

Caller Journey Worksheet



Name of Caller Journey					
Goal for this Journey					
Call sources	Online	Offline	Transfers	Other	
When call starts	Add data to call from		Send call data to		Update these analytics
When agent selected	Who are the agents & Call Centers <ul style="list-style-type: none"> • Name • Number • Rules for choosing the agent/center 		Send call data to		Update these analytics
When conversation starts	Messaging to caller				Update these analytics
	Messaging to agent				
	Add data to call from				
	Send call data to				
	Update these analytics				
	Special settings: <ul style="list-style-type: none"> • Recordings • Same caller routing • Hold & Transfer 				
When call ends	Messaging to caller				Update these analytics
	Send call data to				
	Trigger these automations				
	Convert call when				
When call converts	Messaging to caller				Update these analytics
	Send call data to				
	Trigger these automations				