Ohio Data Transfer

THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

Happy New Year

Help Desk Benefits From Using ODT VISION Automatic Attendant with Call Distribution and Emergency Notification

Last month we began a new project with one of our business partners which has elements that could be helpful to all of our customers.

In November, we formed a relationship with Curbstone Corporation. Curbstone produces software to process payment transactions and to connect **IBM i5/iSeries AS/400** midrange systems to the rest of the computing world. Curbstone is a software sales and support organization, specializing in customizable payment processing software for any merchant, with any transaction volume, in any sales environment.

"Customer Service is critical to us. By bringing our support requests back in-house for handling and distribution, we can insure that issues are responded to, and in a timely manner. We now control our workflow and insure that we beat the 30 minutes response we promise!"

Ira Chandler CEO, Curbstone

Why Did Curbstone Need the ODT VISION VRU?

Since Curbstone's product deals with credit/debit card processing, there can be no down time and clients on service contracts are guaranteed a 30 minute response time to Tech-Support issues. This is a 24/7, 365 days a year type of support application. After-hours was always handled by a 3rd party message service which took the calls and then tried to pass the information on to an available Curbstone customer support employee. Sometimes the answering service didn't properly forward the messages or the Tech Support request just got lost in the translation. These technicians could be in the office, at home, or at other sites, but the requests needed to be forwarded

immediately so the best possible support could be provided.

How Is The Call Defined?

Although the ODT VISION can collect Caller Id, this application is not using that feature. The first question the ODT VISION VRU asks is a menu response to define the type of call. The menu speaks,

Please Press 1 for Tech Support, Press 2 for a demo of our software using the ODT VISION VRU, Press 3 if this is a sales call, Press 4 if this is an administrative call, or ANY OTHER KEY to repeat this menu.

Continue on next page

Benefits
- All calls are logged, time-stamped, and forwarded automatically
- Built in audit trails to maintain quality control
- If call is not addressed in 30 minutes, incident is forwarded to next level

Automatic Call Distribution **ACD**
Routing a call based on information provided by a caller using a voice system

Curbstone Corporation
201 Enterprise Court
Ball Ground, Georgia   30107-6105
888-844-8533 US toll-free
770-737-3045 Worldwide Voice
http://www.curbstone.com/

Always Follow the Golden Rule

The *Golden Rule* in any Voice System is "don't ask a question that the caller may not know." It is Curbstone's goal to make the request for Tech Support as easy as possible. The caller may not know their account or service contract number. There are only four pieces of information we need from this caller:

- Type of Request (i.e. Tech Support, Sales, Administrative)
- Callback phone number
- Name & Company
- Record message which defines the request or problem

The last two elements of this collected information are recorded sound files which are converted to a standard "wav" format. The information is spoken back to the caller for verification and a control number is assigned to the request. Next, log and database records are created containing the information regarding the request including a date/time stamp.

How the Request Is Processed

Two main traits define this request. The first is whether the office is open or closed. Built within the ODT VISION VRU is a feature under setup in the configuration which allows the unit to know if the office is open or close. The second main characteristic is the type of request. Within the employee database are 3 tables. The first table is used for tech support personnel. There are also database tables for sales and administrative personnel.

Your product can be great but if your customers service fails to meet the expectations and requirements of your clients, you are dead in the water. Any business relationship has problems. The firm which can handle adverse situations will be champions in their clients' eyes and have a competitive edge.

During business hours, the caller can be transferred based on the ACD to the proper active personnel. Outside business hours, the Curbstone employee is called and assigned the incident. Once the call is assigned, the database record reflects who the event is given to. That individual then calls into the ODT VISION to post the results and how the request was handled. If no one is available to take the event, it goes to a level 2 status where additional resources are called upon.

Quality Control Assured

Built within the ODT VISION VRU is a schedule program which runs in the background. Curbstone has created a continuous loop routine which is monitoring the event database table to see if a tech support incident has not been addressed within the 30 minute period. If for any reason, a failure happens, the event goes to a level 2 status where supervision personnel is notified to get involved. No event can go unassigned or not addressed.

Future Enhancements

In the future, reports will be created which analyze how well the system and customer service is working. Also, clients may get an e-mail notice as to how an event was handled.

By moving the event scheduling in-house, Curbstone has better control over what needs to be done and who it should be assigned to. The logging and audit trail is improved and in general customer service is better. Although a client may think they would rather talk to a live person to report a problem, this is more efficient, cost effective, and doesn't allow anything to not be addressed in a timely fashion. The failsafe level 2 will not allow any event to go un-addressed. ◘

Lennox Management Group takes a new Direction

For a number of years, when one of our clients needed a fax interface we turned to one of our VARs who had expertise in providing fax technology. In the past, their primary focus had been on fax automation and unified messaging. LMG has taken on a new focus and is now combining their expertise in faxing with the ODT VISION VRU.

LMG offers their expertise in:
- Interactive Voice Response Solutions and Customization
- Communication Automation
- Fax Interface
- Unified Messaging (fax, voice, text messaging, digital paging)
- Management Consulting in Communication Streamlining

With their experience in automating the way companies communicate, Lennox Management Group proves to be a positive addition to the ODT VISION family of VAR's.◘

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888-225-5564 Toll Free

Potpourri of Specialized Applications

This month's "Application In the Spotlight" article is the fifth of an ongoing series which we call, "Potpourri of Specialized Applications." Many times a client will install the ODT VISION Voice Response Unit for a specific large application, but its ease of use and customization will later allow for new functions to be added to provide even greater customer service flexibility. Some of these applications have already been done at our clients' sites and some are in the planning stage.

Query Reports Faxed on Demand

One of the outstanding abilities of the database structure of the iSeries/AS400 is the ability to build query reports overtop of any database. If you have a LAN or system fax interface and incorporate this with the ODT VISION Voice Response Unit, you now can provide your users with a form of "Query report on Demand". If your fax interface appears to the host system as a printer out-queue, it is a very simple process to recall an existing query report and insert a customer account number and fax number supplied by the caller. This

allows customers the ability to obtain their own reports on a 24/7 basis without any additional equipment other then a phone and fax interface.

Insurance Firms Provide Policy Status 24/7

A number of our Insurance accounts need to offer 24/7 policy status to providers. A family may be on vacation and have an emergency at 3:00 AM. In the morning. The hospital providing the medical treatment needs to know the current status of the policy. A simple approach to this would be for the caller to call the ODT VISION VRU and identify the policy in question. From the host data after the caller has entered the proper policy control number, we check to see if the policy is current by gathering the "effective date," (date policy was put into effect) and whether or not there is a termination date. By reviewing other information regarding the policy such as group number and division number, we can identify what schedule benefits document (document

which outlines what the policy covers) is specific to this policy. This will be sent out with a cover page outlining the status of the policy, a disclaimer page, and the "schedule benefit document," which may be found on the LAN and be defined from a look-up in a database table. All that is required from the caller, other then the policy number, is their 10 digit fax number. This compilation of documents is then faxed to the provider, giving them all the necessary information for service and billing.

Daily Pricing & Stock Inquiry

Some verticals such as the petroleum industry have daily pricing changes and inventory is always in flux. A client's purchase decisions may be based on the spot market pricing and stock availability. To make this even more interesting, the call could come in in the middle of the night and from a remote location where the client is mobile, such as a call coming from a cellular phone from a truck driver making deliveries. ◘

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HOW DO THEY DO THAT?
Syntax for Automatic Call Distribution & Emergency Notification

General menu

```
;----------------------------------------------------------
; General Menu
;----------------------------------------------------------
Menu:

Cleardigits
ReturnCode = Play "Optn.vox",0,"@"    ; "Please press 1 for
technical support, Press 2 for a demo of our IVR with credit
card application demo, Press 3 if this is a sales call,
Press 4 if this call concerns an administrative function or
any other key to repeat this menu
OptionInput = GetDigits 1,"@",10


If OptionInput = "#" then GoTo Callterminated;


;----------------------------------------------------------
; menu option 1  Tech Support
;----------------------------------------------------------


If OptionInput = "1" then ;
rtn = Play "yourCall.vox"  ; your call is very important to
ups and a technician will be call you back within 30 min-
utes, we will be asking you a few questions for that call
back
CallType = "TechSupport"

……………….
```

Sub-routine to gather Caller's Information

```
**************************************************************
; **** subroutine for call information
;**************************************************************
*
CallerInformation:

GetPhoneNbr:
ClearDigits
Rtn = Play "Phone.vox",0,"@"        ; "Please Enter Your 10
Digit Phone Number...
Rtn = GetDigits 10,"#",25
PhoneInput = DigitBuffer
lpi = length PhoneInput
If lpi <> 10 then
      Goto GetPhoneNbr
Endif
ClearDigits
```

```
Rtn = Play "SayYourName.vox",0,"@"; "At the beep, please say
your name...
Beep
NameFile = StoredMsgFilesLoc & ControlNo
NameFile2 = NameFile & ".wav"
NameFile = NameFile & ".vox"
Rtn = Record NameFile,0,"@",30,5,true
VoxWav NameFile
ClearDigits
Rtn = Play "RequestCallinfo.vox",0,"@"   ; "At the beep,
please say reason for call followed by the # key
Beep
Reason = StoredMsgFilesLoc & PhoneInput
Reason2 = reason & ".wav"
Reason = reason & ".vox"
Rtn = Record reason,0,"@",30,5,true
VoxWav reason
Play "YouAre.vox"; Stack the "You are..." message in the
buffer
Play NameFile                ; Stack the Name in the buffer
Play "TheCallreason.vox"     ; Stack the "reason for the
call..." message in the buffer
Play Reason              ; Stack the Address in the buffer
Play "WithCallBack.vox"    ; Stack the "with the callback
number of..." message in the buffer
Rtn = Speak PhoneInput     ; Now play everything in the
buffer along with the Phone Number
ClearDigits
Rtn = Play "Ok.vox",0,"@"  ; "Press 1 if okay...
OkSelect = GetDigits 1,"#",5
If OkSelect <> 1 then
      Goto GetPhoneNbr
Endif
If calltype = "TechSupport" then
       Rtn = Play "ThankyouT.vox"  ; We appreciate your call
regarding tech support and a technician will be calling you
within 30 minutes
else

      GoSub officestatus

      If OfficeStatus = "Open" then
            Rtn = Play "ThankyouO.vox",0,"@"  ; We ap-
preciate your call, The office is open and a curbstone repre-
sentative should be back with you within 30 minutes.
      else
            Rtn = Play "ThankyouC.vox",0,"@"  ; We ap-
preciate your call, Unfortunately, The office is closed so a
curbstone representative should be back with you on the next
business day.
      Endif
Endif
return
```

The information is now written to both a log and database table. Next a Curbstone employee is called or the call is transferred based on whether the office is open or closed. If an event is not addressed in a timely fashion, a manager is contacted by the ODT VISION VRU to address the situation.◘