



WHITE PAPER

Presence RoboDialer

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1 Introduction to Presence RoboDialer

Presence RoboDialer is a broadcast dialer which interfaces between two Presence Suite modules: Presence Voice Outbound and Presence IVR.

Presence Voice Outbound is a powerful dialer which can be configured to route useful contact to live agents or drone agents. The drone agent manages the call established by the dialer to be handled by the Presence IVR module, transferring contact and service information along with the call. The information provided allows the IVR engine to assign the proper strategy or IVR flow based on the business rules configured.

Presence IVR is a sophisticated self-service voice portal. It can integrate TTS and ASR engines, or support interaction through DTMF and pre-recorded audio messages. Customer interaction options can be mixed as desired. IVR strategies are created through a powerful, but easy to use, visual click and drop designer. This designer allows administrators the ability to create intelligent work flows which are able to make decisions and execute actions based on: information provided with the call, how the customer is interacting with the system, information stored on external source systems, etc. The system is able to: handle the call end-to-end without agent intervention, transfer the call to a voice mail, execute a live call transfer to a real agent, etc.

Presence RoboDialer provides an extensive reporting engine built into the product. If desired, personalized reporting is possible by activating the Presence Custom Reports module.

2 Presence RoboDialer Features

2.1 Dialing, Load and Campaign Management Features

2.1.1 Auto-detection dialer engine

The dialer engine can detect:

- Human Pick Up
- Answering Machine
- Busy Line
- No Answer
- Disconnected Line

Different actions can be configured if the system detects a human pick up or an answering machine, for example:

- If a human answers, the phone then route to an interactive strategy on the IVR
- If an answering machine is detected, just play back a message: asking to call back a number, reminding a payment, etc.

2.1.2 Loading Management / Automated Lists

Presence RoboDialer enables information (leads / contacts) to be added to the dialing engine using the following methods or formats: ADO, ODBC or BDE enabling connection to various databases (Microsoft SQL Server, Oracle, Access, etc.) or files (Excel, CSV, etc.) to load dialing information.

2.1.3 Prioritization and Segmentation of Samples

Prioritizes the information at various levels based on record information, load, etc. Additionally, when the contact information is loaded, it can be segmented according to the desired grouping criteria (ZIP code, VIP client, etc).

2.1.4 Blocking Records

Once the data has been loaded or listed and a certain number of calls have been made, it is often necessary to disable or block records so they are not called any more.

Presence Voice Outbound can filter live records based on various rules set to disable outbound calls to these numbers. They can be enabled again at any time as needed.

2.1.5 Updating Records

Presence RoboDialer provides complete control over records and has the option to add, edit or delete the currently loaded records using a reference table. Presence Voice Outbound includes the following options:

- Add records from the source table that have not been loaded
- Delete records from the load that are not in the source table
- Edit (update) the details of the loaded records that are in the source table

2.1.6 Unloading Records

Unloading an outbound service consists of removing records previously loaded into a queue or queues. These records are not deleted from the outbound queues of the service; their status is changed to "unloaded".

An unload process is usually performed when a specific set of records loaded is no longer required after the service has been put into production. The Unload can be applied to records from just one load or to all the records of a service.

2.1.7 Alternate Telephone Numbers

Presence RoboDialer enables the use of several alternate telephone numbers per record (per customer). The administrator simply selects which type of phone numbers will be used in the service (home, mobile, work, etc.), sets the number of consecutive attempts that will be made to each of these when trying to reach the customer, and the time zone by phone number type.

The dialing engine will call these numbers according to the priority and retry settings configured. Likewise, it is possible to set the order in which customer contact telephone numbers must be dialed.

2.1.8 Time Zones

Presence RoboDialer allows a list of different time zones to be set for each service. For each zone, a unique code, name and GMT zone must be specified. Presence Server

uses the time zone information of each outbound record to calculate the local time to determine when the customer is to be called.

The time zone may be set for the entire load or based on a field from the source table containing the time zone code per lead or record.

2.1.9 Do-Not-Call Telephone Numbers

Presence RoboDialer integrates the management of do-not-call telephone numbers which are registered in a list of restricted telephone numbers. No calls will be made to the numbers included in this list during the course of outbound services, even if they are part of the data loaded for a service.

Each time data is loaded, the system checks if telephone numbers match with those included in the do-not-call telephone list and assigns a “do-not-call” status. These records will not receive calls during the course of the outbound service.

2.1.10 Restriction on Number of Calls Made to Customer

Presence RoboDialer has the option to set a limit on the number of calls per day that can be made to a customer or record if qualified as an incident (busy tone, no answer, answering machine or fax). The number can be set at any value between 0 and 99.

2.1.11 Call Scheduling

Presence RoboDialer allows the administrator to schedule a call per contact. This scheduling information can be imported during the load process or updated on Presence Suite repository

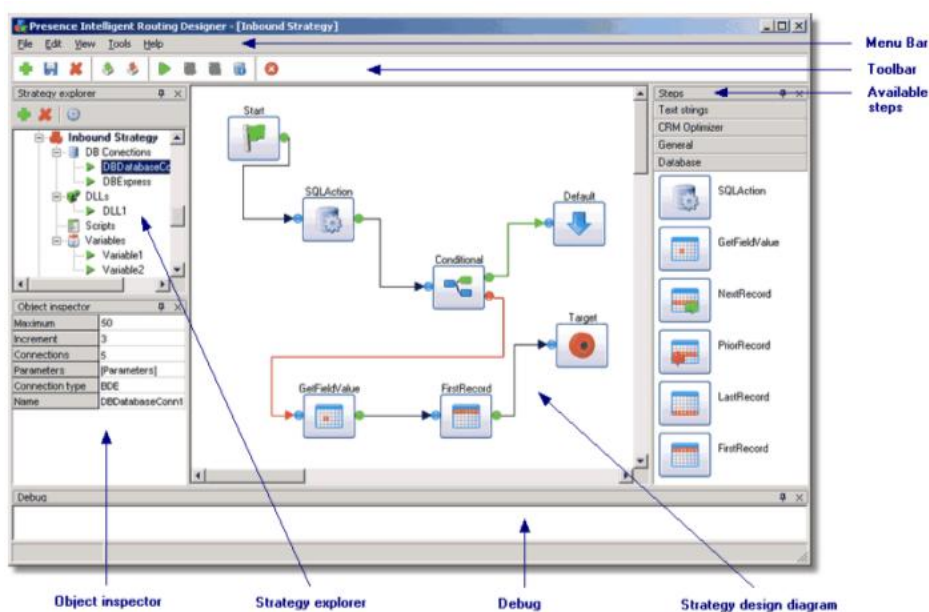
2.1.12 Service Hours

Presence RoboDialer takes in consideration the service hours / days, to ensure the system calls the contacts within a reasonable hour window. Service Hours control, takes in consideration contacts time zone.

2.2 IVR Features

Presence IVR allows the administrator to design any kind of interactive flows (strategies) for outbound broadcast (RoboDialer) and/or inbound services. The strategies can be as simple as playing back a recorded message or as complete as a full automated self service flow such as automating ticket sales or bank transactions using TTS and ASR as interaction engines.

Presence Technology provides a very intuitive and simple to use visual designer which allows evaluating and publishing the IVR flows.



Strategy designer screen layout

The list of features supported by Presence IVR is extensive. The most significant features are:

2.2.1 Data Access / Operations

- Connecting to external databases
- Executing SQL statements
- Using cursors on SQL queries
- Defining variables local to the strategy
- Assigning or querying data attached to calls
- Handling of text strings and regular expressions
- Performing arithmetic functions

- Querying parameters associated to contacts
- Get and Put data attached to the call
- Call qualification codes
- Conditionals (if and case)

2.2.2 Integration

- Running external DLLs
- HTTP Request
- Integration with other Presence Suite Modules (for example: inserting a new outbound record to be called)

2.2.3 Interaction

- Play Back pre-recorded messages
- Record messages
- Interactive Touch Tone response (Read DTMF)
- ASR language support for US, UK, Australian and New Zealand English, Mexican and South American Spanish, and Canadian French
- TTS voice support (male and female) for US and UK English, Canadian French, American Spanish, and German languages
- Voice Mail

2.2.4 Call Routing

- Transfer (internal and external numbers)
- Disconnect

2.3 Real-time and Historical Reports

Presence RoboDialer offers a wide range of real-time and historical reports providing the service managers with the information they need regarding the status and progress of loads, services/campaigns, call resolutions, etc. The reports supplied with Presence RoboDialer are accessible through the Supervisor module and may be exported using various formats, including: PDF, Excel, Word, etc.

If there is a requirement for customized reports or reports linked to business information stored in other systems and databases that are not part of the Presence Suite, the

optional Presence Custom Reports module provides an extremely powerful report designer with a graphical interface that allows Presence users to create and publish any tailor made report.

3 Presence Suite Modules

As previously mentioned, Presence RoboDialer constitutes the combination of two modules, of the many available, to complete the Presence Suite. The full Presence Suite module portfolio is:



Presence Voice Outbound: powerful and robust dialer that offers three different automated dialing modes: preview, progressive and predictive. It produces remarkable improvements in contact center productivity and also includes all the functionalities of Presence Voice Inbound.



Presence Voice Inbound: a complete solution for managing the flow of inbound calls, capable of combining any contact center interaction. Just like any other module from the Presence Suite, it can be integrated with any business application using the Presence SDK.



Presence Messaging: adds support for the management of e-mail, fax and SMS channels to the Presence Suite. These channels are managed by the universal queue which operates according to the business rules, priorities and skills of the agents selected in the system to handle the interactions.



Presence Internet: adds support for the management of Chat, Web Callback and Web Collaboration channels to the Presence Suite. These channels are managed by the universal queue which operates according to the business rules, priorities and skills of the agents selected in the system to handle the interactions.



Presence BackOffice: integrates the BackOffice tasks generated in the contact center into a single interaction management queue. This module gives control over these tasks, even if they are not related to interactions previously managed by the Presence Suite.



Presence Scripting: enables scripts to be designed and published so that they can be used in contact center services, using a very simple tool with an entirely graphical interface that requires no programming knowledge. Fully integrated with the Presence Suite, the scripts present and collect the information necessary in each situation to manage the customer or the service.



Presence IR: an engine that automatically performs routing actions based on business rules set up in the interaction management processes or flows. The engine can process any kind of interaction regardless of the channel (calls, e-mail, etc.), routing the interaction to the most qualified available agent.



Presence IVR: adds sophisticated self-service voice portal functionalities to the Presence Suite, integrating TTS and ASR engines. This allows intelligent strategies to be created, along with fully automated interactive services for the contact center.



Presence Recording: a system for recording the agent's conversations and screen. Recording can be activated in accordance with a preset recording plan (by service, extension or login) or on demand. Voice recording and screen captures are completely synchronized. This is an extremely useful tool for quality management or to generate proof of a transaction.



Presence Custom Reports: powerful and flexible report designer that can be used to create completely customized reports combining data from the Presence Suite and databases from other systems (e.g., ERPs, CRMs, Ticketing, etc.). It includes a wide range of connectors with other databases. Reports can be exported in various formats, including PDF, Word, CSV, Excel, etc.



Presence Supervisor: online management tool designed specifically for making it quick and easy for service managers to implement business rules in the Presence Suite. From this interface, all Presence Suite modules can be managed. It is operated entirely through a highly intuitive and easy-to-use GUI. The module incorporates a wide range of real-time and historical reports providing total management control over the contact center.



Presence Administrator: a management tool that enables the system administrator to configure technical parameters of the Presence Suite, as well as to grant different access levels and assign profiles for the various system users.



Presence Agent: front end in toolbar format that the agent uses to handle interactions. The module can be installed on the agent's workstation or run entirely through an online interface. The Presence Suite includes an automatic software update service.



Presence SDK: development kit that can be used to integrate the Presence Suite with any other business software tool used in the contact center.

More detailed information on each module can be found on the Presence Technology website: www.presenceco.com

4 About Presence Technology

Presence Technology is a software company focused on maximizing the contact center performance and experience.

Our dedication to serving the client has led us to develop solutions that adapt to the specific needs of each user. The Presence Suite offers great flexibility to a Contact Center's dynamics, and contributes directly to improved productivity margins for services, providing a return on investment unbeatable in this industry.

The Presence Suite is currently the most comprehensive collection of Contact Center solutions on the market, and has been developed to improve Contact Center management while achieving the highest levels of quality and customer satisfaction.

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