- Create a **rating-based smart** view to hone in on reviews



Report on sentiment using smart views.

A Common Misconception

Smart Views and Work Queues are pretty much the same...

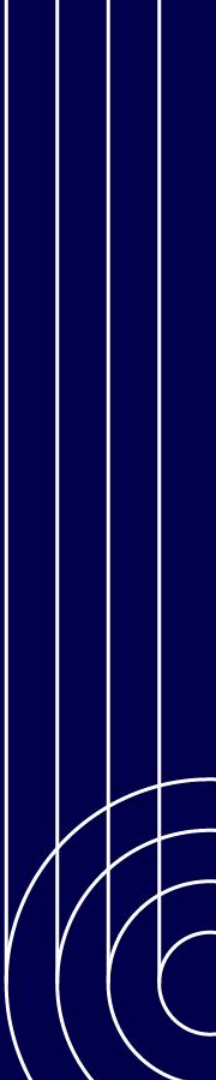
Work queues are where a conversation **lands**, following a “waterfall” approach.

- The order in which they are **arranged** matters.
- It is best practice to only make **edits when necessary**.
- Conversations can only live in **one** work queue.

Smart views are particular **views** into areas of question.

- The order in which they are arranged **does not** matter.
- They do not determine where a conversation lands. They determine which conversations you **see**.
- Conversations can live in **multiple** smart views.

Next Steps.



Next Steps



Look out for the recap email!

Review the resources we covered today, including a recording and docs for further learning.

Create + Leverage Smart Views

Create your own smart views and utilize them in either Agent, Manage, or Analytics.

Schedule 1:1 time with me!

[Mastering Smart Views](#)

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Thank you.



Q&A.

