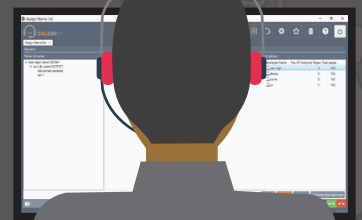


Call Center Management System



Abstract

ThinkPalm devised a Call Center Management System for a real estate developer based in Tokyo, Japan for enhanced employee efficiency, productivity and customer satisfaction. ThinkPalm's technical team worked on-site and left no stone unturned in assessing the capability of the end customer's existing legacy application to develop a more effective call center management software. The call center software leverages our expertise in designing and implementing performance driven, enterprise-wide data intensive solutions as well as integrating such solutions with third party PBX devices.

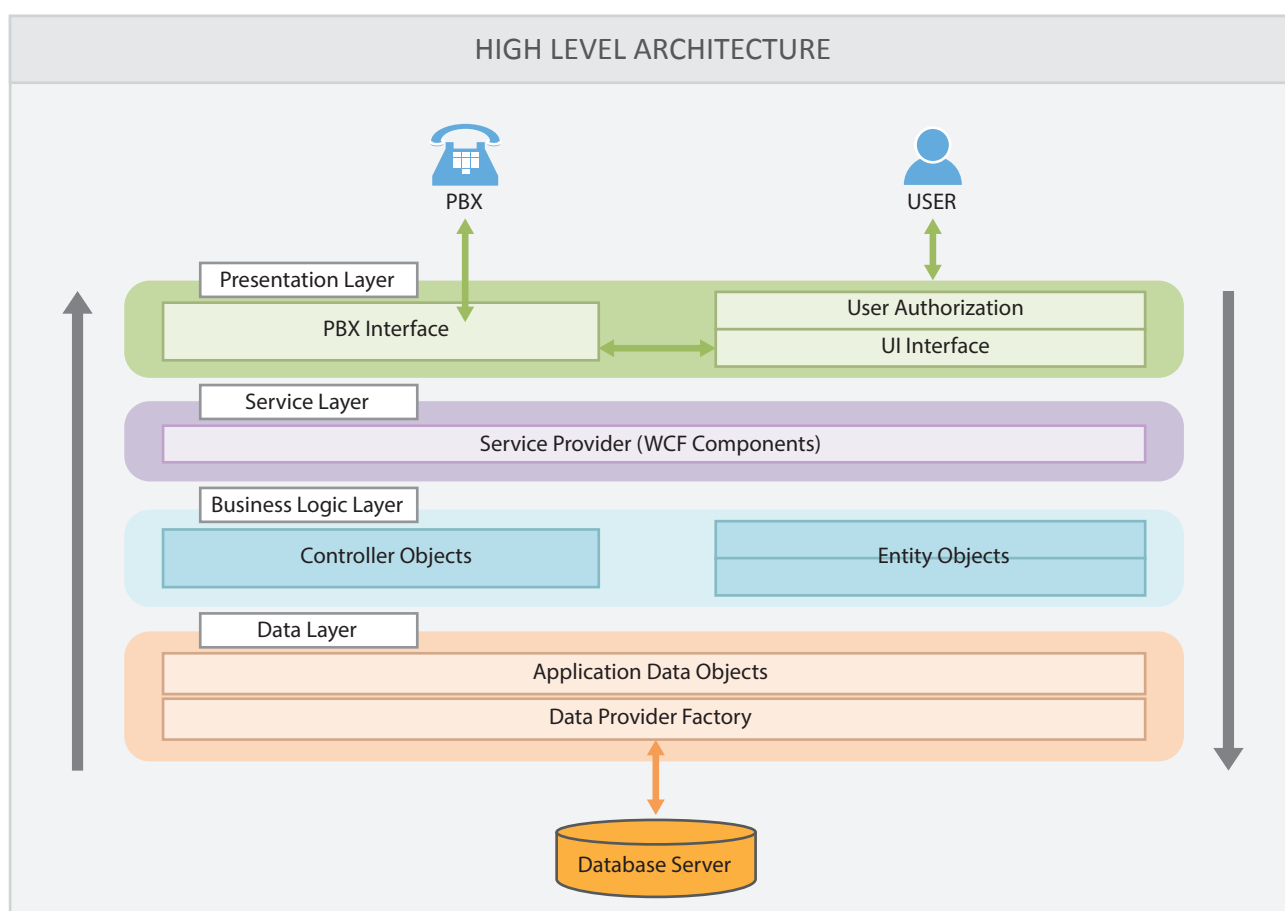


BUSINESS NEED

The end customer's legacy call center management system encountered numerous shortcomings, which were degrading the overall operational efficiency and productivity. The ineptness to avoid data redundancy led the call center executives to contact the same customers multiple times, resulting in customer agitation. The system also suffered from significant latency during the extraction of name lists, performed solely during non-business hours. The execution of campaigns crossed deadlines and budgets overran, culminating in increased overheads and business loss. Due to the lack of an effective system in place to supervise and control call prohibition by managers, executives often ended up calling key customers at undesirable hours, a scenario least desired in real estate sales.

EXPECTATIONS FROM THE SYSTEM

The client required an integrated call center scheduling software to streamline all facets of call center management such as outbound call handling, call data manipulation, work flow, user settings, name list extraction, removing customer data redundancy, prospecting, call prohibition, induced prohibitions, assignment of work to executives, monitoring and status reporting. The system had to directly interface with a PBX device to handle calls selected by the call center executive. The prioritization of tasks was expected to help the marketers reach out and interact with key prospects, facilitating the establishment of good customer relations. The solution had to possess the capability to automate the day-to-day activities of executives to mitigate operational complexities and improve efficiency.



KEY CHALLENGES

From a technology standpoint, the non-availability of a PBX device at the offshore center posed difficulties in establishing a test environment to test the functionalities of the PBX device such as call forwarding and parking. The availability of just one CAL license for a system to connect with the SQL server was a major challenge, which was tackled using service-oriented architecture. The team worked carefully on the integration of the APIs of the PBX system with the ThinkPalm software. Data migration was tricky, as just tabular designs were made available due to data security issues.

THINKPALM SOLUTION

The solution encompassed three important facets of call center management:

Name List Management: Name list feature automates various processes such as placing orders for name lists to vendors, importing purchased name lists, extracting customers from name lists and defining the extracted name lists, collating and grouping customers, assigning customers to call center executives and applying inducement breaks against customers.

Call Management: Call Management comprises activities related to contacting the customer. Standard Prospect, as part of this feature, allows adding new standard prospects, wherein the prohibition type can be defined. During an outbound call, the system allows the executive to enter the status of the call as a standard prospect, add memos and move key customers to a prospect box. Prospect Box enables easy grouping of customers to prioritize and contact on a regular basis.

Employee Management: The feature allows defining hierarchy in the company as Groups, Departments and Divisions along with assigning defined titles or roles to employees.

The screenshot displays the 'Import Process' window in the ThinkPalm CRM. The main form is titled 'Add purchase' and includes fields for Order No (7), Purchase Date (2016-05-05), Cost (1,000), Group (Samsung Group Name16575671), Manager (sam mgr), Incharge (sam su), Order Date (2016-05-05), Vendor (Vendorname Priyanka), Reason (test order reason), Purchase Details (test order details), Department (Sam dept name1567567), Division (sam div name15676571), Select CSV file name (C:\Users\priyanka.r\Desktop\test-files-tp ccms\CSV file with Sample Test Data), and Namelist (test namelist). There are 'Import', 'Save', and 'Clear' buttons at the bottom right of the form.

Below the form, there is a table with columns: Name, Home Address, Home Phone No, Company Name, Company Address, Company Phone No, Gender, and Furigana. The table shows four records: Priya, Ron, Shonu, and usha. A modal dialog box is open in the center of the screen with the message 'Importing process successfully completed' and an 'OK' button.

At the bottom of the window, there is a status bar showing 'Total Records: 4' and 'Total pages: 1'. The footer of the window displays '©2016 ThinkPalm Technologies'.

Making Extract Name List

Making extract name list

Purchase Date	Namelist	Reason	Pages	Customer No	Call ratio (%)	Right contact count	No of Inducement breaks	Contract count
1 2016/05/04	Testing the field values123	order reasonorder reasonorder reasc		1	4	0.00	0	0
2 2016/05/03	45345	order reason		1	4	0.00	0	0

Extraction Condition

☐ Prefecture
☒ Home
☒ Company
☐ Include
☐ Exclude

☐ Industry Type
☒ Include
☐ Exclude
 Industry type name
 ind type name

☐ Customer Job Title
☒ Include
☐ Exclude
 QA cus job title
 cus job title name

☐ Standard prospect

☐ Company name

☐ Phone No

☐ Exclude company phone
 Number of digits

☐ Call prohibition to home
☒ Include
☐ Exclude

☐ Call prohibition to company
☒ Include
☐ Exclude

☐ No of calls
☒ Include
☐ Exclude
 Less or equal

☐ Gender
☒ Include
☐ Exclude
☐ Man
☐ Women
☐ Unknown

☐ Phone
☒ Include
☐ Exclude
☐ Home
☐ Company
☐ Both

☐ Age
☒ Include
☐ Exclude

☐ Number of right person contact
☒ Include
☐ Exclude

☐ Latest call date time
☒ Include
☐ Exclude
 2016-05-05 Before

Extract Clear

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Assign Name List

Assign Name list

Name list name	Pages	Employee Name
Sam dept name1567567		
Sam div name15676571		
test extract namelist		
ext 1		

Department/Division	Employee	No. Of Assigned Pages	Total pages
Sam dept name1567567	Sam mgr	0	100
Sam div name15676571	dhanu	0	100
	name	0	100
	sp	1	100

Assign Deallocate Take over Customer wise take over

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The solution, thus, helps in the management of customer related calls along with the associated information and settings. CCMS caters to three types of users namely call center executives, supervisors and managers who use the different functionalities of the system.

Outbound

Outbound

CALLCEN CRM

Outbound

Standard Prospect

Customer name

Phone Number

Search

Clear

Prospect	Customer name	Company Name	Job Title	Age
	Priya	ThinkPalm Tech	QA cus job title	33
	Ron	FJ next		39
	Shonu	FJ next		43
	usha	FJ next		45

Virtual user: sp

Todays

Total time

Right Person Contact

Total Call

0:0:0

0

0

Home Company

furg

Priya

home address KG flat

04844104156

Changing Home No

Standard Prospect

Prospect Box

Memo

Save

Company Name

ThinkPalm Tech

Company Address

Athulya Building Infopark SEZ

Company Phone No

04840484

Changing Company No

Gender

Male Female Unknown

Age

33

Company department

testing comp dept

Title

cus job title text

University Name

Universityname of Tokyo

University Department

Speciality name

University Division

University dept

Print

Disconnect

Select

Call History

Prospect	Call On	Department	Division	Caller	Memo	Home/Company	Play	More
----------	---------	------------	----------	--------	------	--------------	------	------

Settings

Virtual user

©2016 ThinkPalm Technologies

TYPE PHONE NUMBER

Ver: 1.0.0

BENEFITS TO CLIENTS

The solution worked remarkably for the company by establishing a well-defined work flow for the call center executives and easing supervision by managers. The marketers could make or attend calls at their convenience with “Toolbar”, place customers in queue, reassign when busy, and categorize them into prospect boxes based on feedback. The enhanced attention and time spent on highly likely customers resulted in improved conversions and customer satisfaction. Call prohibition ensured none of the customers where contacted at undesirable hours. Efficient resource management and monitoring turned out to be a piece of cake for the top management through the employee management module.