Vision Voice Vantage, Inc.

THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

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Documenting a Project Analysis

Four years ago this month, the newsletter discussed the three phases of customer service:

- Marketing and Education
- Design and Implementation
- Continual Support

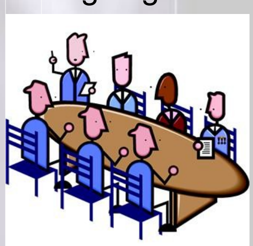
That initial phase of Marketing and Education occurs when a potential new client has come to us looking for a solution to deliver a self-service application they require. It normally starts with an introductory phone call followed with a web/phone meeting to introduce our customizable VRU offering. During that web meeting, the client sees a live demonstration of our VRU solution and how customization is done. We then have a round table discussion of their application needs which our solution will address. This phase of customer relations is a bi-directional communication stream where we are learning about the client and their needs while the client is learning about our product. We start with our features and how through customization, the solution can be tailored to fit their needs.

The Decision Process For An Acquisition Has Changed

Most of the elements of the decision process have not changed. There is:

- defining the needs
- research for a product to meet those needs
- the justification of cost and ROI
- finally, a study of how implementation is going to be accomplished

What has changed over the years is who is going to make the final decision.



Unless you are dealing with a smaller company owner, almost never do you find a situation where the one individual who is working with you during the decision process has the final say. Now almost all sign-offs need to go to a committee.

The need to document the analysis

So through the decision process you have to:

1. Define your needs
2. Analyze your users
3. Define capacity requirements
4. Find a solution
5. Look at various case studies
6. Do financial analysis
7. Formulate a plan of action for implementation

Most likely you know the group of individuals or individual you need to supply documentation to regarding your analysis. Knowing the audience will help define what this report needs to contain. This sign-off group may be familiar with the discussion at hand or you may have to include a definition of what the whole project is. A good abstract defining the analysis will need to be accurately representative of your work, short and present clear logic as to what your results are. It may have elements such as a linear analysis, comparative matrix/charts, bullet points, spreadsheets, and flowchart logic. It may or may not contain how your analysis was done and the scope of your

research. It may point to one vendor/solution or show various products where the committee can decided which is best. Many times, there are tradeoffs that must be detailed in your abstract report if it contains more than one product for comparison. Keep the abstract brief and easy to read or skim. You may build in the report links to a larger background report/data which is all the information you collected if the individuals want more information. The main objective of this report to assist your signoff committee with the information they would require to make the decision.

Basics of the Report Abstract

There are four main parts for your report.

- Purpose
- Methodology
- Results
- Conclusion

I cannot emphasize enough the importance of the opening section of the report. Once again, a lot of its tone will be determined by the audience that is going to be reading the report. If the signoff committee is familiar with the project, the introduction can be just a simple brief

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summary of the project. It may contain the talking points and requirements of the project. It should define what is needed, define what the problems are to be addressed, and define the solution that is desired.

The next section should be brief but outline the methodology as to how the information was gathered. Was this through demonstrations, meetings, reports, comparative analysis, running some live beta testing, or by talking with other firms using the same product being considered.

The results section is the meat of the report. Here you may have various analysis tools such comparative tables, linear analysis, pricing tables, financial analysis based on ROI, or product comparative analysis. This section may just be summary elements with various addendum documents at the report end such as price quotes, spreadsheets, or case studies that are referenced to in these summaries. This allows the committee member to go into more detail if they desire on this topic but remember, our goal of the abstract is to summarize and give analysis that can be read quickly and help delineate the decision process.

The conclusion is just that…...It ties everything together. Some abstracts don't have a conclusion as the committee may be judging more than one offering but you still may have an ending section that summarizes the result section for all the offerings.

Steps for writing an effective abstract

Analyze the audience for the abstract. Look at the main areas of the abstract and assemble the information for each section. Even though the abstract needs to be brief,

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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.

it should have the ability to substantiate the rationale behind your summaries or conclusions. Your logic should be coherent, concise and have the ability to stand on its own. You start by assembling all the information, reading over it and then writing your first rough draft.

Polishing the abstract

At this point, you have finished the rough draft. Sometimes it is helpful to just set it aside and come back later. First read the report to make sure it addresses the initial scope and goals you wish to accomplish. Read the report for content and make sure all information contained in it is correct and that your logical results are backed by the information found in the report. Drop any superfluous information and see if your report is too wordy or there is repetition. Look for any important information that has been left out. Obviously, correct any grammar or spelling errors. A good rule here is see if you can say the same thing with fewer words using bullet points, tables, graphs, etc. Use section titles to make it easy to skim or navigate to areas for review. Always remember, less can be more in a review for this committee.

We have helped many clients with their abstracts for approval

We have helped many clients assemble approval reports for their decision committee. This sometimes is as simple as providing cost analysis and ROI statements. We also sometimes provide a product comparative analysis which is a simple questionnaire of features allowing you to compare the ODTVision VRU to other offerings. Since implementation and customization is always a major issue, the ability to run our software in a "Test Mode" in your environment is a real plus as the client gets their hands on the solution and can start to see how customization is accomplished. Once we have eliminated all the questions and issues that a potential client has, it is easy for them to obtain approval and we can move to the next stage of design and implementation. Many times, this abstract is just a tool to help move the decision process forward.

Please feel free to contact us for assistance in documenting your needs, product features and decision process. ◘