

Presence Voice

Introduction

This document describes the architecture and features of the voice module of Presence Voice.

The voice module allows contact centers to manage voice interaction between a business and its customers. With Presence Voice, a single agent can handle both outgoing and incoming calls, in **Blending** mode. Integration with CRM or call center platforms is achieved by using a CTI server, thereby ensuring that agents have all the necessary information in their CRM system when making or receiving calls.

Presence Voice has a powerful **predictive dialing** system that allows you to optimize the productivity of agents in outgoing campaigns. The dialer filters non-useful contacts, such as "no answer", "answering machine", and "FAX", and anticipates calls before the agent is available by using sophisticated prediction algorithms. The Presence dialer is considered the most powerful on the market today. Thanks to its predictive dialing, the effectiveness of campaigns, in terms of the number of useful contacts reached, increases exponentially.

General Features

Inbound

→ Stop control

This option allows you to manage stop control requests sent by agents. In an inbound service, you can indicate the conditions under which the stop request from the agent is accepted.

→ Route a call to the agent who captured it.

This option allows the system to pass a call to the agent who captured it, whether or not the agent is available, and only when the same caller calls back before the time indicated in the capture. If the agent is not available, the system puts the call on hold until the agent is free.

→ Automatically capture calls for a fixed number of minutes

This option allows the system to automatically capture all calls (for the agent that answered the call) in a service for a specified amount of time.

→ Caller identification using the ANI and other criteria.



The basic module of Presence Voice incorporates ANI call identification. Additional functionality available in the Intelligent Routing module allows caller identification using identifiers such as a national ID number, a policy number, or a customer code.

→ **Enable direct transfer to agents in a service**

This option enables voice and data transfer to other agents in the same service from Presence Agent. When this option is enabled, agents can transfer a call and related data to another agent in the same service after having checked the status of the other agent, which could be, for example, "busy", or "available".

→ **Maximum and minimum after-call work.**

This option allows you to specify a minimum time that an agent can remain in after-call work before taking a new call. Presence Voice also allows you to notify an agent, by means of alerts, that they have exceeded the after-call work time limit.

→ **Enable on-demand recording**

This option allows you to make on-demand recordings throughout the duration of the service. An on-demand recording is a recording of the call conversation that the agent starts and stops at their discretion from Presence Agent. Recordings can then be consulted, played back, and exported from Presence Supervisor.

→ **Outgoing e-mail management.**

When handling inbound calls, e-mails can be sent to the contact. Furthermore, when an e-mail is sent, the e-mail interaction is linked to the contact history.

→ **Malicious calls**

Malicious phone numbers are included in a list of telephone numbers from which a malicious call has been received and which has been classified as malicious. Such phone numbers are added to this list and are handled differently to other calls. To specify the list of malicious phone numbers for a service, you can enter the numbers manually one by one, or you can upload a list from any external database.

→ **Additional Inbound Module - Intelligent Routing**

Presence Intelligent Routing is an independent module of Presence Voice that allows you to define business strategies based on the intelligent routing of contacts that enter a contact center. This module notably expands the capabilities of contact redirection in the ACD from any channel including voice, e-mail, chat, web callback, and SMS. By using Presence Intelligent Routing, you can define the best destination for each contact that comes into the contact center. The powerful visual interface allows you to consult one or more databases, and establish criteria to redirect incoming contacts to the most qualified agent.



Outbound

→ Dialing modes

There are several outbound modes:

PREVIEW

This outbound mode allows an agent to work in such a way that when the system detects it must call an outbound record, the agent receives an alert (by means of a phantom call). The agent then gets the data of the outbound record and calls the contact by clicking the "Call" button. This outbound mode is useful when an agent needs to consult the data or history of the outbound record before calling the contact. An important setting is **Maximum time before call**, which allows you to specify the maximum number of seconds before a call is made after an agent has received a call alert. Once this time limit has passed, the system generates the call automatically if the agent has not already made the call.

PROGRESSIVE

In this outbound mode, Presence Server generates calls using progressive dialing through the specified CTI link. The call is generated after a contact has been finalized and the agent is available to take further calls. The calls-to-agent relationship is one-to-one, and as such, the number of calls in a service is always less than or equal to the number of agents. The system only transfers a call to the agent when the call has been answered at the other end, thereby ensuring that only useful contacts are transferred to agents, and productivity is optimized. Invalid records, such as "busy", "no answer", or "answering machine", are not transferred to agents and are qualified by the system as being invalid.

The **Check agent availability** setting allows the system to check the availability of agents in the service before making the call. The system generates the call only if, after having checked agent availability, the number of available agents is greater than the number of progressive calls currently active. This is a useful option when agents are working in several services (call blending). If the **Minimum number of available agents** is also selected, you can specify the minimum number of available agents for the service, so that the number of agents specified is always available to handle contacts from other services. You can enter the value as a number or as a percentage of the total number of agents working in the service. Outbound progressive mode generates a high volume of useful contacts by agent per hour.

PREDICTIVE

In this outbound mode, Presence Server generates calls using predictive dialing through the specified CTI link. The call is anticipated before an agent finalizes a contact and becomes available, meaning that the number of calls may be higher than the number of agents in the service. The system only transfers a call to the agent when the call has been answered at the other end, thereby ensuring that only useful contacts are transferred to agents, and productivity is optimized. Invalid records, such as "busy", "no answer", or "answering machine", are not transferred to agents and are instead qualified by the system as being invalid.



Three options are available to configure predictive dialing: by application, by time, or automatic.

Of all the dialing types, predictive outbound mode generates the highest number of useful contacts by agent per hour, and notably increases productivity and business goals ratios.

However, there are other less used modes available, including **manual** and **automatic** dialing, which can be implemented according to the business or service.

→ **Loads and automated lists**

The system allows you to incorporate information for the autodialer in a number of different ways. Using ODBC or BDE, you can connect directly to an external database to get dialing information.

→ **Prioritization and grouping of data**

The load system for dialing information allows you to prioritize information according to record, agent, or even load. You can also separate information according to your own grouping criteria when you upload data.

→ **Record locking**

Sometimes after creating a data load or list and handling the calls, you may need to deactivate or lock records. Presence allows you to filter and deactivate live records in an outbound service, and reactivate them at a later stage to call the contacts again.

→ **Alternative phone numbers**

You can enable the use of alternative telephone numbers in (customer) outgoing records, and select phone number descriptions to be used in the service, such as home, mobile, or work. You can also specify the number of consecutive call attempts in order to reach the customer.

You can specify up to three different telephone numbers that the Presence dialer can call according to the configuration settings of priorities and retries.

→ **Time zones**

You can specify a list of different time zones for each service. For each time zone, you indicate a unique code, a name, and a GMT time zone. Presence Server takes the time zone of each record into account to calculate the local time at which to call the customer.

In Presence Agent, the name of the time zone to which the outgoing record belongs is displayed in the contact information window of the current contact.

You can either indicate a time zone for an entire load or for a field in the table that contains the time zone code of the record.

→ **Enable customer calling hours**



This option allows agents of a service to specify individual calling hours for a customer when scheduling a record. If an agent specifies individual calling hours for a customer, any subsequent rescheduling made by the agent or the system, for example, due to no answer or busy signals, is made within the individual calling hours.

→ **Minimum and maximum after-call work time**

This option allows you to specify the minimum and maximum time that an agent can remain in after-call work before answering a new call.

→ **Enable on-demand recording**

This option allows you to record calls on demand throughout the duration of a service. On-demand voice recordings are started and stopped at the agent's discretion using Presence Agent.

→ **Do-not-call numbers**

Do-not-call numbers are included in a list of disallowed phone numbers that is configured in the Presence system. Telephone numbers in this list are never called throughout the duration of an outgoing service, even though they exist in a load for a service. The owners of these telephone numbers have explicitly requested not to receive calls related to any telemarketing campaign. Each time a load is created, the system checks if the telephone numbers in the outgoing records are on the do-not-call numbers list. If any of the telephone number are on the list, the record is loaded, but is given the status "do-not-call". This ensures that the record does not receive calls throughout the duration of the service.

Components of Presence Voice suite

→ **Administration environment**

The activities carried out in a contact center with the goal of fulfilling a particular client contract are called a **contact center service**. In this context, the term **service** describes the technical implementation of a Contact Center service in the Presence system framework.

For each service set up on the platform, an administrator must define an object, also called a service, in Presence Administrator. The service can be outbound or inbound, and controls all aspects of the service such as the flow of calls, and agent identifiers.

The administration environment includes:

- Administration of services and their settings
- Advanced queue movements
- Definition of profiles
- Assignment of ACD settings to the service
- Monitoring of server and logs



→ Supervisor environment

The Presence Supervisor module allows you to monitor various aspects of a service including the status of inbound and outbound services, agents, and active calls. In outbound services, you can also:

- Perform outbound queue movements
- Control outbound records in real time
- Monitor schedules and invalid records
- View real-time and historical reports and statistics by period and duration
- View agent and service productivity
- Check best and worst service hours
- Analyze campaign success

A wide range of reports are available that cover 99% of contact center requirements. To further complement or personalize the reports so that they comply with your own internal standards, you can use the Presence Custom Reports module.

→ Custom Reports

Presence Custom Reports is a powerful custom report generator. It incorporates an assistant to guide the user step by step in the creation and design of reports, thereby converting this task into a fast and simple process.

The custom reports tool, seamlessly integrated with all other Presence solutions, allows you to configure your own reports according to the specific needs of your contact center. It allows you to get the most out of the large volume of data managed in a contact center environment. Additionally, operational reports can be combined with business reports to obtain key indicators that can help you improve the strategy and management of a contact center.

The innovative Presence Custom Reports editor:

- Is intended for supervisors so that they can design their own reports about their contact center operations.
- Allows access to different databases by means of tables or SQL queries.
- Incorporates predefined mathematical functions that can be added to reports.
- Allows filters to be applied to data.
- Allows reports to be exported to different formats such as PDF, Microsoft Word, and Microsoft Excel.
- Is capable of saving and opening reports.
- Uses a highly visual interface.

Presence Custom Reports is aimed at all levels of user. An inexperienced user can create a report using the assistant and an expert user can improve the effectiveness of reports by directly accessing the Custom Reports components.

With Presence Custom Reports, call center data can be transformed into opportunities to optimize and add value to call center activities - all from a single environment without the need to run other programs.

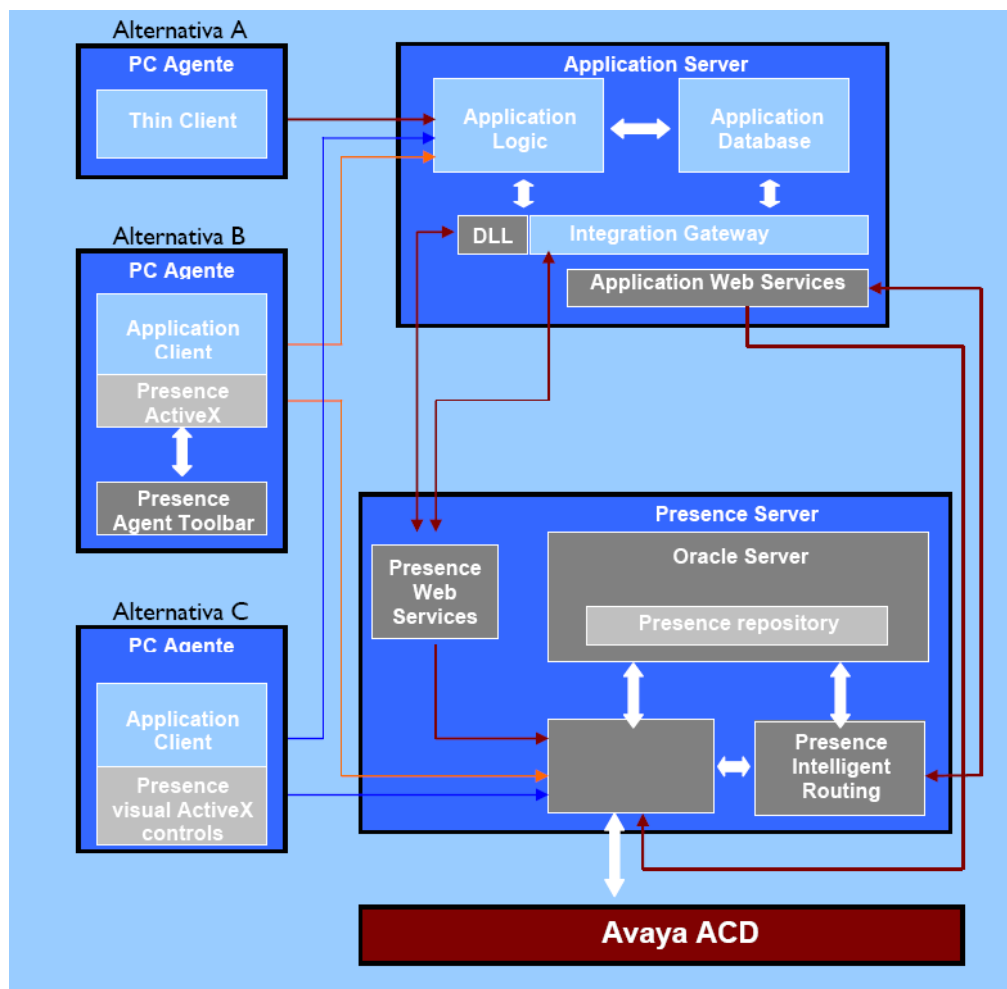


Integration with external applications

Presence Voice can be integrated with many types of external applications - from specific connectors developed for standard CRM packages such as Siebel, Vanity, or Clarity, to development libraries that contain all call handling features required in an internal corporate development environment.

Various types of custom integration are available:

- ActiveX
- DLLs
- Web services

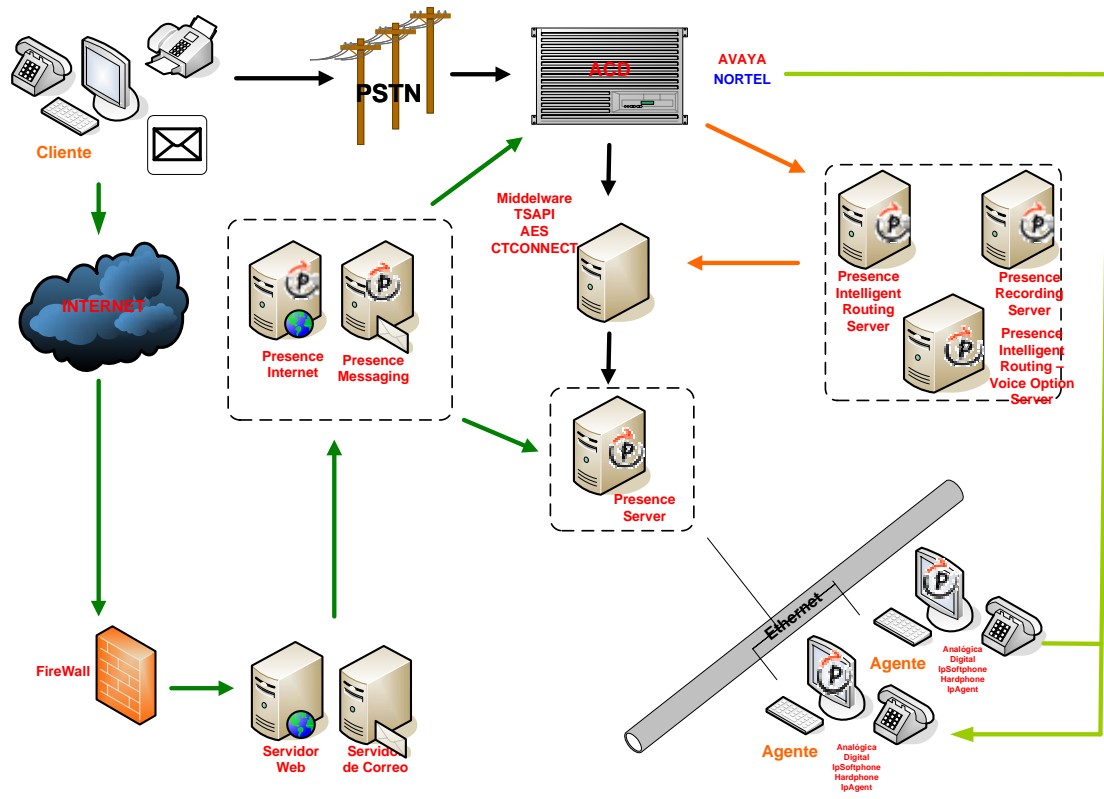


Hardware and software requirements

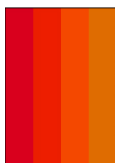
For more information about the technical and physical hardware requirements, see the documents "PCO_PSRHCO_ENG" for Presence suite, and "PCO_PSRHOG_ENG" for Presence OpenGate.



→ Presence suite architecture



Standard architecture



Presence OpenGate architecture

