



*Integrating Voice and Data
for Call Center Excellence*

The CTI Discovery Objective

The objective of a CTI discovery is to clearly understand and document the technology, business issues, resources and steps required to undertake a CTI project and achieve success. The essential areas evaluated in the discovery are:

- ◆ The current enterprise telephone and computer technology platforms.
- ◆ The culture, operation, and objectives of the call center.
- ◆ The expected impact on your customers.

At the completion of the CTI Discovery, Logical Software submits a 'CTI Discovery Report' detailing our findings and outlining recommendations. This provides your team with information to clearly define the scope for a CTI project including the technology requirements, costs and duration, expected results and benefits and calculation of an accurate ROI.

The CTI Discovery Process

The Discovery process consists of three steps. These are:

Pre - Discovery Data Collection:

To minimize the cost of the 'Discovery' process and disruptions to your staff's daily work routines we recommend you provide us with initial background information in writing. We will provide the topics and headings outlining the information required. Typically, your project team would provide information on the following areas.

- ◆ Enterprise Information Systems and Networks
- ◆ Telephone Systems and infrastructure
- ◆ Call center Operations & Support
- ◆ Business Culture and operations

When this information is returned to us, we will then proceed with the next step in the Discovery process. Should you prefer we could visit your site to gather this information. An estimate of costs for this will be provided upon request.

On-Site Investigation:

The on-site investigation involves meetings with your CTI project team, other staff involved in the project, and observing operations in your call center. To ensure we obtain a complete understanding of your company, operations, and practices we will usually hold discussions with representatives from the following groups.

- ◆ Business/Marketing group
- ◆ Call Centre Management group
- ◆ Telecom Management group
- ◆ Information System group
- ◆ Help Desk/Technical Support group
- ◆ Call Center Training Staff

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Specifically we would have discussions with the following managers:

- ◆ Senior call center Managers/Supervisors
- ◆ Chief Information Manager, IT Manager or IS Manager
- ◆ Managers directly responsible for the enterprise telephone systems

The objectives of these discussions are to collect information in order to understand:

The culture of the your call centre including;

Staffing, agent groups, responsibilities, practices, processes, data flow, operating challenges, limitations, QA & roll out practices, in-house technical support structure, training practices, business/special events, changes, freeze periods, etc.

The current Enterprise Information System implementation including;

LAN/WAN architecture, agent and supervisor applications, supporting servers, mainframe/legacy systems, enterprise databases, CRM software, systems architecture, etc.

The current telecommunications infrastructure and equipment including;

PBX, ACD, telephone systems, trunk lines, calling patterns, growth requirements, etc.

The current implementation of any CTI components including;

IVR, Dialer, Web, CTI components being used, etc.

Your customer's short and long-term service needs, calling patterns, etc.

The discovery investigation typically takes 5 – 10 days depending upon the scope and size of the call center operation and the CTI objectives to be achieved. An estimated time for this step is included in the "Discovery Quotation" but this time is flexible. It can change depending upon the conditions encountered on site and the need to schedule discussions with your personnel.

Discovery Report:

Within two to four weeks after completing the on-site investigation we will deliver a 'Discovery Report' summarizing our findings and recommendations. The report will focus on providing:

- ◆ Accurate data to assist Project Managers in creating a viable business case(s) for call centre related projects (i.e. Dialer, Web enabled call centre, CTI, etc.)
- ◆ Recommendations on specific technologies that can be implemented to meet CTI objectives, improve customer's satisfaction, and increase call centre efficiency.
- ◆ Recommendations on selecting CTI and call center products together with a high-level rollout plan (deliverable for each project phase).

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These recommendations will be supported in the report by a summary of:

- ◆ The existing computer environment; (i.e. hardware platforms, operating systems, LAN / WAN architecture, servers, desktops, database, software applications, etc.)
- ◆ The existing telephony environment; (i.e. PBX, trunks, lines, IVR, Dialer, CTI, etc.)
- ◆ The existing call centre culture; (staffing, agent groups, responsibilities, practices, processes, data flow, outstanding challenges, limitations, QA & roll out practices, in-house tech support structure, training practices, business / special events, changes freeze periods, etc.)
- ◆ The enterprise's short and long-term CTI and customer service requirements.

Going Forward

The Logical Software CTI Discovery becomes the blueprint for defining and carrying out the CTI project. This significantly increases the probability of achieving your project objectives.

The Customer may choose to use Logical Software's CTI Discovery to:

- ◆ Proceed with the CTI project with their own IT team.
- ◆ Partner with Logical Software to assist their IT team to proceed with the project.
- ◆ Contract with Logical Software to manage the complete project.
- ◆ Create an RFP requesting further input from qualified vendors.

Whatever option is selected our customers are secure in the knowledge that Logical's CTI Discovery has provided the information necessary to fully understand the CTI project requirements and carry it out to achieve their customer service objectives and the required ROI.

Our Vision

Logical Software provides industry expertise, applications and development tools that reduces the implementation risk, time and costs for CTI projects. Our solutions improve our customers' business services while maximizing the use of their existing telephony infrastructures. To each of our clients we bring a high level of professionalism, an in-depth understanding of telecommunications technology and call center operations, and the business practices necessary for achieving customer service excellence.

“Logical Software has acquired the highest respect within Saskatchewan Telecommunications in terms of your knowledge of the various systems and applications that we utilize and your understanding as to how technology should support the needs of our business.”

Brian L. Walker, CTI Project Manager
SaskTel, Regina, Saskatchewan