

# *Skills-Based Routing*

A Skills Routing Application for the NEAX 2400 and NEAX



A TFB Whitepaper

T F B W H I T E P A P E R

## Executive Summary

For organizations that rely on their call center for primary customer contact, ensuring that callers are handled by agents with the right skills can mean the difference between retaining customers or losing them to the competition.

TFB's *Skills-based Routing* increases staff effectiveness by connecting the best available agent to each call. Not only does the caller get the agent with the most appropriate skills, but they get the available agent rated *highest* in that skill. Supervisors grade agents in each assigned skill, revising grades based on performance and training levels. Whether a call comes from Automated Attendant, ANI-based routing, or transfer from another department, *Skills-based Routing* ensures that each call gets answered by the available agent that is most suited to handle the caller's needs.

*“...ensuring that callers are handled by agents with the right skills can mean the difference between retaining customers and losing them to the competition.”*

## Features

TFB's *Skills-based Routing* lets your supervisors control which agents get which calls. It interacts seamlessly with other routing tools from TFB to help ensure callers quickly get not only to the right agent, but to the best available agent. Supervisors easily update and maintain agent ratings in configurable skill groups.

### Features Summary

- **Easy to Use Configuration Tool** - Supervisors don't need to be network administrators to update agent skill ratings as frequently as required.
- **Intuitive Grading System** - Instead of needlessly complex priority schemes, agents are given an A through F grade in each skill.
- **Integrated with Other Features** - Integrates seamlessly with TFB's *Enhanced Automated Attendant*, *ACD Reports*, and *Enhanced Call Center Routing* to provide a truly comprehensive call center routing solution.

**Skills-Based Routing**

Administration | Advanced Settings

Agent: Tom Smith - 2317

| Skill Group      | Channel  | Grade | Preference |
|------------------|----------|-------|------------|
| Sales English    | Phone    | A     | 1          |
| Sales Spanish    | Phone    | C     | 5          |
| Help Desk        | Web Chat | D     | 1          |
| Contracts        | Email    | B     | 2          |
| Premium Accounts | Phone    | A     | 2          |
| Premium Accounts | Web Chat | A     | 2          |
|                  |          |       |            |
|                  |          |       |            |

Agents are configured individually

Agents are graded using intuitive ABCD system

Multimedia contact channels such as Web Chat and Email are supported

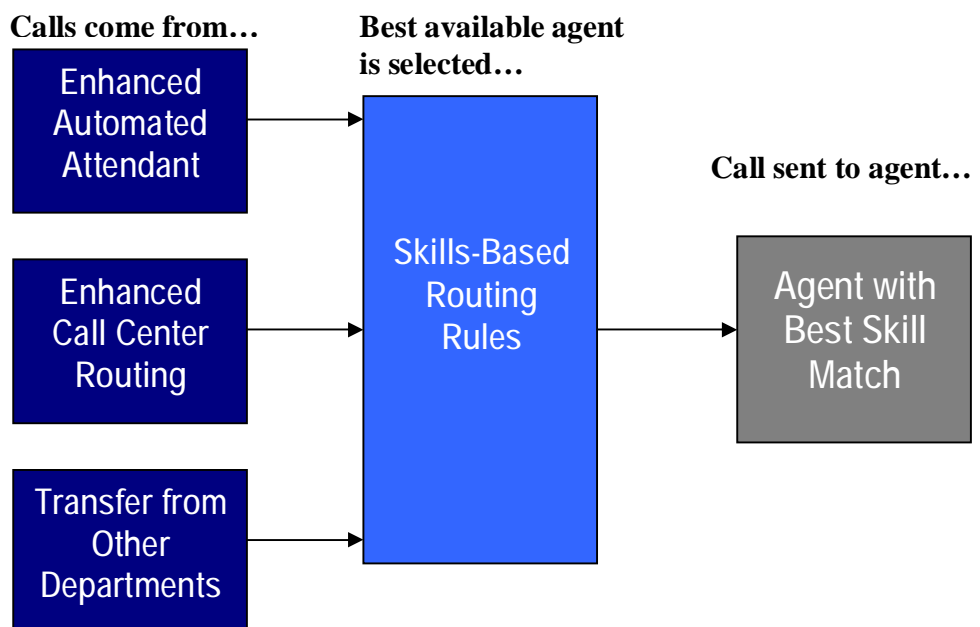
## Benefits

By allowing supervisors to continually update agent skill ratings and routing callers accordingly, each customer call is routed to the best available agent for their specific need.

Whether the call comes from Automated Attendant, is routed by ANI or DNIS, or is simply transferred from another department, *Skills-based Routing* ensures that calls are routed based on the skill rating of available agents. What's more, with TFB's Screen Pop installed, screen pop information is maintained and presented to the agent regardless of which applications the caller transits.

### Benefits Summary

- **Improve staff effectiveness** by reducing time wasted on calls that don't suit the agent's skill set
- **Improve Customer Service** by getting calls to the most suitable, highest rated agent available
- **Centralize Agent Skill Ratings** for multiple departments/staff members



## Solution

The *Skills-based Routing* system is designed to allow administrators to specify and fine-tune routing of calls to agents with specific skill sets. As staffing levels change and agent expertise evolves, supervisors can easily upgrade agent ratings in specific skills. Agents get the right calls for their skill sets, and more importantly, customer calls are routed to the best available agent to handle their specific need.

### Vertical Market Application

*Skills-based Routing* delivers tangible benefits for call centers of all sizes. Any organization with a need to optimize agent effectiveness and improve customer service can benefit.

## Technical Specifications

*Skills Based Routing* is a software application that runs on TFB's *CTI Server* platform, a Pentium-based PC running Windows NT or Windows 2000. CTI Server uses Dialogic telephony boards, which provide the phone port interface to the switch, and ultimately the telephony connection between the application and call recipients. CTI Server is typically located in the switch room adjacent to the PBX, and is connected to the LAN.

### Requirements Summary

#### Switch Requirements

- NEAX 2000 or NEAX 2400 with ACD
- Reserved splits for routing scheme

#### CTI Server Requirements

- CTI Server Hardware Platform(s)
- Dialogic Ports
- TFB Automated Appointment Confirmation Application

#### *Optional*

- TFB Alarm Manager
- TFB ACD Reports
- Enhanced Call Center Routing
- Enhanced Automated Attendant



### Interaction with Other Applications

No two users have exactly the same requirements, but like all applications in Call Center Suite, Skill Based Routing fits seamlessly with other routing applications.

### Environment Assumptions

- Infolink available on NEAX 2000 or 2400

### Application Limits

By design, all system maximums generally exceed the requirements of practical applications.

| Application Maximums        |       |
|-----------------------------|-------|
| Maximum Skill Groups        | 100   |
| Rating Levels per Group     | 5     |
| Preference Levels per Group | 10    |
| Maximum Agents              | 1,000 |

| CTI Server Hardware Limits              |            |
|---|------------|
| Maximum Ports on first CTI Server       | 36 (24 T1) |
| Maximum Ports on subsequent CTI Servers | 48 (48 T1) |

## Purchase and Installation

The purchasing process is straightforward, and is done in partnership with a TFB sales representative. In general the steps are as follows.

- **Requirements evaluation**  
Determine and evaluate user's requirements, especially for customization of the application and for number of ports required to handle anticipated call volume.
- **Determine Time Frame for Production**  
Determine customers desired cutover schedule.
- **Purchase Order**  
User or dealer issues PO for Hardware, Software, and Labor as determined by requirements evaluation.
- **Installation and configuration**  
By arrangement, TFB may come on site to complete total turnkey installation, or TFB may install software remotely, working in partnership with the onsite telephony vendor.

List of Required and Optional Components

To thoroughly account for line items in a purchase the following list delineates all software, hardware, and labor components that are typically relevant to a purchase of *Skills-based Routing*.

| <b>HARDWARE</b>       | <b>Fee Structure</b>      | <b>Notes</b>                            |
|-----------------------|---------------------------|---|
| CTI Server            | Based on number of ports  | Specification available from TFB        |
| Port License Key      | Based on number of ports  |   |
| <b>SOFTWARE</b>       |                           |   |
| Skills Based Routing  | Based on number of ports  | Required, core application              |
| ACD Reports           | Based on number of ports  | Optional, provides enhanced reporting   |
| Screen Pop            | Quote based on evaluation | Optional, 'pops' application for agents |
| Alarm Manager         | Based on number of ports  | Optional, provides system alarms        |
| VF Edit               | Flat Fee                  | Required, provides editing of messages  |
| Text-to-Speech        | Based on number of ports  | Optional, to speak names of customers   |
| <b>LABOR</b>          |                           |   |
| Professional Services | Based on requirements     | To customize application                |
| Installation          | on-site or remote         |   |
| Message Recording     | Based on requirements     | Optional                                |
| Cutover coverage      | on-site or remote         | Optional                                |
| Project Management    | on-site or remote         | Optional                                |

Exact fees for each item are available from TFB. Note that CTI Server may be purchased through an alternate vendor provided TFB specifications are met.

### Installation and Cutover

Because TFB sells through authorized vendors, and our products are typically part of a switch installation, responsibility for project management, cutover, and configuration is often shared with the telephony or switch vendor.

TFB offers a range of on-site and off-site services to facilitate and manage the installation process. Services provided depend on the requirements and preferences of the end-user, and upon arrangements between the telephone switch vendor and TFB.



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