

Fidelity Contact Center



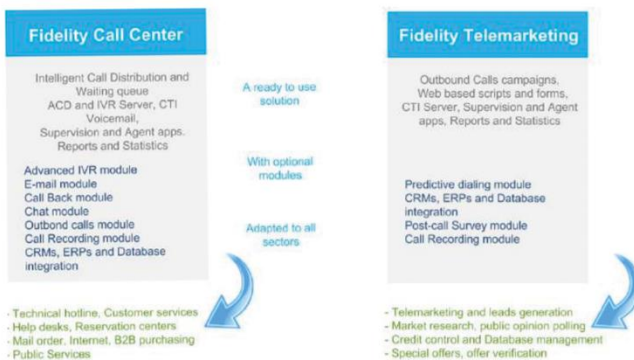
Contact Center for the Future

Fidelity is an advanced and cost effective Contact Center solution aimed at improving telephone attention and quality of service reducing the number of unattended calls and providing statistics on the contact center activity.

Fidelity is a consolidated solution, based on state of the art technology and it allows the supervisor to obtain all the relevant information in real time, in order to manage and optimize available resources.

Fidelity handles and distributes a large volume of calls, reducing the number of unattended calls, and optimizing costs.

Fidelity may also handle emails and chats, and may be integrated with CRM and ERP solutions. The Telemarketing option may be used to easily and efficiently generate outbound call campaigns.



Fidelity is unique because it adapts to companies of any size and from any sector, and greatly improves answer rates. The solution has been designed for call-centers, contact centers, customer service centers, and in general any organization which needs to handle large volumes of calls with limited resources.

Improve customer service levels

Improve call response times

Reduce rate of unattended calls

Optimize costs and internal resources

Handle and distribute larger call volumes

Increase productivity and agent efficiency

Fidelity Contact Center Features



Automatic routing of inbound traffic	According to dialed number (DNIS) / calling number (ANI), IVR, schedule
Groups and waiting queues	Possibility to create unlimited number of groups and queues
Intelligent and multi-criteria call distribution	Longest idle time, skill based, urgent / forced transfer, same agent as previous call
Automatic call-back function	Enables callers to exit the queue and receive a call-back when an agent becomes available and within a certain time interval
Management of agent skills	Multiple group agents, skills profile, priority levels
Dynamic sizing of waiting queues	Maximum number of queued calls according to active agents, maximum percentage of agents on break
Real time supervision and wallboards	Calls in each queue, on hold times, agent status, available on supervisor screen and external TV screen
Alarms and warnings	When exceeding maximum authorized on hold times, call durations, or maximum agent break times
Productivity and performance evaluation	Broad range of statistical reports and graphics. Real time data display on external wallboard
Interactive web-based forms	Enables the creation of scripts and questionnaires for inbound and outbound calls, with conditions and multiple replies
Call recording	On demand, selective, massive, or according to agents & groups
Post call surveys	Unlimited number of questions, results per agent/group
e-mail distribution	Messages are assigned to groups of agents according to keywords and agent profiles
Free Seating	Allows agents and supervisors to use workstations dynamically
Outbound call campaigns	Automatic call generation for telemarketing campaigns with different operating modes (preview, progressive, predictive, multiple progressive), call blending
Messages and music	Welcome/patience messages customized according to groups or position in the queue and updated without service interruption
Breaks and Wrap-up-time	Programmable with predetermined durations
Modular and scalable solution	Agents, supervisors, IVR ports, recording channels
Chat module	Enables chat with an agent from the customer web page
CRM/ERP Integration	To identify incoming contact and show data on agent's screen

Fidelity Contact Center



The **starting Fidelity package** is a ready-made application including the following modules:

Software Server
Fidelity CTI Server (TAPI, TSAPI, CSTA) + ICR + SQL Express Database
ACD Server
For incoming call queuing, IVR, and announcements (SIP or Analog Interface)
Configuration module
Allows programming call distribution rules and users, positions and groups
Messages and Music
Immediate update of system messages

PC SERVER

The basic package includes the CTI and ACD server, the SQL Express data base, and software licenses for:

- ✓ **4 channels for calls in the queue**
- ✓ **4 agent's positions**
- ✓ **1 supervisor position**
- ✓ **Reporting and statistics package**

The number of agents and supervisors, as well as the number of calls in queue may be increased by ordering additional licenses.

() The optional analog interface is based on a proprietary hardware appliance for call queuing and music/message playing. 19" 1U rack unit up to 8 ports/ unit, up to 64 ports*

SUPERVISORS AND AGENTS

Fidelity is supplied with desktop and web based software applications for the agents and supervisors.

The basic package also includes a reporting package accessible via web and as a desktop application.

Supervisor and Agent module
Windows version and Web Client
Reports and Statistics module
Full and detailed analysis of the Call Center activity

Fidelity Contact Center Add On's



Call recording

Fidelity provides a wide range of recording solutions for different types of lines and extensions:

Permanent recording of all calls, selective recording per agent, group or client, and recording on-demand originated by the agent or the supervisor.

Agent control – Prevent and resolve disputes



Integration with CRM applications

Fidelity may be integrated with CRMs, ERPs, and proprietary software applications developed by the customer.

The integration may be used to identify the contact and transfer the call to the most appropriate agent, or to pop-up the customer file on the screen of the agent answering the call.

Customer Identification - Pop up of the CRM file on the screen of the agent



Post call survey

This option automates the process of post-call telephone surveys to measure quality of service and customer satisfaction. Results are stored together with data of the customer and of the agent who attended the call.

Monitor customer satisfaction – Evaluate quality of service



E-mail distribution

Enables the intelligent distribution of emails to the different groups of agents on the basis of keywords in the subject or in the text itself.

This feature may be combined with the call distribution so that an agent does not attend



Chat Module

Enables customers to contact an agent and chat in real time from the web page they are currently looking at.

This module opens a new and convenient communications channel between clients and agents.

New communication channel via the web

Fidelity Contact Center Modules



Agent Application

Windows or web-based application running on the agents PC, allowing agents to start a session (log-in), view call data, and control the phone from the PC.

Available data are: The called party name (queue name), the caller's number, the amount of calls on hold in the queues to which the agent belongs, and the longest waiting time.

From this screen, an agent is able to control the phone and record calls on-demand.

A "chat" text messaging service is available between each agent and the relevant supervisor/s.

The agent may enter and exit break mode, enter the type of break or any additional comment.



The Browser-based version does not require software installation on agent stations and allows home office working

Customer file Pop-up

In addition to offering the agent a pop-up with the basic call data and a quick access to telephony functions, Fidelity may be integrated with CRM and ERP applications to identify incoming calls, showing customer data on the agent's screen.

Several integration modes may be implemented: one of them consists in getting data from the CRM data base to identify the customer on the basis of the phone number, and transfer the call to the most appropriate agent, or else, give the call a specific priority depending on the customer profile.

It also enables popping up the CRM file so that the agent has all the information available for optimal call attention.



Integration with the different CRM/ERP softwares may be achieved in different ways:

Web Services, URL, XML, DB queries, text files, OCX.

Fidelity Contact Center Modules



Supervisor Application

It is a Windows based application through which a supervisor is able to monitor and control the complete activity of one or several queues and agents in real time.

The screenshot displays the Supervisor Application interface, which is divided into several sections:

- Calls lists:** A grid of call lists for different queues: HOT LINE, CLIENTS, BOOK SALES, INTERNATIONAL, and GLOBAL. Each list shows columns for Phone No. and On hold time. Below each list, there are call counts and on-hold durations. For example, the GLOBAL queue has 6 calls and 00:00:54 on hold.
- Fidelity groups:** A sidebar on the left lists the groups: CLIENTS, HOTLINE, BOOK SALES, INTERNATIONAL, and GLOBAL.
- Agents of the group CLIENTS:** A table showing the status of agents in the CLIENTS group. Each agent's status is represented by a colored circle (green for online, red for on break, grey for offline) and a number. The agents listed are Tom (116), Mary (208), Pierre (213), Michael (129), Caroline (214), Nicholas (288), Paul (288), Christina (198), Ann (263), Michael A. (246), Robert (246), Alex (246), Rachel (263), Michael A. (246), Robert (246), and Stephen (246).

Alarms

Alarms warn the supervisor when maximum call duration, queue times and break times are exceeded or when an agent's status changes.

Manual Call Distribution

If a queue is overloaded, the supervisor may enforce call distribution among inactive or on break agents, or register him/herself as an agent and attend the call.

Easy intervention

The supervisor is able to intervene in any active call, in order to increase the quality of service.

Control of the Agents

The supervisor has access in real time to a summary of the status of agents in any group: time on-line, time on-break, and time in conversation.

Agent-Supervisor Collaboration

Fidelity provides an efficient "Chat" text messaging between the supervisor and the agents that greatly improves global service quality.

Statistics

The Supervisor has direct Access to reports and recordings relevant to the queues under his/her control.

Fidelity Contact Center Modules



Wallboard Module

The Wallboard module displays relevant information about the call center activity and the Quality of Service. It is accessible from any web browser (supervisor PC, TV, Smart Phone, Tablet) and data are shown and updated in real time.

The module is composed of two different screens, a **Global View** which displays analytical and cumulative data (Quality of Service, Total Calls), and a **Detailed View** which displays specific information about agents and calls in the different queues.

Global View

- ✔ Calls waiting per queue
- ✔ Maximum waiting time
- ✔ Total calls attended
- ✔ Total calls missed
- ✔ Status of the queues
- ✔ Status of the agents
- ✔ Quality of service
- ✔ Number of calls per group



The Detailed View dashboard displays the following information:

- Summary:** 8 Agents, 1 In queue.
- Agents Table:**

Agent	Extension	Status	Group	Phone number	Total calls	Total duration
Helen P.	145	Free			7	1:06:22
John D.	156	Free	HOTLINE	0034915610110	6	1:12:23
Robert W.	148	Free			8	1:15:02
Paul M.C	154	Free	PREMIUM	0044125638587	5	0:45:25
Maria P.	152	Free			8	1:02:03
Peter F.	149	Free	PREMIUM	00494525688588	7	0:58:45
John M.	151	Free			9	1:24:12
Idam A.	144	Free	OPERATOR	0044145258966	15	0:31:12
- Calls Table:**

Group	Phone number	Waiting time
OPERATOR	0034914562563	0:00:15

Detailed view

- ✔ Number of agents connected
- ✔ Number of calls in queue
- ✔ Agent related data
 - Name
 - Extension
 - Status
 - Group
 - Phone number
 - Total calls attended
 - Total conversation time
- ✔ Details of calls in queue

The Wallboard module is a browser-based application suitable for large wall-mount displays, supervisor stations and mobile devices.

Fidelity Contact Center Modules



Post call Survey

This option, called **GC 9000**, automates the process of post-call telephone surveys for rating the quality of attention, and stores the results in Excel format for later processing by the customer.

At the end of each call, the agent transfers the call to the designated group of extensions of GC 9000 in the SIP server, which plays a greeting message and asks the questions one by one. The caller replies by DTMF, and all call data (extension, calling number, date and time), together with the answers to the survey are stored in an Excel file.

Benefits for the company

- ✔ *Data stored in Excel*
- ✔ *Up to 24 simultaneous surveys*
- ✔ *Rating by DTMF codes*
- ✔ *SIP Server or dedicated analog IVR Hardware appliance*
- ✔ *Ease of use and administration*
- ✔ *Full Control of the service quality*
- ✔ *Agent Evaluation*

Call Back Module

The call-back module provides the caller with the possibility to exit the waiting queue and to request a call-back. While waiting in the queue, a message informs the caller about the possibility to stop waiting and be called by the first available agent.

The caller may enter the call-back number if different from the original calling number.

As soon as an agent is available, the system automatically calls the customer from the agent extension.

It is important to note that the company using Fidelity has the possibility to define specific time-intervals for call-back in order to avoid excessive load on the agents at peak times.

Fidelity Contact Center Modules



Recording Module

Fidelity integrates smoothly with the **Recall** family of call recording solutions.

The Recall range provides professional recording solutions for any environment and type of recording:

- ✓ **Permanent call recording**
To record all call-center conversations.
- ✓ **Selective call recording**
Allows selecting specific agents, groups, or customers for which calls shall be recorded, in order to evaluate quality of attention, or keep track of specific transactions.
- ✓ **Recording on-demand from the agent**
For example, to keep a record of an order confirmation or contract conditions.
- ✓ **Recording on-demand from the supervisor**
For example, to train new agents or to check their performances.



In many cases, recording is mandatory to comply with legislation and keep transaction data

A multi-user software tool (for Windows or web access) is used for searching and listening to the conversations from any location.

E-mail Distribution

The e-mail distribution module allows the automatic delivery of email messages to the different groups of agents.

All e-mails arrive at a single address, and are then distributed one by one to the most adequate available agent according to specific keywords within the subject or the text itself.

If no agent is available, e-mails are kept on a waiting queue in order to be delivered in the shortest possible time to the first agent who becomes available. This ensures a comprehensive follow-up of all the emails received.

E-mail distribution benefits

- ✍ *Assigning a case number for follow-up*
- ✍ *Improves e-mail follow-up and optimizes replies*
- ✍ *Allows simultaneous tasks (telephone attention/e-mails)*

Fidelity Contact Center Modules

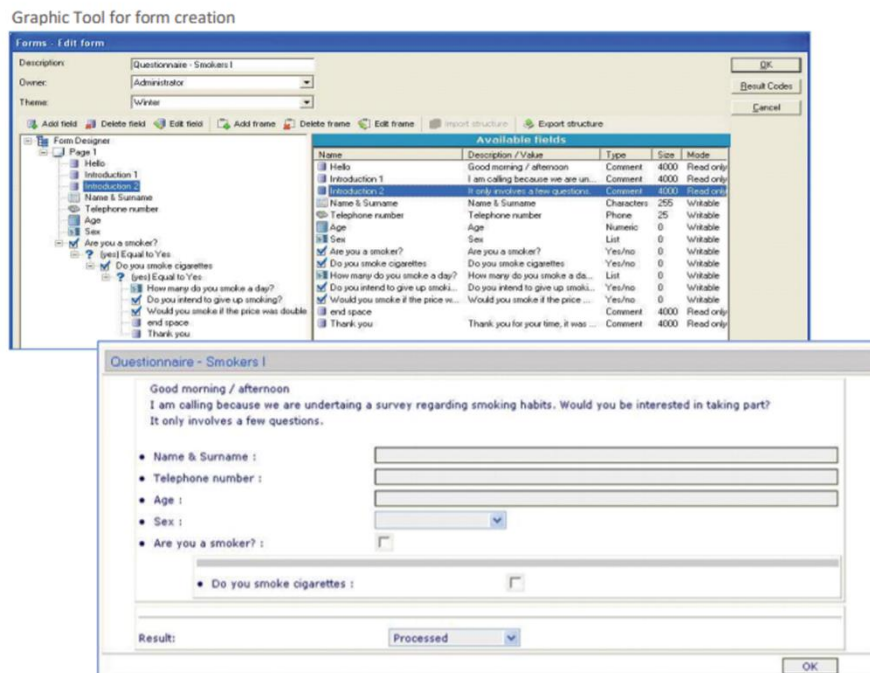


Web Forms

Fidelity is delivered with an intuitive and powerful tool which enables the creation of Web-based scripts, forms and questionnaires totally adapted to the needs of each specific customer in order to help agents for both outbound campaigns and inbounds calls.

Fidelity forms are automatically displayed as popups on the Agent's screen with all the information required to properly attend the call. The information which appears on the form is stored on a **SQL database (supplied)**. The data may be initially imported from any existing file, and the updated data may be exported to an Excel sheet at any time.

The forms may contain **basic customer data** such as the phone number, name, address, and any other field which may be of interest to the agent when attending the call. They also allow the agent to **introduce new data** for this customer, as well as comments concerning the current conversation. The forms may contain all kinds of information, recommendations and tips, to help the agent during the call.



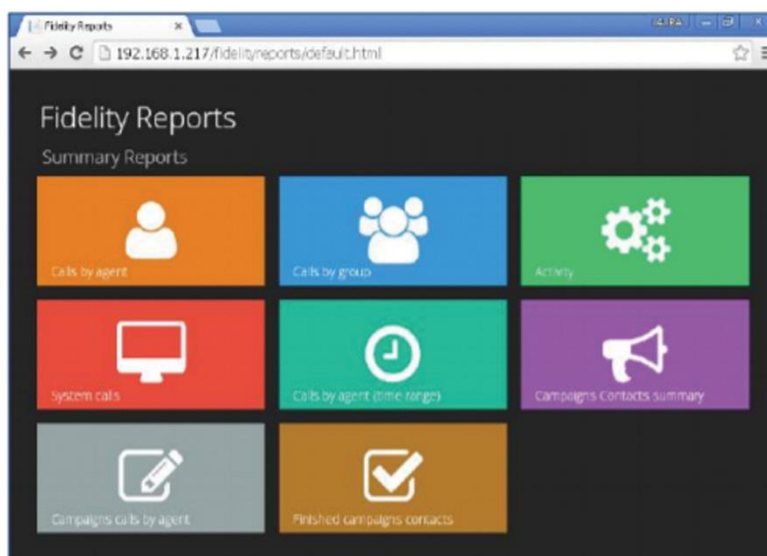
The forms contain texts and questionnaires totally adapted to the specific needs of each customer, and they may be used for both outgoing and incoming calls.

Fidelity Contact Center Reports



Reports and Statistics

Fidelity provides a wide variety of reports and statistics for the control and evaluation of the contact center operation, the agents' activity and productivity, as well as the Quality of Service.



The reports and statistics module also provides **complete analysis** of calls received, attended, and missed, sorted out by agent, by group, or for the entire contact center.

Reports may be viewed on the screen, printed, or automatically sent by email. They may be exported to a number of formats such as: **Excel, PDF, TXT...**

Reported data may be filtered out according to date and time, agents, groups, and a number of additional criteria specific to each report.

Per Agent	Per Group	Global
Sessions breaks, Attended calls, Missed calls, Response times, Call durations, Productivity	Traffic Volumes Groups comparison Missed calls Call durations	Global Traffic volume Missed calls Response times

The reports may also be configured to be **executed automatically** at specified times, by creating a profile with a number of associated reports with their respective output formats and their destination (email address).

Fidelity Contact Center Reports



System Calls (summary)

This report provides a global view of the system per time interval. It shows the traffic volume, the peak times, the percentage of missed calls (including the stage in which the calls were lost), as well as response times for attended calls.

It is important to note that this reports concern all calls arriving to the Fidelity system, from the time they reach the IVR ports. This means that some of those calls shall not necessarily reach the agents, for example if they are dropped while the welcome message is played.

System calls (summary)

Period: 23/02/2015 - 01/03/2015
 Schedule: 8:00 - 21:00
 Groups: All
 Status: All
 Missed: All

Time	Total	Attended	< 60	< 120	< 180	> 180	Missed	Abandons	Failed	Welcome	In Queued	< 60	< 120	< 180	> 180	Agents	
8:00 - 8:59	10	6	60,00%	6	0	0	4	40,00%	4	0	0	4	100,00%	4	0	0	6
9:00 - 9:59	36	25	69,00%	24	1	0	11	31,00%	10	1	0	11	100,00%	8	2	0	7
10:00 - 10:59	33	26	79,00%	26	0	0	7	21,00%	6	1	0	7	100,00%	6	0	0	7
11:00 - 11:59	39	33	85,00%	33	0	0	6	15,00%	4	2	0	6	100,00%	3	1	0	2
12:00 - 12:59	34	23	68,00%	23	0	0	11	32,00%	11	0	0	11	100,00%	10	1	0	6
13:00 - 13:59	48	36	75,00%	35	0	1	12	25,00%	10	2	0	12	100,00%	9	1	0	2
14:00 - 14:59	32	20	62,00%	19	1	0	12	38,00%	11	1	0	12	100,00%	11	0	0	7
15:00 - 15:59	25	15	60,00%	15	0	0	10	40,00%	10	0	0	10	100,00%	10	0	0	7
16:00 - 16:59	20	18	90,00%	18	0	0	2	10,00%	2	0	0	2	100,00%	2	0	0	6
17:00 - 17:59	21	19	90,00%	19	0	0	2	10,00%	2	0	0	2	100,00%	2	0	0	4
18:00 - 18:59	18	7	39,00%	7	0	0	11	61,00%	11	0	0	11	100,00%	11	0	0	2
22:00 - 22:59	2	0	0,00%	0	0	0	2	100,00%	2	0	0	2	100,00%	2	0	0	0
TOTAL	318	228	72,00%	225	2	1	90	28,00%	83	7	0	90	100,00%	78	5	0	7

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Agent Calls (summary)

This report shows for each agent the total number of calls received, attended and missed, the total conversation time, and the average and maximum call duration.

Agent calls (summary)

Period: 01/02/2015 - 28/02/2015
 Schedule: 8:00 - 20:00
 Agent: Juan Carlos Rico, Fernando Perez Cano, Crescencio Troccoli Alvarez, Elena de Lara, Inmaculada Sanchez, Auxiliar Hotline, Ricardo, Demo_chat, Pepe Paco, Miguel A. Rodriguez, Antonio Terro
 Type: All
 Missed: Yes

Agent	Total	Talk	Total	Attended	Missed	Not transferred	Talk	Avg. Talk time	Staging	Total	Attended	Talk	Avg. Talk time
Auxiliar Hotline	1	00:00:00	0	0	0	0	00:00:00	00:00:00	00:00:00	1	0	00:00:00	00:00:00
Crescencio Troccoli	96	00:00:00	56	0	56	-1	00:00:00	00:00:00	00:20:51	40	0	00:00:00	00:00:00
Demo_chat	8	00:00:00	6	0	6	0	00:00:00	00:00:00	00:00:29	2	0	00:00:00	00:00:00
Elena de Lara	62	00:00:00	13	0	13	-1	00:00:00	00:00:00	00:03:08	49	0	00:00:00	00:00:00
Fernando Perez Cano	1	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:02	0	0	00:00:00	00:00:00
Inmaculada Sanchez	92	00:00:00	18	0	18	-2	00:00:00	00:00:00	00:05:22	74	0	00:00:00	00:00:00
Juan Carlos Rico	69	00:00:00	28	0	28	-8	00:00:00	00:00:00	00:08:24	41	0	00:00:00	00:00:00
Miguel A. Rodriguez	100	00:00:00	45	0	45	0	00:00:00	00:00:00	00:10:07	55	0	00:00:00	00:00:00
Pepe Paco	17	00:00:00	9	0	9	-1	00:00:00	00:00:00	00:02:11	8	0	00:00:00	00:00:00
Ricardo	10	00:00:00	1	0	1	0	00:00:00	00:00:00	00:00:09	9	0	00:00:00	00:00:00
TOTAL	456	00:00:00	177	0	177	-13	00:00:00	00:00:00	00:50:43	279	0	00:00:00	00:00:00

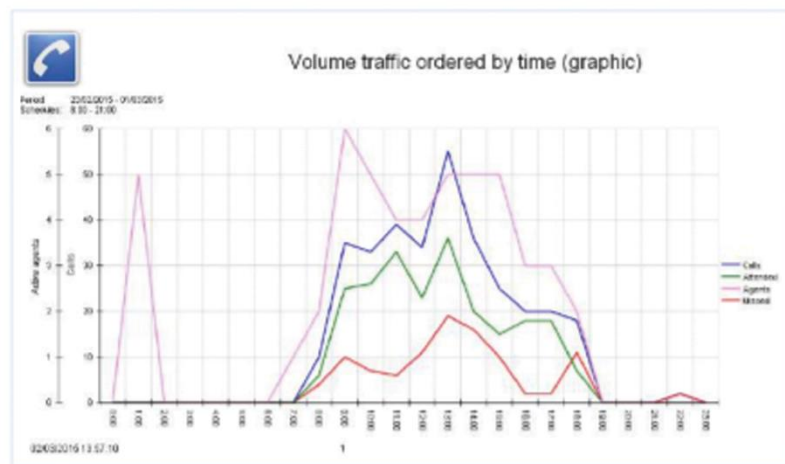
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Fidelity Contact Center Reports



Volume traffic ordered by time (graphic)

This graph shows global traffic volume by hours, with the total number of calls received, attended and missed and the number of active agents.



Agent Calls

This report shows the details of the calls received by the agents, including date and time, calling number, call duration, and destination group.

Agent calls (detail)

Period: 01/03/2015 - 31/03/2015
 Schedules: 8:00 - 20:00
 Missed: All
 Agents: Elena de Lara
 Call type: All

Agent: Elena de Lara

Date	Time	Phone number	Type	Ringng	Talk	Hold	Missed	Group
02/03/2015	11:00	22	O	00:00:06	00:00:29	00:00:00	No	
02/03/2015	11:00	71	O	00:00:22	00:00:20	00:00:00	No	
02/03/2015	11:01	914280919	O	00:00:01	00:00:44	00:00:00	No	
02/03/2015	11:02	677599596	I	00:00:02	00:04:43	00:00:48	No	OPERADORA
02/03/2015	11:07	934489520	I	00:00:02	00:00:43	00:00:20	No	OPERADORA
02/03/2015	11:08	72	O	00:00:03	00:00:16	00:00:00	No	
02/03/2015	11:19	932700200	I	00:00:11	00:00:35	00:00:26	No	OPERADORA
02/03/2015	11:20	72	O	00:00:04	00:00:21	00:00:00	No	
02/03/2015	11:32	932700200	I	00:00:06	00:00:15	00:00:08	No	OPERADORA
02/03/2015	11:32	72	O	00:00:02	00:00:05	00:00:00	No	

10 Calls

02/03/2015 13:00:48 1

Fidelity Contact Center Telemarketing



Fidelity Telemarketing is an optional module designed specifically for carrying out outbound call campaigns using automatic dialling (Preview, Progressive or Predictive) and intelligent forms processing. It generates a large number of calls to potential customers and contacts, taking their numbers from an existing data base.

Fidelity Telemarketing also allows the follow-up of the campaigns, and may show at any time the number of calls made, attended, and pending. The data obtained by the agents during the conversation are stored in the SQL data base for later processing.

Features and Benefits

- ✔ *Automatic dialling. Error free*
- ✔ *Customized campaign forms*
- ✔ *Multiple answers*
- ✔ *Automatic and programmable repetition of uncompleted calls*
- ✔ *Supports multiple campaigns and multiple forms simultaneously*
- ✔ *Call deferrals by date and time. Customizable for individual agents*
- ✔ *Data input form any OLE DB Source*
- ✔ *Campaigns tracking and supervision in real time*
- ✔ *Export of campaign results to Excel + reports package*
- ✔ *Call blending and resource optimization*

Fidelity Telemarketing supports several automatic dialling methods to suit the needs of the different environments and sectors: **Preview dialling** where the call is initiated at the agent request (click to dial), **Progressive dialling** without agent intervention, and **Predictive dialling** which enables a larger call volume and a more efficient use of the resources..

Fidelity Telemarketing also supports an exclusive dialling mode called **Multi-Progressive dialling** which ensures a more efficient occupation of the agents, and shortens the campaign execution time.

Designed for

- Telephone surveys
- Public-opinion polling
- Telemarketing and telesales
- Appointments confirmation
- Credit control
- Market research
- Call campaigns using automatic dialling

Preview

Predictive

Progressive

Multi-progressive

-Intelligent Form Management

Fidelity Contact Center

