

Site Visit Preparation Document

Preface Recommended Instructions

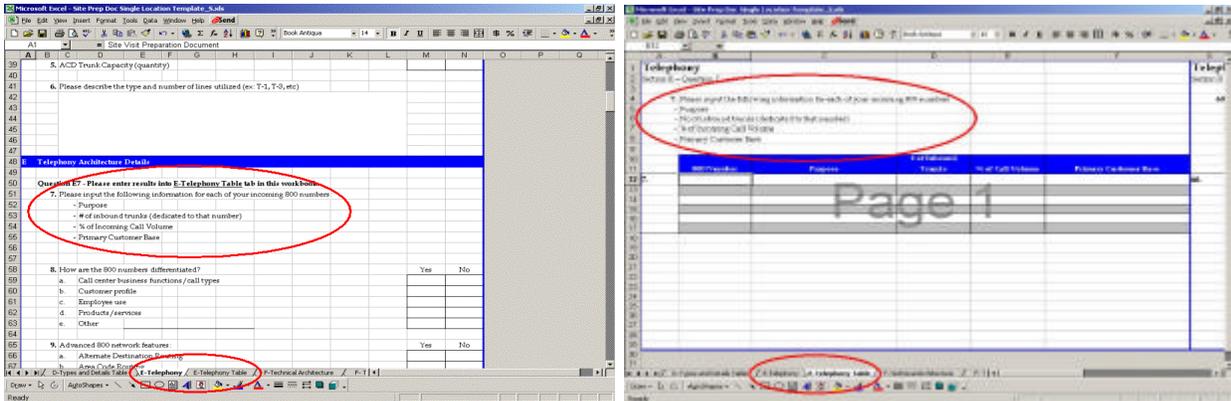
Thank you for participating in the Consistent Answers initiative. This Site Visit Preparation Document is the first in a series of steps to help SFA and the Modernization Partner better understand the details of the current working environment at all of the SFA call centers. In order to aid you in the process of completing the documentation, the Consistent Answers Team would like to recommend the following approach to completing the document in a timely and effective manner. Please use your best judgment to supply the appropriate resources to answer the following sections.

This document is meant to be filled out as a soft copy and has been designed accordingly. Although the document has been properly formatted to print in presentable pages, there can be some confusion to references between sections and the corresponding tables when viewing a hard copy. It is our recommendation to try and supply as many answers as possible while filling out the soft copy to allow for simple references between questions and their corresponding tables on separate tabs.

Example:
Question E7 -- Please enter the results into E-Telephony Table tab in this workbook.

7. Please input the following information for each of your incoming 800 numbers.
- Purpose
 - Number of inbound trunks (dedicated to that number)
 - Percent of Incoming Call Volume
 - Primary Customer Base

This information is to be filled in the corresponding table and not in the main section. If viewing a hardcopy version, the table may be several pages further back in the document. However, if filling out the information in the soft copy version, the corresponding tab is labeled directly after the E-Telephony section.



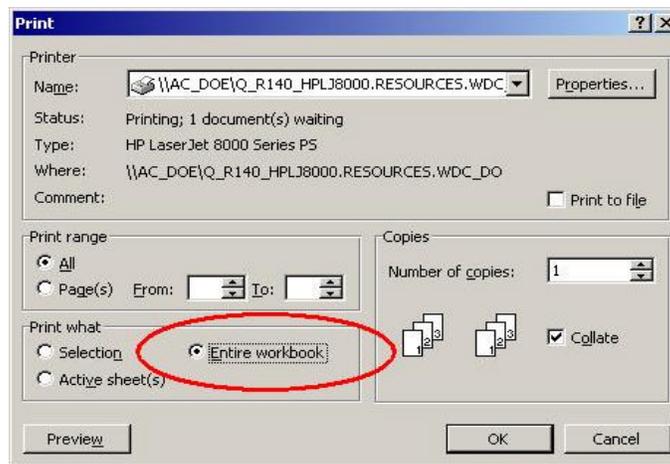
The following table presents an overview and the type of information requested in each section plus several of the possible recommended resources. Please use this table as a reference to help aid you in the delegation process for completing the document. If your call center does not have someone in this recommended position, please delegate to the best possible resource.

Letter	Section Title	Information Requested	Recommendation
A	Call Center General Information	Site Location, Call Center Purpose, KPIs, Best Practices	Call Center General Manager
B	Call Types and Details*	Call Types, Automation, Answering Times, Transfers	Call Center CSR / Team Leads
C	Staffing Levels*	CSR Groups, Staffing Volumes, CSR Scheduling	Call Center Manager or Human Resources
D	Volumes	Contact Volume by Media Channel, ACD / PBX Reporting Metrics	Call Center Manager
E	Telephony Architecture Details	ACD / PBX / IVR Specifications, Network Features, Trunk Allocation	Telephony Team Lead
F	Technical Architecture Details	Network Architecture, Desktop Applications, Hardware	Network Administrator

*Sections B and C require some coordination on information. In the beginning of Section B, there is an area to qualify the types of calls received by the call center. These call types will be also used in Section C. Please have the people completing the sections coordinate so that the information is consistent.

Additional Notes

- ◆ This is a Site Visit **Preparation** Document. This is intended to allow us to better understand the call center operations **before the subsequent Discovery Sessions**. If there is information that you do not have available, do not feel obligated to answer the question with inaccurate information. Please make the effort to fill out the information with the most quality information you have available to you. If some information is available, however it will take a longer time to process than the return date, please note this on the document and have the information available for the Discovery Session.
- ◆ Please assume that all data requested is for the timeframe of October 1, 1999 - March 31, 2001.
- ◆ Some of the sections will be used for the simulation of the enterprise environment, in order to properly simulate the current state, specific information on CSR scheduling and time processing will be critical to collect. Follow up discussions may be necessary to help design the proper model.
- ◆ To print a hardcopy of the document, make sure to select "entire workbook" as shown below.



Site Visit Preparation Document

Completed By:

Email Address:

Date:

A Call Center General Information

1. Call Center Name: **TEST** _____

2. Operating Partner: _____

3. Location(s):

4. Number of Physical Sites In Each Location:

5. Call Center Hours of Operation (all times EST):

	Location	Location
Monday	_____	_____
Tuesday	_____	_____
Wednesday	_____	_____
Thursday	_____	_____
Friday	_____	_____
Saturday	_____	_____
Sunday	_____	_____

6. Contact Channels:

Phone Number(s)

Email

Web

Fax

TDD

7. What is the purpose of the call center?

Site Visit Preparation Document

Completed By:

Email address:

Date:

B Call Types and Details

Please coordinate answers to Call Types with the person completing Section C Question 7. This information needs to be agreed upon and utilized by both groups to provide a complete picture of the call center functions.

1. Please review the "Call Types" from the IPT and make any updates to this list first.
2. For each call type, please review the Analysis done by the IPT and categorize the Call Type into one of the following buckets:
 - Change
 - Dispute
 - Question
 - Request
 - Status Check
 - Technical Questions
 - Transfer
 - Other

Make changes, as necessary.
3. Please provide the volume by type for the past 18 months from Oct. 1, 1999 - Mar. 31, 2001. If actual volumes are not available, please update the percentage of the total volume which is provided from the IPT information.

Call Types Given	Type Analysis	Volume	%
test	Status Check		28.70%
test	Change		27.50%
test	Question		19.30%
test	Question		5.30%
test	Change		5.20%
test	Transfer		5.10%
test	Question		3.00%
test	Question		2.90%
test	Change		1.90%
test	Question		1.00%
test	Other		0.00%
test	Other		0.00%

B Call Types and Details

Question B1 - Please enter results into B-Types and Details Table tab in this worksheet.

1. For the types given please answer the following:
 - a. Is the call type currently automated by IVR or Web and if so, at what percentage?
 - b. Is the call type going to be automated by IVR or Web and if so, at what percentage?

How long does the call type spend in each of the states listed states, according to the following parameters:

- %: Percentage of calls by type that go through this phase.
- Best Case Time: Shortest amount of time this phase would ever take (in seconds).
- Most Likely Time: Most frequently occurring, or normal, amount of time this phase would take (in seconds).
- Worst Case Time: Longest amount of time this phase would ever take (in seconds).

STATES

- c. **IVR Selection** (If an incoming call is directed to an IVR, how long does it spend here before going to self service or a CSR?)
- d. **IVR Self Service** (When a call is directed to IVR self-service, how long does it spend here to be self serviced by type?)
- e. **CSR w/ IVR input** (If a CSR knows some information about the incoming call, because it went through the IVR, how long does it take to service by type?)
- f. **CSR w/out IVR input** (If a call is "zeroed out" or sent to a CSR without any call type information, how long does it take to service by type?)
- g. What percentage of calls by type result in a transfer to another CSR or manager, and how much additional time is needed to complete such a call?
- h. What percentage of calls by type result in conferencing with another CSR or manager, and how much additional time is needed to complete such a call?
- i. What is the percentage of calls resolved on first contact by type?
- j. Please describe the process that a CSR goes through to handle each call type.

2. For misdirected calls, please describe the following:

- a. What percentage of calls do you receive that do not apply to your call center?

	%

b. Of these misdirected calls, what percentage do you handle by the following methods:

- "Warm transfer" to another call center
- "Cold transfer" to another call center
- Provide other call center contact information
- Do not know how to handle
- Other _____

	%

Total 100.00%

Call Types and Details

Section B -- Question 1

For the types given please answer the following

- a. Is the call type currently automated by IVR or Web and if so, at what percentage?
- b. Is the call type going to be automated by IVR or Web and if so, at what percentage?

		a		b		
Call Type		Volume / %	Current Automation		Planned Automation	
			% IVR	% Web	% IVR	% Web
1a-b.	Status Check	test	0.00%			
	Change	test	0.00%			
	Question	test	0.00%			
	Question	test	0.00%			
	Change	test	0.00%			
	Transfer	test	0.00%			
	Question	test	0.00%			
	Question	test	0.00%			
	Change	test	0.00%			
	Question	test	0.00%			
	Other	test	0.00%			
	Other	test	0.00%			

Call Types and Details

Section B -- Question 1

How long does the call type spend in each of the following states according to the following parameters:

- %: Percentage of calls by type that go through this phase
- Best Case Time: Shortest amount of time this phase would ever take (in seconds).
- Most Likely Time: Most frequently occurring, or normal, amount of time this phase would take (in seconds).
- Worst Case Time: Longest amount of time this phase would ever take (in seconds).

STATES

- c. **IVR Selection** (If an incoming call is directed to an IVR, how long does it spend here before going to self service or a CSR?)
- d. **IVR Self Service** (When a call is directed to IVR self-service, how long does it spend here to be self serviced by type?)
- e. **CSR w/ IVR input** (If a CSR knows some information about the incoming call, because it went through the IVR, how long does it take to service by type?)
- f. **CSR w/out IVR input** (If a call is "zeroed out" or sent to a CSR without any call type information, how long does it take to service by type?)
- g. What percentage of calls by type result in a transfer to another CSR or manager, and how much additional time is needed to complete such a call?
- h. What percentage of calls by type result in conferencing with another CSR or manager, and how much additional time is needed to complete such a call?

Call Type	test	c				d				e				f				g				h							
		IVR Selection				IVR Self Serve				CSR w/ IVR Input				CSR w/out IVR Input				Transferred Calls				Conferenced Calls							
		%	Best	Most	Worst	%	Best	Most	Worst	%	Best	Most	Worst	%	Best	Most	Worst	%	Best	Most	Worst	%	Best	Most	Worst				
1c-h. Status Check	test																												
Change	test																												
Question	test																												
Question	test																												
Change	test																												
Transfer	test																												
Question	test																												
Question	test																												
Change	test																												
Question	test																												
Other	test																												
Other	test																												

Call Types and Details

Section B -- Question 1

- i. What is the percentage of calls resolved on first contact by type?
- j. Please describe the process that a CSR goes through to handle each call type.

		i	j
Call Type		% resolved on first contact	CSR Processing Steps
11-j.	Status Check	test	
	Change	test	
	Question	test	
	Question	test	
	Change	test	
	Transfer	test	
	Question	test	
	Question	test	
	Change	test	
	Question	test	
	Other	test	
	Other	test	

Site Visit Preparation Document

Completed By: _____

Email Address: _____

Date: _____

C Staffing Levels

<p>1. Total number of call center related employees: *Include all administrative and support employees.</p>	# <input style="width: 100%; height: 20px;" type="text"/>																				
<p>2. Total number of seats in the call center:</p>	# <input style="width: 100%; height: 20px;" type="text"/>																				
<p>3. Average Customer Service Representative (CSR) absenteeism rate (percentage) between Oct. 1, 1999 - Mar. 31, 2001:</p>	% <input style="width: 100%; height: 20px;" type="text"/>																				
<p>4. Supervisor to CSR ratio (e.g. 1 to 15):</p>	Ratio <input style="width: 100%; height: 20px;" type="text"/>																				
<p>5. What are the CSR segmentation criteria?</p> <ul style="list-style-type: none"> a. Business Function b. Customer Segment c. Demographics d. Geography e. Interaction Type f. Product/Service g. Language/Dialect h. Training/Level i. Other _____ 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Yes</th> <th style="width: 50%;">No</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> </tbody> </table>	Yes	No																		
Yes	No																				
<p>6. How is CSR segmentation implemented?</p> <ul style="list-style-type: none"> a. Dialed Number Identification Service (DNIS) b. Call Prompt c. Interactive Voice Response (IVR) d. Live Operator 	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 50%;">Yes</th> <th style="width: 50%;">No</th> </tr> </thead> <tbody> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> <tr><td> </td><td> </td></tr> </tbody> </table>	Yes	No																		
Yes	No																				

Question C7 - Please enter results into C-CSR Groups Table tab in this workbook.

7. Please answer the following questions for each CSR group/segmentation. If CSRs are not grouped or segmented, please answer the questions for the entire group.

- a. CSR Group Name.
- b. Number of CSRs in Group.
- c. Define Call Types handled by each group.

NOTE: Call Types used in Section C should correspond with Call Types used in Section B.

- d. Describe the priority given to each call type for the group.
- e. Define the percentage transferred by each CSR group by call type (both internal and external to the call center).
- f. Define the transferred destination group.
- g. Define the percentage conferenced by each CSR group by call type (both internal and external to the call center).
- h. Define the conferenced destination group.
- i. Describe the schedule for each CSR group including:
 - Times for - shift start and end, lunch start and end, and break start and end
 - Please indicate any differences between lunch and break schedules for the CSRs in the group (e.g. staggered schedules where 50% of the CSRs take lunch from 11:30 to 12:00 and 50% take lunch from 12:00 to 1:00).
 - Does the schedule differ from day to day? If so, how?
 - Estimated time per day a CSR takes calls.
- j. What are the CSRs' non-call-handling activities?
 - By activity, include the approximate number of hours a CSR spends performing these tasks on a daily or weekly basis.
 - The duration of the activity (e.g. reviewing applications for 10 hours a week/each application takes 5 minutes to review)
 - How are these activities scheduled?
- k. What is the nature of CSRs **outbound** dialing duties (if any)?

B Staffing Levels

8. Does the call center provide Spanish-speaking CSRs?

Yes	No

9. If Spanish-speaking CSRs are provided, when are they available?

10. How many Spanish speaking CSRs are provided during each shift?

11. Are Spanish-speaking customers routed to a different queue?

Yes	No

12. Are other languages ever required by customers?

Yes	No

13. If yes, what are the languages and how are the calls handled?

14. Are the call center's CSRs devoted to SFA calls exclusively?

Yes	No

15. If no, what percentage of time is spent with calls from non-SFA clients?

%

Question C16 - Please enter results into C-Staffing Table tab in this workbook.

16. For the different categories of employees, give the monthly staffing levels.

CSR Grouping

Section C -- Question 7

7. Please answer the following questions for each CSR group/segmentation. If CSRs are not grouped or segmented, please answer the questions for the entire group.

- a. CSR Group Name.
- b. Number of CSRs in Group.
- c. Define Call Types handled by each group.

NOTE: Call Types used in Section C should correspond with Call Types used in Section B.

- d. Describe the priority given to each call type for the group.
- e. Define the percentage transferred by each CSR group by call type (both internal and external to the call center).
- f. Define the transferred destination group.
- g. Define the percentage conferenced by each CSR group by call type (both internal and external to the call center).
- h. Define the conferenced destination group.

	a	b	c	d	e	f	g	h		
	CSR Group	# of CSRs	Call Types Handled	Describe the priority given to each call type in this CSR group.	% Transferred Internally	% Transferred Externally	Destination Group	% Conferenced Internally	% Conferenced Externally	Destination Group
7a-h.										

CSR Grouping

Section C -- Question 7

- i. Describe the schedule for each CSR group including:
 - Times for - shift start and end, lunch start and end, and break start and end
 - Please indicate any differences between lunch and break schedules for the CSRs in the group
(e.g. staggered schedules where 50% of the CSRs take lunch from 11:30 to 12:00 and 50% take lunch from 12:00 to 1:00).
 - Does the schedule differ from day to day? If so, how?
 - Estimated time per day a CSR takes calls.
- j. What are the CSRs' non-call-handling activities?
 - By activity, include the approximate number of hours a CSR spends performing these tasks on a daily or weekly basis.
 - The duration of the activity (e.g. reviewing applications for 10 hours a week/each application takes 5 minutes to review).
 - How are these activities scheduled?
- k. What is the nature of CSRs **outbound** dialing duties (if any)?

	a	i	j	k
	CSR Group	Schedules	Non-call-handling functions	Outbound dialing duties
7 i-k.	0			
	0			
	0			

Staffing

Section C -- Question 16

16. For the different categories of employees, give the monthly staffing levels.

	Month	Mgmt	Clerical Support	Mailroom	Tech Support	Categories of Inbound Call Handling Employees					Other
						Full-time	Part-time	Flex-time	Seasonal	Contract	
16.	October 1999										
	November 1999										
	December 1999										
	January 2000										
	February 2000										
	March 2000										
	April 2000										
	May 2000										
	June 2000										
	July 2000										
	August 2000										
	September 2000										
	October 2000										
	November 2000										
	December 2000										
	January 2001										
	February 2001										
March 2001											

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Completed By:

Email Address:

Date:

D Volumes

Question D1 and D2 - Please enter results into **D-Volumes Table** tab in this workbook.

1. Please provide information on the volume of inquiries (for all contact channels) received into your call center, using the matrix format for the period Oct 1, 1999 – Mar 31, 2001.
 - a. Contact Volumes Received by Channel
 - b. Metrics

2. What are the expectations for growth in volume over the next two years (percentage)?

3. Complete the questions regarding written correspondence/mail (NOT email) processing using information from the highest volume month and lowest volume month from the table for D1

- a. Average number of pieces received per day
- b. Average number of pieces processed per day
- c. Average daily backlog

High Volume Month Low Volume Month

High Volume Month	Low Volume Month

4. For written correspondence / mail (NOT email) please describe the following:

- a. Mail imaging process:

- b. Counting controls:

- c. Quality Assurance methodologies:

- d. Post-Processing Disposition (e.g. stored onsite, offsite, destroyed, etc.):

Volumes

Section D -- Question 1

1. Please provide information on the volume of inquiries (for all contact channels) received into your call center, using the matrix format for the period Oct 1, 1999 – Mar 31, 2001.
 - a. Contact Volumes Received by Channel
2. What are the expectations for growth in volume over the next two years (percentage)?

	Month	Contact Volume Received by Channel					Outbound Calls	
		Phone	e-mail	Written Correspondence ¹	Fax	Web Informational ²		Web Transactional ³
1a.	October 1999							
	November 1999							
	December 1999							
	January 2000							
	February 2000							
	March 2000							
	April 2000							
	May 2000							
	June 2000							
	July 2000							
	August 2000							
	September 2000							
	October 2000							
	November 2000							
	December 2000							
	January 2001							
	February 2001							
	March 2001							
	TOTALS	0	0	0	0	0	0	0
2	Expected Growth %							

¹ Standard mail or delivery service (USPS, FedEx, UPS, etc.).

² Website hits when contact is for finding information only.

³ Website hits when contact is for conducting a transaction or sending information.

Volumes

Section D -- Question 1

1. Please provide information on the volume of inquiries (for all contact channels) received into your call center, using the matrix format for the period Oct 1, 1999 – Mar 31, 2001.
 - b. Metrics

	Month	Calls Received ¹	Calls Blocked ²	Calls Abandoned ³	Calls Answered ⁴	Average Speed of Answer ⁵	Average Talk Time ⁶	Average Wrap-up Time ⁷	Average Time in Queue ⁸
1b.	October 1999								
	November 1999								
	December 1999								
	January 2000								
	February 2000								
	March 2000								
	April 2000								
	May 2000								
	June 2000								
	July 2000								
	August 2000								
	September 2000								
	October 2000								
	November 2000								
	December 2000								
	January 2001								
	February 2001								
	March 2001								
	TOTALS	0	0	0	0	0	0	0	0

¹ Calls entering the PBX.

² Calls which are stopped before entering the call center's network.

³ Call that has been offered into a communications network or telephone system but is terminated by the person originating the call before any conversation happens.

⁴ Number of calls offered into the communications network which are accepted into the call center and answered by a live voice.

⁵ Average wait in queue experienced by all callers to an ACD group during a specified period. It includes both calls delayed and those answered immediately in the calculation (in seconds).

⁶ Average elapsed time from when an agent answers a call until the agent disconnects (in seconds).

⁷ Average time required by an agent after a conversation is ended to complete work that is directly associated with the calls just completed. The calculation does not include other activities such as meetings, breaks, correspondence, etc. (in seconds).

⁸ Average time a call waits in the queue after selecting to speak to an agent but before an agent answers (in seconds).

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Completed By:

Email Address:

Date:

E Telephony Architecture Details

System and Network Environment

1. Indicate what type of call center systems are used and the Technical Information (e.g. Vendors, Application, Version, Platform).

	Yes	No	Technical Information
a. 3270 Terminals			_____
b. Call Management System			_____
c. Call-Back Messaging			_____
d. Client Server			_____
e. Computer Telephony Integration (CTI)			_____
f. Dynamic Inbound/Outbound Calling			_____
g. Imaging System			_____
h. Integrated Performance Support / AI Systems			_____
i. Monitoring/Recording System			_____
j. Multimedia System			_____
k. Predictive Dialing			_____
l. Remote CSRs / Telecommuting			_____
m. Speech Recognition			_____
n. Staff Forecasting Tools			_____
o. Teleservicing Software			_____
p. Voice Messaging			_____
q. Voice Response			_____
r. Workstations / LANs			_____
s. Fax from Desk			_____
t. Internet Access			_____
u. Other _____			_____

2. What other technology initiatives are planned or being considered for the call center?

3. Inbound Trunks (quantity):

4. Outbound Trunks (quantity):

5. ACD Trunk Capacity (quantity):

In Use	Max Capacity

6. Please describe the type and number of lines utilized (e.g. T-1, T-3, etc.).

E Telephony Architecture Details

Question E7 - Please enter results into E-Telephony Table tab in this workbook.

7. Please input the following information for each of your incoming 800 numbers:

- Purpose
- Number of inbound trunks (dedicated to that number)
- Percentage of Incoming Call Volume
- Primary Customer Base

8. How are the 800 numbers differentiated?

- a. Call center business functions/call types
- b. Customer profile
- c. Employee use
- d. Products/services
- e. Other _____

Yes	No

9. Are any of the following advanced 800 network features available?

- a. Alternate Destination Routing
- b. Area Code Routing
- c. Automatic Number Identification (ANI)
- d. Call Allocation (Static Routing)
- e. Call Overflow Handling
- f. Contingency/Emergency Routing
- g. Customized Network Reporting
- h. Day of Week Routing
- i. Dialed Number Identification Service (DNIS)
- j. Exchange Routing
- k. Time of Day Routing

Yes	No

10. Network-based voice processing functions:

- a. Automatic Call Distribution
- b. Call Prompting
- c. Voice Messaging
- d. Voice Response
- e. Other _____

Yes	No

11. If no CSRs are available (e.g. After Hours, Holidays), how are calls handled?

12. At any time are calls terminated from the system or queue? If yes, when?

13. Do you use DNIS? If so, how is it used and how is it defined?

14. Do you use ANI? If so, how is it used and how is it defined?

E Telephony Architecture Details

ACD / PBX General Information

15. ACD / PBX Manufacturer: _____

16. Model / Version: _____

17. Type of Product:

	Yes	No
a. CO-Based ACD (Centrex)		
b. Integrated ACD / PBX		
c. Network based (LD carrier)		
d. PC-Controlled programmable switch		
e. Stand-alone ACD		
f. Is the product purchased, leased, or handled by a service provider?		
g. If leased or service provider, when is the agreement's end date?		

18. Quantity Installed:

19. Date(s) of Installation: _____

20. Location(s) of Installation: _____

21. Intra-Call Center Features:

	Yes	No
a. Delay announcements with Anticipated Wait Time		
b. Delay announcements without Anticipated Wait Time		
c. Queue to Multiple CSR Groups		
d. Retained Queue Position		
e. System Intraflow		
f. Wall Board Displays		

22. Call Processing Features:

	Yes	No
a. Abandoned Call Capture		
b. Caller Identification		
c. CSR Availability		
d. Dialed Number Identification		
e. Music on Delay		
f. Night Service		
g. Prioritization of trunk groups		
h. Queue Length		
i. Skilled CSR Attributes		
j. Time of Day/Day of Week		

23. Multiple Networked ACDs:

	Yes	No
a. Centralized Queue Management		
b. Centralized Reporting		
c. Centralized Systems Management		
d. System Interflow/Overflow		

24. System Reporting Features:

	Yes	No
a. CSR Performance		
b. Exception Reporting		
c. Graphical Reporting		
d. Multi-site Network Activity		
e. Staff/Forecasting		
f. System Activity		
g. System Diagnostics/Trouble		
h. Trunk Utilization		

25. On-line Information Tracking:

	Yes	No
a. Call Types		
b. Call Types by Customer		
c. Complaints/Problem Resolution Status		
d. Customer Satisfaction		
e. Customer/Account history		
f. On-time Delivery of Products/Services		
g. Time to Resolution		
h. Other _____		

26. Disaster Recovery:

	Yes	No
a. Backup Call Center Location		
b. Backup System		
c. Disaster Recovery Service Provider		
d. Redundant Central Processor		

E Telephony Architecture Details

IVR Technologies

- 27. IVR Manufacturer / Model: _____
- 28. Software Version: _____
- 29. Date(s) of Installation: _____
- 30. Location(s) of Installation: _____

31. System Environment:	Organization/Provider	Yes	No
a. In-house		<input type="checkbox"/>	<input type="checkbox"/>
b. Network-based	_____	<input type="checkbox"/>	<input type="checkbox"/>
c. Outsourced	_____	<input type="checkbox"/>	<input type="checkbox"/>
d. If network or outsourced, when is the agreement's end date?	_____		

32. Interface Methods:	Yes	No
a. Behind the PBX/ACD (PBX Extensions)	<input type="checkbox"/>	<input type="checkbox"/>
b. Direct connect to network	<input type="checkbox"/>	<input type="checkbox"/>

33. System Functionality:	Yes	No
a. After Hours	<input type="checkbox"/>	<input type="checkbox"/>
b. Call Prompting/Automated Attendant	<input type="checkbox"/>	<input type="checkbox"/>
c. Contingency	<input type="checkbox"/>	<input type="checkbox"/>
d. Overflow	<input type="checkbox"/>	<input type="checkbox"/>
e. Other _____		

34. Number of Systems / Ports in Use: #

35. System Port Capacity: #

36. Database Integration/ Host Communications:	Yes	No
a. Ethernet LAN	<input type="checkbox"/>	<input type="checkbox"/>
b. HTML / HTTPS	<input type="checkbox"/>	<input type="checkbox"/>
c. IBM 3270/74 terminal emulation	<input type="checkbox"/>	<input type="checkbox"/>
d. IBM 5250/51 terminal emulation	<input type="checkbox"/>	<input type="checkbox"/>
e. JDBC	<input type="checkbox"/>	<input type="checkbox"/>
f. Microsoft LAN Manager connectivity	<input type="checkbox"/>	<input type="checkbox"/>
g. Novell NetWare LAN connectivity	<input type="checkbox"/>	<input type="checkbox"/>
h. Single or multiple host access	<input type="checkbox"/>	<input type="checkbox"/>
i. SNMP Monitoring	<input type="checkbox"/>	<input type="checkbox"/>
j. TCP/IP	<input type="checkbox"/>	<input type="checkbox"/>
k. Token Ring LAN	<input type="checkbox"/>	<input type="checkbox"/>
l. TTY / TDD terminal emulation	<input type="checkbox"/>	<input type="checkbox"/>
m. VT100/200 terminal emulation	<input type="checkbox"/>	<input type="checkbox"/>
n. X.25	<input type="checkbox"/>	<input type="checkbox"/>
o. XML / Voice XML	<input type="checkbox"/>	<input type="checkbox"/>

37. IVR input methods:	Yes	No
a. Directed Dialog Speech Recognition	<input type="checkbox"/>	<input type="checkbox"/>
b. Natural Language Speech Recognition	<input type="checkbox"/>	<input type="checkbox"/>
c. Pulse to Tone Conversion	<input type="checkbox"/>	<input type="checkbox"/>
d. Remote PC Access	<input type="checkbox"/>	<input type="checkbox"/>
e. Speaker Identification	<input type="checkbox"/>	<input type="checkbox"/>
f. Speaker Verification	<input type="checkbox"/>	<input type="checkbox"/>
g. Touchtone Keypad	<input type="checkbox"/>	<input type="checkbox"/>

E Telephony Architecture Details

38. IVR system features:

	Vendor	Yes	No
a. Applications Generator	_____		
b. Broadcast Messages	_____		
c. Callback Messaging	_____		
d. CTI Interface	_____		
e. Fax Response	_____		
f. Multi-lingual	_____		
g. Natural Text to Speech	_____		
h. TDD / TTY	_____		
i. Text-to-Speech	_____		
j. Voice Forms/Messaging	_____		

39. IVR system reporting features:

		Yes	No
a. Account Activity			
b. Call Volumes			
c. Exception Reporting			
d. Service Levels			
e. System Activity			
f. Trunk Utilization			
g. Other _____			

40. What other IVR initiatives are planned or being considered for the call center?

41. What is the development tool utilized to make IVR changes?

42. Development environment:

	Organization/Provider	Yes	No
a. Internal			
b. Third-party	_____		
c. Vendor	_____		

E Telephony Architecture Details

CTI Technologies

43. CTI Link Product: _____

44. Version: _____

45. Architecture:

	Yes	No
a. PBX-Host interface		
b. PBX-LAN server interface		
c. Telephone station-PC interface (Desktop)		

46. Nature of Integration:

	Yes	No
a. One-way interface		
b. Two-way interface		

47. Date and Location of Installation(s):

48. CTI Application Environment:

	Yes	No
a. Call center		
b. Departmental / Workgroup		

49. Benefits realized from CTI Implementation:

50. CTI Features/Functionality:

	Yes	No
a. Abandoned call tracking for callback		
b. ACD / Workstation integrated logon		
c. Call / Screen synchronization ("Screen Pops")		
d. Callback messaging		
e. Call-only transfer between Call Center locations		
f. Consultation/conference		
g. Coordinated call/screen transfer		
h. Intelligent routing		
i. Call data transfer		

51. IVR-based Caller Identification:

	Yes	No
a. Account Number		
b. Social Security Number		
c. Personal Identification Number		
d. Other _____		

52. What type of verification is required? By CSR? By system?

53. What percentage breakdown by time of day are calls accurately identified via ANI?

	%
a. 8AM - 5PM (M-F)	
b. 5PM - 8AM (M-F)	
c. Weekends	

54. Development Environment: _____ Organization/Provider

	Yes	No
a. Internal CTI Expert		
b. Vendor _____		
c. Third-party Developer _____		

E Telephony Architecture Details

Maintenance

55. Maintenance Providers: Organization/Provider
- a. In-House Personnel _____
 - b. Outsource Agreement _____
 - c. Sub-Contractors _____
 - d. Vendor Services (In-house) _____
 - e. Vendor Services (On call) _____
 - f. Other _____

Yes	No

56. Percent of Total Maintenance Support:
- a. In-House Personnel _____
 - b. Outsource Agreement _____
 - c. Sub-Contractors _____
 - d. Vendor Services (In-house) _____
 - e. Vendor Services (On call) _____
 - f. Other _____

%

Total 100%

57. Level of satisfaction with current maintenance operations:

58. When and how is preventive maintenance handled?

59. When and how is scheduled downtime handled?

Question E60 - Please enter results into E-Telephony Table tab in this workbook.

60. Please input the following information used when defining your maintenance level problem classes:
- Level Name (e.g. Level 1)
 - Definition (e.g. Critical effect to all CSRs)
 - Time to Repair (e.g. Fix in 30 minutes or less)

61. Frequency of Release Updates: _____

Telephony

Section E -- Question 7

7. Please input the following information for each of your incoming 800 numbers

- Purpose
- Number of inbound trunks (dedicated to that number)
- Percentage of Incoming Call Volume
- Primary Customer Base

	800 Number	Purpose	# of Inbound Trunks	% of Call Volume	Primary Customer Base
7.					

Telephony

Section E -- Question 60

60. Please input the following information used when defining your maintenance level problem classes

- Level Name (e.g. Level 1)
- Definition (e.g. Critical effect to all CSRs)
- Time to Repair (e.g. Fix in 30 minutes or less)

	Level Name	Definition	Time to Repair
60.			

Technical Architecture

Section F -- Questions 9 and 10

9. Please input the following information for each of your applications.

- Application Name / Version
- Function
- Number of Seats / Licenses
- Personnel who use it (e.g. CSR, Team Lead, Manager)?

10. Please input the following information for each piece of hardware.

- Vendor Name / Version
- Model
- Processor/Speed, Memory, Hard Drive (if any), Capacity
- Number of Pieces
- Personnel who use it (e.g. CSR, Team Lead, Manager)?

	Application Name / Version	Function	# of Seats / Licenses	Personnel
9.				

	Vendor	Model	Processor, Speed, Memory, Drive, Capacity	Hard	# of Pieces	Personnel
10.						

Additional Documents Needed for the Site Visits and Evaluations:

In an effort to fully understand the call center operations, we would appreciate your including the following statistical information and documentation. Please provide information relating to the SFA functions performed by the call center. Provide this information in electronic format with this questionnaire. If electronic versions of this documentation does not exist, please provide hard copies during the onsite visits.

Section A - Call Center General Information

*** Call Center Performance Reports**

Section B - Call Types and Details

Call Center Process Flows

Training Documentation and Job Aids

CSR Prompts/Scripts

Section C - Staffing

CSR Job Descriptions

- Include Skill Sets for CSRs

Organization Chart

- Include Numbers of Resources at Levels
- Show the reporting levels between the CSRs up to the head of the call center operations then to the CEO or equivalent

Section D - Volumes

*** ACD-PBX Reports** which include:

Daily Inbound Calls

- | | |
|---------------------------|---------------------|
| - By Type | - Average Talk Time |
| - By Half-hour Increments | - Wrap-Up Time |
| - Calls Abandoned | - Time in Queue |
| - Average Speed of Answer | |

Section E - Telephony

Call Flows and Call Trees (IVR Scripts)

- Include messages types and texts
- Identify the boundaries of the network, central office, and the call centers walls

*** IVR Reports**

Section F - Technical Architecture

Desktop Application List

- One for CSRs and one for Supervisors/Team Leads
- Include applications and versions
- Function of each application
- Number of stations with each configuration

Technical Architecture Diagrams

*** Provide Daily and Monthly Reports:**

- Daily Reports should be provided for each day in March 2001
- Monthly reports should reflect the 18 month period from Oct. 1, '99 - March 31, '01