



Student Financial Assistance

Consistent Answers Central IVR Team Conceptual Designs

October 10, 2001



Overview

Interim Improvements

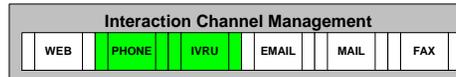
- ◆ **Evaluation:** Defer until enterprise initiative can be in place

Consistent Answers Phase I

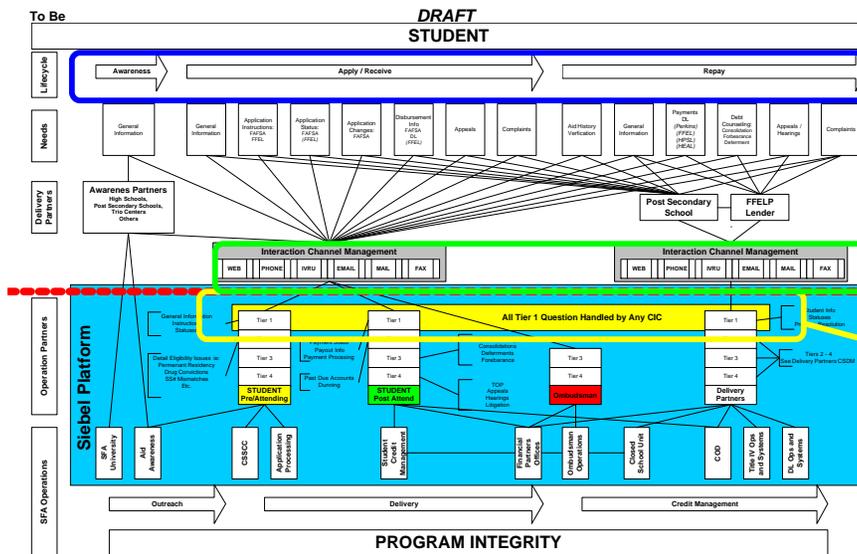
- ◆ **Status:** Completed conceptual design for Student IVR and overview for Delivery Partners IVR
- ◆ **Next Steps:** Incorporate eCRM (eServicing) and COD efforts and establish implementation plan

Stage IV – Enterprise Communication Management

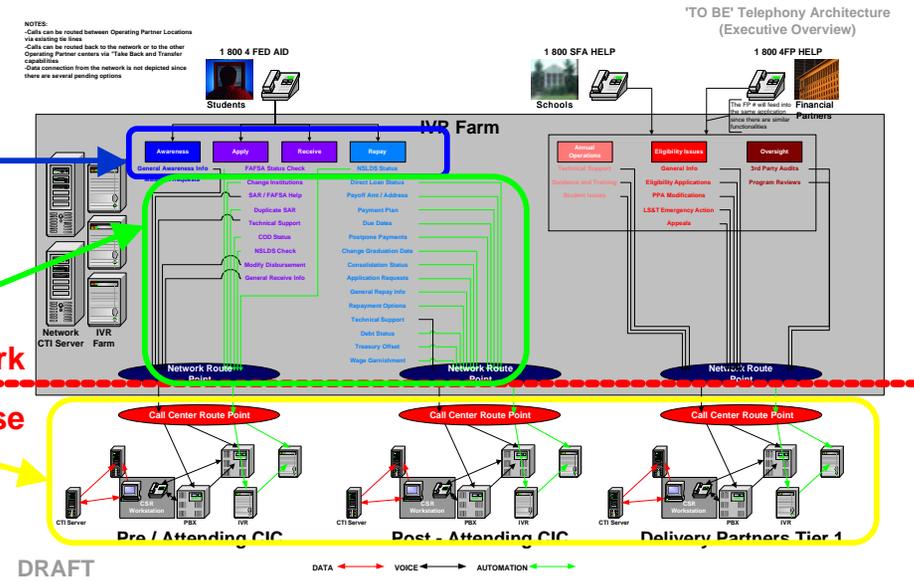
Telephony in the CSDM



CSDM Students Model



Student IVR



Stage IV – Enterprise Communication Management

Starting Constraints and Assumptions



Modernization Dependencies and Assumptions

- ◆ EAI needs to be completed
- ◆ Single Customer (Student, School, FP) Identifier and PIN needs to be addressed
- ◆ eServicing / COD need to be finished
- ◆ Migration plan needs to be in place

Consistent Answers Dependencies and Assumptions

- ◆ Contract Implications and Alignment need to be completed
- ◆ Shared In Savings Deal needs to be in place
- ◆ Team Resources need to be available

Stage IV – Enterprise Communication Management

High Level Impacts



Operating Rules

- ◆ eServicing / COD Migration
- ◆ IVR automation centralization

Business Rules

- ◆ Centralized Reporting
- ◆ Virtual Call Centers

Organization / Human Performance

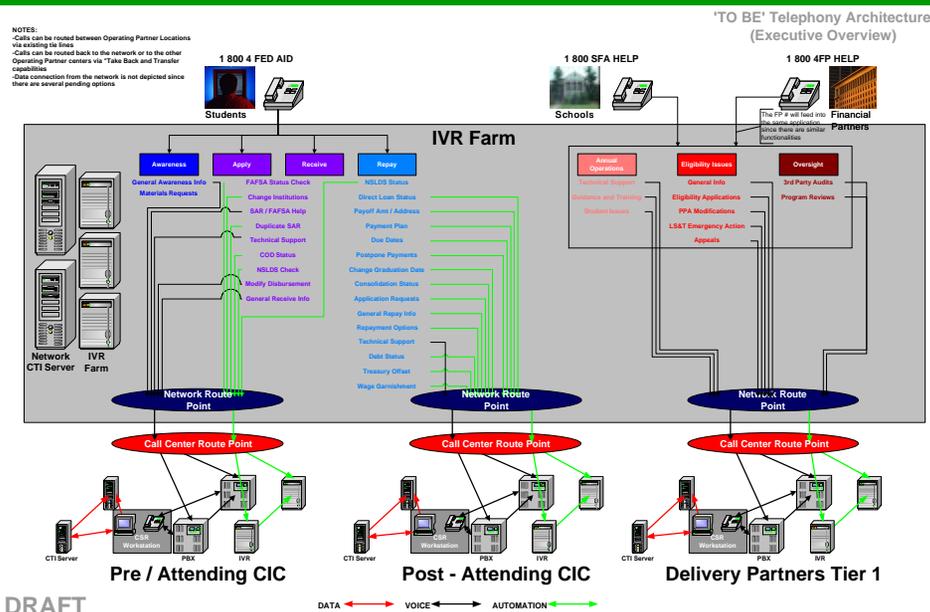
- ◆ Customer Awareness
- ◆ Operations Support

Infrastructure

- ◆ MCI network routing
- ◆ Genesys Enterprise Solution
- ◆ Centralized data access through EAI



Executive Overview Figure



Depicts high level technical architecture

- ◆ Routing of calls will be handled in the “cloud”
- ◆ Combination of existing and new technologies will be utilized for automation
- ◆ Call center independent (all virtual)
- ◆ Automated functionality will begin to migrate away from Operating Partners

Depicts high level functional architecture

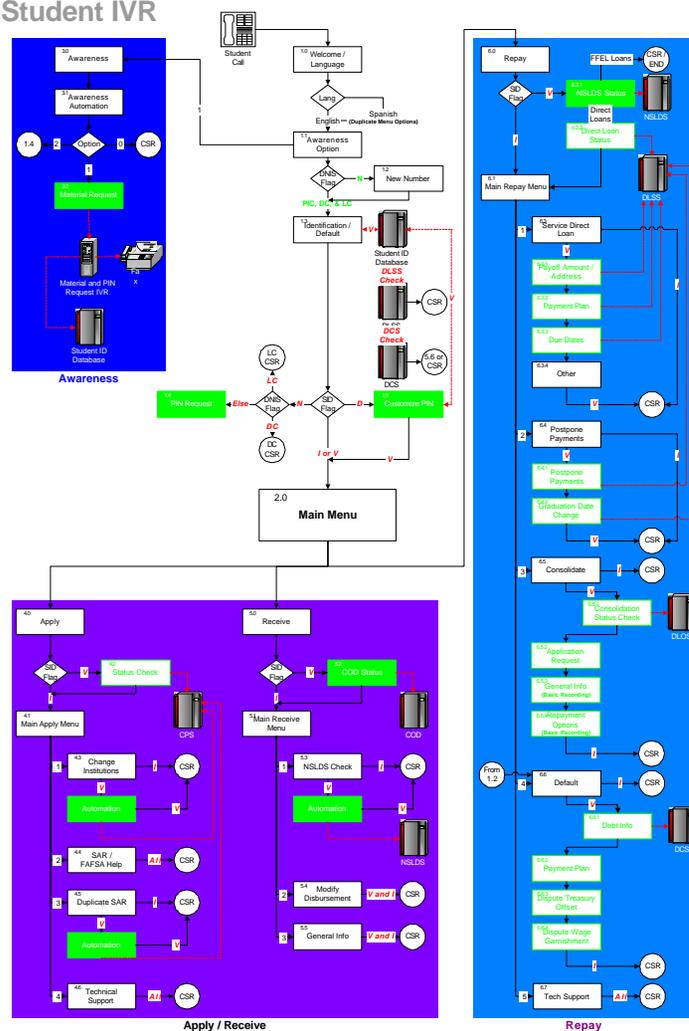
- ◆ Students calls are grouped by lifecycle
- ◆ Delivery Partners calls are grouped by CSDM functionality
- ◆ Automated functionality will increase with common data access and streamlined call flows



Students IVR Figure

- ◆ Callers are in “Awareness”, “Apply / Receive”, or “Repay” phase of lifecycle
- ◆ Try to identify caller through Single Student Id and PIN
- ◆ Push information to student before they ask (ex: Status Checks)
- ◆ Incorporate existing automated functionality
- ◆ Develop new automated functionality

Student IVR





Delivery Partners IVR Figure

- ◆ Details will be determined once the entire CSDM operating model is defined
- ◆ Calls are routed according to CSDM business functionality
- ◆ Try to identify caller through Single School Identifier
- ◆ Route calls to Tier 1 and then to more specific groups as needed
- ◆ Develop new automated functionality

Delivery Partners IVR

