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|--|---|--|
| Company Name   | Business type   |  |
| Total lines  | Total phones  |  |
| <b>Skill set 1</b>   |   |  |
| Function (sales, customer service, help desk, billing..)   |   |  |
| Hours of operation (Day, weekend, Holidays)  |   |  |
| Number of agents   |   |  |
| PC operating system on agents & supervisors  | <input type="checkbox"/> Windows® XP <input type="checkbox"/> Windows® 2000 <input type="checkbox"/> Windows® Vista |  |
| Number of supervisors  |   |  |
| Number of calls/day  |   |  |
| Number of calls queued   |   |  |
| Avg. hold time   |   |  |
| Avg. talk time   |   |  |
| Abandon. Rate? (approximate %)   |   |  |
| <b>Announcements while in queue</b>  |   |  |
| Play position in queue?  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| Play average time to answer?   | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| Customized announcements?  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| What happens when all agents are busy?   |   |  |
| <b>Routing</b>   |   |  |
| VIP callers?   | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| Route via auto attendant?  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| Route by DNIS (Toll free DID number?)  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| Call back callers who abandoned while in queue?  | <input type="checkbox"/> Yes <input type="checkbox"/> No  |  |
| <b>Options</b>   |   |  |
| Pop the customer database record while call is presented to an agent?  | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Dial out from any TAPI compliant customer database (Outlook, other contact management)?                      | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| While in queue, provide the option for callers to leave a call back number and keep their position in queue? | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Intelligent call routing based on information from an external database?                                     | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Route calls based on caller input information (i.e. account number)?   | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Record Agents on demand or scheduled? (if yes, how many calls are recorded simultaneously?)                  | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Unified messaging with Voice mail delivery to users' Email inbox   | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Private inbound FAX documents to users' Email inbox  | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| Outbound FAX from popular Windows programs   | <input type="checkbox"/> Yes <input type="checkbox"/> Yes, but future <input type="checkbox"/> No                   |  |
| <b>Customer Technical information</b>  |   |  |
| LAN server operating system and revision   |   |  |
| Email server and revision (is it IMAP4 compliant?)   |   |  |
| Email clients and revision   |   |  |
| Database name and revision (is it ODBC compliant)  |   |  |
| <b>Hot buttons:</b>  |   |  |
| Increase revenue   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Simplify system management and utilization via common user interfaces  | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Decrease cost of labor   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Improve personnel training   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Improved personnel efficiency  | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Lower abandonment rate   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| VIP treatment to VIP callers   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Improved reporting and real time statistics  | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |
| Improve agent/supervisor communication   | <input type="checkbox"/> Yes for sure <input type="checkbox"/> Not a focus for now                                  |  |