

Three Phases of Customer Service

Marketing and supporting the Vision Voice Vantage's **ODTVision Voice Response Unit** is a very interesting challenge as we deal with all types of firms that have all types of business requirements and needs. What helps determine how to address the client's needs is defining three distinctive levels of business to business relationships. This month's newsletter will cover the three areas of the relationship and define what are the elements, requirements, and essential goals of each level.



Phase 1: Marketing and Education

Potential customers come to Vision Voice Vantage from so many different sources. They may be a referral from IBM or a business partner. Some firms discover us on the web or learn about us from another firm or past customer who are now carrying our business card. Sometimes a software firm has worked with us in the past or has read a previous article/case study that has been published regarding our solution. All types of firms use our product from very large fortune accounts to small Mom & Pop operations. We don't call upon any particular vertical or geographic territory....we literally have customers from Alaska to the southern tip of Florida....and

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they all have one thing in common.....a need to add a new or replace an existing telephony self-service solution. The reasons vary as much as the type of firms we see. It may be:

- To reduce the cost of providing customer service
- To improve customer service by addressing customer's requests 24/7
- To stretch existing personnel
- To build audit trails and track customer's needs
- To support customers that can't be supported by existing staff such as providing support to speakers of other languages
- To ensure the privacy and security of the clients and the application data
- To provide a self-service solution to users who are not technically sophisticated, don not have internet access, or do not have any equipment other than a standard phone.



Bottom line, in the beginning the potential customer may not know about us and we certainly don't know about them and what their needs are. This is a two way street where we



need to start communicating with this prospect about what they are needing to do. Vision Voice Vantage always starts with the educating them on:

- The features of our solution
- How customization is done
- How we interact with a client to do implementation
- What the cost and ROI for applications are
- How system administration works on the ODTVision (how to run and maintain the software)

It isn't just us providing the potential client with what we do, but we need to learn their side of project. You can't start the planning and design of an application without understanding:

- The client's system(s) or data sources
- The client's environment
- The client's users and their needs
- The applications themselves
- The number of lines to support the required call volume
- Any unique features or requirements of the application

During phase 1 of client relationships we are interested in the client learning and feeling comfortable with our solution so the decision process is easy. There may be time restraints where we are waiting for a capital budget period or approval. There could also be scheduling restraints where internal personnel are not available to work with us until a previous project is completed. When the time is right and it makes sense, we are given the green light and we actually now have a project. Now the Marketing and Educational phase has been completed and it is time to move to Phase 2, "Design and Implementation".



Phase 2: Design and Implementation

At this point, we get into much more detail. Included in the purchase of the ODTVision VRU solution is a one day on-site visit where training, customization, and setup is included. A goal is set where as much as possible is done before that installation day. One would be in error to think that this one day can do it all. Successful implementation requires a team approach where things happen over a period of time where there is a lot of communication and team work between the

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<http://www-304.ibm.com/jet09002c/gsdod/solutiondetails.do?solutionId=25001&l>

client and Vision Voice Vantage personnel. Once a deposit check is received, the new unit is loaded with our software and is shipped to the client's site. An installation date that works for everyone, where Vision Voice personnel schedule to come on-site, is established. At this point, we start to examine the project from a design perspective and formulate a game plan for implementation. Within this game plan are elements that each firm must provide.

Before Installation Day

From the client's side:

- Assign a technical contact for client's application. This assigned contact and VVV personnel will do a conference call outlining the battle plan for the actual day of the install
- Schedule installation day
- Work with VVV via phone and email to formulate flow chart for application
- Provide a location for installation of the hardware. Connect the ODTVision to the phone system and activate the phone lines
- Connect the system to the data source. If this is an AS/400 we assume an IP connection and you must load IBM Client Access from your host. The LAN connections and security setup need to be done.
- Update Windows and authenticate windows software on the ODTVision. Configure the number of display sessions with client access to match the number of lines or establish ODBC connections
- Build base flow charts of what the application will look like with feedback from personnel within that department
- Get sample data for testing during implementation day. The collection of this data may need to be done near installation day
- Locate a person who will be used for the voice recording and record the voice files
- Create a user ID and profile with needed security for the unit to use in each script. Sign on and test the display sessions or test ODBC link

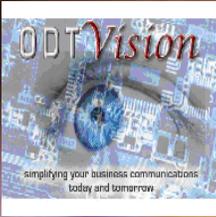
What Vision Voice Vantage needs to do:

- Work with client via phone and email to formulate flow chart for application
- Deliver ODTVision unit to client
- Work on providing base scripts (Requires communications and feedback from client)
- Come onsite for 1 (8 hour day) to configure, train, and develop changes to script to run application

On Installation Day

- Check that all the pre-installation assignments are completed (LAN connections, host connections, voice files recorded, scripts created, etc.)
- Give tour of the ODTVision System
- Check that the pre-recorded voice files are in the proper folders and in the proper format
- Check that the scripts are loaded
- Compile scripts
- Go into Line Setup and configure lines
- Start and Stop the Operator within the switchboard
- Put system in test mode
- Work with Test Phone
- Modify script and test with sample data
- Test, test, test

Even though we try to work with the account to plan a complete and successful implementation where everything is handled during the installation day, it is not unusual to have open issues at the completion of that day. If the application is quite large and complex, the client has the option to schedule more than one day for on-site implementation at an additional fee. There can be hidden issues that just crop up that give complexity to the installation. We may have environmental issues with the client's site such as no phone lines yet installed at the time of the on-site visit. Sometimes the client gets excited when they learn of all the capabilities of our solution and now want to modify the base application to incorporate more features or new logic that wasn't discussed in the design of the basic application. There are often residual



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THINKING OUTSIDE THE BOX

Get Your Own Demo Today

Contact us to get your own demonstration of the ODTVision Voice Response Unit. This demo application is a simplistic order entry and shipment status system which is running off a Microsoft Access database. The demo is in the test mode and you will be using the "Test Phone" feature of the ODTVISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

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issues such as a need for re-recording of voice files to change the voice banners as different text just sounds better in the stacked voice patterns. One of the things that the VVV personnel bring to the table is examples for different situations that we learned from prior installations. The new client can learn from our experiences and many times are delighted at the end of the on-site visit not only with the solution but what they have learned about providing improved customer service.

We have then met two primary goals:

1. Install unit's hardware and software
2. Train the client's personnel to administer their own system and to be able to perform further customization in-house

Phase 3: Ongoing Support

The fact that the client now has installed our solution and have their application(s) running doesn't mean that the teamwork between this firm's personnel and Vision Voice Vantage personnel is over. The

client can always contract with us for design and customization work in the future. They may choose to purchase upgrades for new releases, additional lines, or add one of the options available for the ODTVision VRU. One of the reasons for these monthly newsletters is to educate not only potential clients but also existing clients on what can be done. The newsletters highlight different approaches to perform certain tasks.

I say over and over again, "the more you are able to do with our solution, the more it pays for itself and that is good for us". I have a common montage, "You just aren't using our solution enough, you could be doing more with it" and ...that frees up personnel to handle calls that actually require human intervention."

It is a new day in customer service. Most large firms have some form of IVR self-service applications to filter off routine callers and maximize the existing personnel. It has become as much an industry standard as voice mail. In these tough economic times, it is really required by all business of any size or type. If you have any questions regarding the creation of a self-service telephony solution, please feel free to call us or visit our web site. We look forward to discussing your customer service needs. ■