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Do You Have Any Resources That Need to Be Scheduled 24/7?



There is an old saying, "Time is money" and it is true in most aspects of business. "Do you have any resources that need to be scheduled?" Every organization strives to have an efficient, effective, and easy to use policy towards dealing with client's needs. Let's call it the **3 E's of**

**customer service**. The reasons for appointment or resource scheduling can vary. Type of appointments or resources also will vary greatly from organization to organization but there are common elements that the ODTVision VRU can address when you convert to a solution where an automatically attendant now does the scheduling 24/7. Bottom-line, most likely the event/resource scheduling means money for your firm. This could be a medical center where appointments for physicians, departments or procedures are being scheduled. Perhaps it is an event such as the scheduling of tee times at a golf course or even a hair appointment. For example, lets say you are doing logistics where you are scheduling dock appointments in one or multiple warehouses. No matter what your scheduling needs are it can be automated through the ODTVision VRU. This month's newsletter deals with some of the common elements of scheduling.

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Common Elements in Scheduling

- ⇒ Ability to automatically schedule concurrent reservation calls, cancel or re-schedule scheduled appointments via automatic attendant
- ⇒ Ability to manually schedule, cancel, or edit appointments
- ⇒ Ability to log all calls with date/time stamp
- ⇒ Ability to set hours of operation based on day of the week
- ⇒ Ability to set different intervals between appointments based on day of the week or type of appointment
- ⇒ Ability to set pricing based on day of the week, member/non-member, type of service/appointment
- ⇒ Ability to exclude dates (or hours of a date) due to rules of scheduling (i.e. holiday, events, etc.)
- ⇒ Bocks scheduling appointments times before clock/date of call
- ⇒ Tells caller the available time(s) once caller supplies date and hour
- ⇒ Logs individual appointments status which when changed shows in the individual profile or record



The elements of your scheduling routine may differ from this listing but first outline what your scheduling requirements are and the rules of your scheduling application.

## Defining the User

Planning always start with defining your user and their needs. Do you have the need to support concurrent sessions where more than one user is scheduling an event or reserving an resource at the same time? How sophisticated is your user? Do we need to provide the application in an additional foreign language such as Spanish? Since sometimes the client may be on site, the scheduling system needs to have the ability for manual input from personnel that is assisting the client live as well as the automated attendant. Both types of input needs to work with the same scheduling database. Define how the IVR application also going to provide information on what resources are available if the caller. How does the caller's routine start? Does the caller enters a date and a desirable period of time to schedule the event where they system now matches open dates to that input? Different users may require different resources. Your solution may require the caller to enter into the system what their requirements of this event are. For examples, lets say we have a cross the road truck drive



calling in on his cell phone to schedule a dock appointment for a drop off of an number of pallets at your receiving dock. The driver when they first entered the system entered his load number. Now even though our firm may have an number of warehouses, the load number defined which warehouse the load needs to be schedule for. Now the driver is asked a series of questions that will define the user's needs. Based on the number of pallets entered, the system defines the amount of time required for this appointment. The system now ask a desired date and approximately time that the drive can make for their appointment (assuming the driver know when they will be at this location). The IVR scheduling solution will take the driver's responses to its question and look for an available time slot that fits the requirements of this scheduling request. The driver will be given a number of dock appointment times and dock number that match their request. The driver will now select the appointment they want and perhaps they will be given a confirmation number that they can make inquiries on in the future or even have the ability to cancel and re-schedule later if problem arise. The load profile will be updated that an dock appointment is scheduled. The user's auto attendant interface needs to be easy to use, effective in the ability to schedule

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concurrent sessions both from the auto attendant as well as warehouse personnel who are access the scheduling system manually. Since the auto attendant handles the call cheaper than a live person, it lowers the cost. The three “e’s” of customer service are addressed. (easy, efficient, effective.)

### Defining the Rules of The Scheduling Routine

You first have to see what scheduling policies are already in place. First question, is there a computerized scheduling system in place or is the scheduling application still be done



manually on a paper journal. Obviously if you are still using a paper scheduling workbook, we are going to move this to some form of computerized database. For the purpose of this newsletter, lets say that database is already in place and our IVR application is just laying over top of it. In the previous example of a scheduling request by a truck driver, by knowing some simple responses from the driver of a desired date, time, warehouse location, and number of pallets that relates to the amount of time needed, the scheduling system will now have all the information needed to supply possible appointment times. In the design of your scheduling

system, you have to know where the logic for this process comes from. Is the logic built in the host system/database where the response from the caller is just filling in the blanks of a screen/database or do we have to build the logic in the IVR application itself.

What are the exceptions to normal scheduling routine? Are their days the receiving dock will be closed due to holidays or special functions such as scheduled inventory? Do the hours of operation depend on the day of the week?

### Enhanced Features

Besides the normal scheduling functionality, your scheduling application may have the requirement of enhanced features such as report generation, automatic notification, and various forms of executive decisions built in.

Report generation could be as simple as a listing of what resources are scheduled, by who, and all data appropriate information regarding the scheduled. The ability of the scheduling system may go beyond this where an automatic email is generated to deliver scheduling information to both the departments or even the client themselves such as an email or call reminding them of the appointment. Finally this information from the scheduling database can be used by some form of executive systems to schedule staffing, move resources or even give management notice that some is out of bounds or needs attention.





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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 ODT VISION VRU to simulate a phone call to the data. Manuals and case studies are also available on the web site.

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### Planning is Everything

No matter what your needs are, whether it is scheduling a medical procedure, hair appointment, renting tools, or temporary staff for a client's office,...you really can't create a scheduling routine unless you know all the elements of the scheduling process. It begins with the creation of a flowchart that outlines the caller's progress through the scheduling routine. It must have the logic to fulfill the scheduling application and note whether the logic is coming from the host/database or from the VRU system itself. The golf course tee time scheduling flowchart on the right should provide an example of what your flowchart may look like.

By using our VRU to create an IVR scheduling system, you now can provide scheduling on a 24/7 bases and address the need of concurrent users. The fact that our unit will address your user's requests for scheduling cheaper than live personnel is nice but it also frees up the staffing to do something else that actually requires their attention and take scheduling 24/7. ▣

### Golf Tee Time Schedule Routine

