

Conversations v. 5.00 – What's New?

Release Overview

- » Feature enhancements
 - » Same Agent Callback in a Flex Environment
 - » Do Not Call List Enhancements
 - » Digital Recording Enhancements
 - » Command Post / Universal Server Enhancements
 - » Security Enhancements
- » Significant capacity modeling and infrastructure support
- » New functionality
 - » New Cisco/Geotel CTI Integration
 - » PowerCTI
 - » StrategyFlow – multi-channel vertical solutions

Feature Enhancements

- » Support of Same Agent Callback in a Flex Environment (target availability in 5.00 timeframe, not in 5.00 package)
 - » Allow agents (MOCA / Magellan) to create and schedule SACBs while flexed to inbound and on the phone with an inbound customer.
 - » When notification of an impending SACB call appears, flex the agent from inbound duty to outbound to handle the SACB call.
- » Do Not Call List Enhancements
 - » Ability to apply multiple DNC lists to a campaign
 - » Support for state based DNC lists
 - » Display date/time stamp for DNC entries

Feature Enhancements

» Digital Recording Enhancements

- » Added 'Account #' and 'Phone Number Dialed' fields
- » Added 5 additional user-definable fields that can be selected from the Screen Definition File (SDF)
- » Each user field can contain up to 30 characters

» Security Enhancements

- » Strengthen nterlude user security re file permissions
 - Removed world read/write permission from nterlude user executables.
- » Disable services not needed
- » Closed unused ports

Feature Enhancements

» Command Post / Universal Server

» New List Management Parameters

- User-defined recall count for Cancel Dial
- Customize call scripts by defining message to play to answer machines in list parameter
- Dynamically Control order in which phone numbers are dialed via Dial Sequence list parameter
- Maximum retry count parameter. Overrides value set in @MAXRET field in record.
- Add missing termination statuses to real-time reports (e.g.. AH, AA, etc.)
- Add Current Connection Length statistic to Production Monitor

Feature Enhancements

» Upgrade 3rd Party Software

- exceed 7.1, Sybase 12 [USVR, Cpost]
- Update Host Emulator Software Versions
 - Attachmate Extra 2000; WallData Rumba 2000, 7.0; WRQ Reflections 8.06

Capacity Modeling & Infrastructure Support

- » Verified ability to support up to 800 seats on a single universal server (IBM B80)
- » Verified support for numerous list/agent/hit rate configurations on both the small (IBM B50) and large (IBM B80) systems

New Functionality

- » Cisco/Geotel CTI Integration
 - » Blended Call Center Agents
 - Flex Defined by Progressive Business Rules
 - ICM Defines Agent Movement
 - Enterprise Agent View/Enterprise Routing
 - Move Agents to Calls Faster
 - » Consolidated Contact Center Reports
 - Real-time Agent State Statistics for Flex
 - Blended Agent Reporting

New Functionality

» PowerCTI

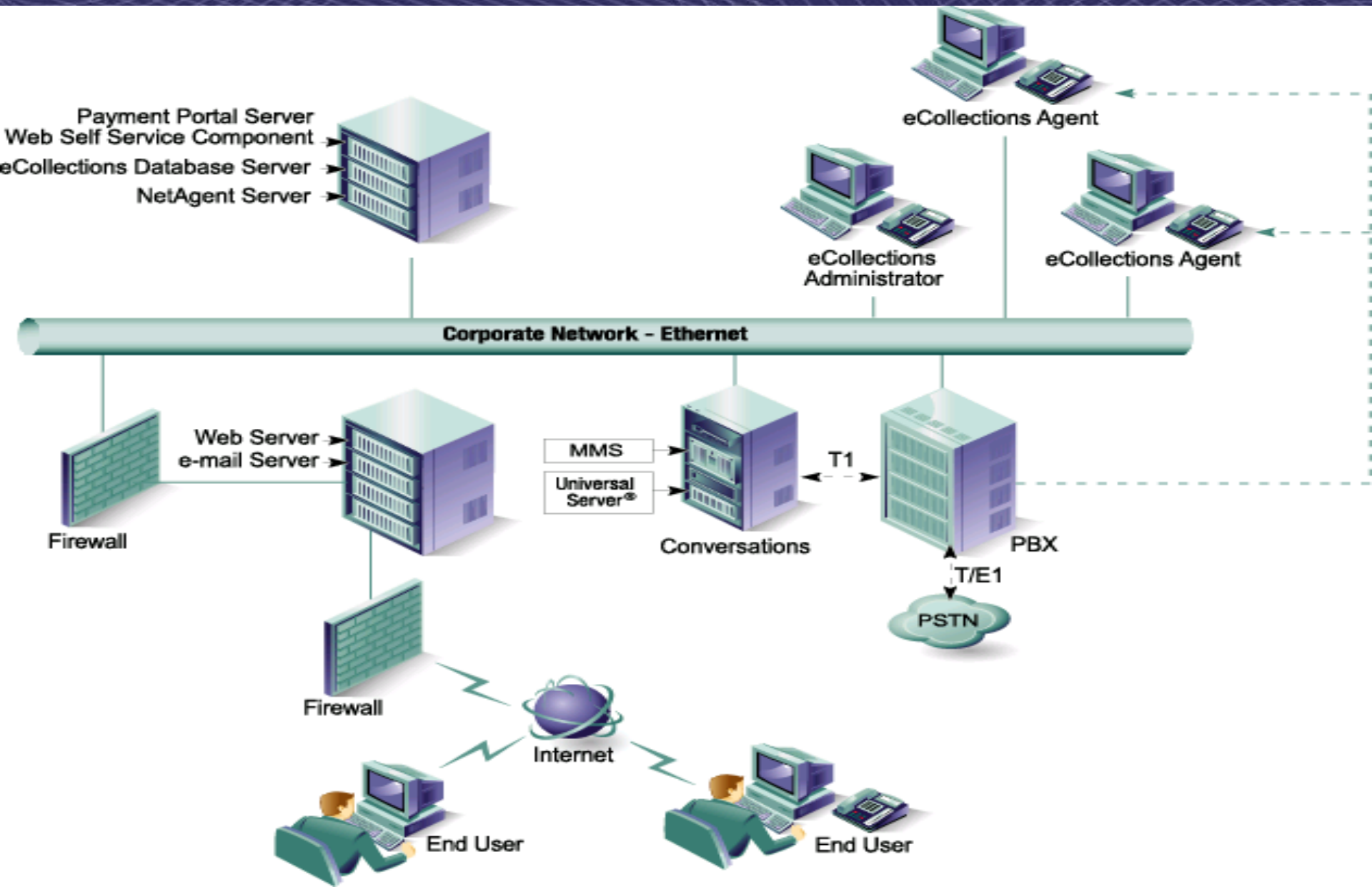
- » New CTI deployment architecture
- » Between Ultra and Action – Conversations provides call progress analysis but hands call back to PBX for Agent/Customer session
- » Leverages existing investment in PBX infrastructure and lowers cost of Conversations product

New Functionality

» Strategy Flow^(TM)

- » Template based system to provide vertical solutions
 - eCollections
 - eFraud
 - eSales
- » Multi-channel contact and response strategy management system
- » Increase effectiveness and reduce operational costs associated with communication intensive business processes.
- » Increase customer satisfaction and loyalty
- » Use business process and customer preferences to control how/when you contact customers and they respond

Strategy Flow Configuration



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StrategyFlow Enabled Vertical
Solutions - eCollections

Value Proposition

- » Typical collections transaction costs average \$7.50 for contact and payment processing.
- » Using Strategy Flow, overall interaction processing costs can be reduced to \$2.50 and inbound calls volumes decreased by 25%.
- » Would you like to know more?

Business Objectives

- » Leverage new technologies to improve customer contact method efficiencies
- » Increase profitability by reducing agent resources and increasing contact rates
- » Reduce the cost of processing assisted service interactions
- » Reduce the number of inbound calls associated with the collections process
- » Maximize existing Conversations operational procedures and processes

Solution Summary

- » Create an internet-enabled environment for collections that provides an optimized multi-channel StrategyFlow™ for the interaction management process
- » Provide self-service portal processing capability for both visiting customers and agents
- » Satisfy customer communication needs utilizing lower cost collaboration and e-mail channels

How Many Do It Today

» Notification channels

- » External - i.e., postal mail dunning letters or messages in statements
- » Outbound dialing collection campaigns

» Response channels

- » Inbound calls to make promise to pay or payment
- » Postal mail with payment

With Strategy Flow™

» Notification channels

- » Integrated multi-channel strategy including outbound voice, inbound voice, e-mail, web chat, web callback and postal mail
- » Business rules-based channel contact strategy customized to each customer segment

» Response channels

- » Integrated inbound contacts - web chat, e-mail, voice, postal mail - to make promise to pay or payment
- » Self service payment portal

Professional Services Needed

- » Phase One - Business analysis and assessment
 - » Contact Strategy Business Process Assessment and Development,
 - » Technical Architecture Assessment,
 - » Web Site Assessment,
 - » Implementation and Test Planning
- » Phase Two - Implementation
 - » Portal Development, Installation and Configuration,
 - » Multi-Channel Advisor Workstation Installation and Configuration,
 - » Contact Strategy Design, Installation and Configuration,
 - » Operational Procedure Development and Documentation
 - » Training

Software Services Needed

- » Existing Products - New Revisions Required
 - » Conversations 5.00
 - » Magellan 5.00 or MOCA 5.00
 - » NetAgent 6.00 – CHAT & EMAIL
- » New Products Needed
 - » Conversations Strategy Flow™ Module (separately licensed module first available in v. 5.00)
 - » eCollections™ Web Payment Portal Server
 - » divine Self-Service (optional)
 - » divine SoftMetric (optional)

Other Vertical Solutions

» Coming Soon

- » eFraud
- » eSales
- » eMarketing

Conversations Product Roadmap

Conversations 3.X EOL

- » Campaign initiates once 5.00 is GA – April '02
- » Customer notification letters will be produced
 - » MUST be delivered to cover us legally
- » Customers on current maintenance contract have a 90 day notification clause
 - » Those contracts expiring in less than 90 days may renew maintenance on PF3.X system for one additional year
 - » Those contracts expiring in 90 days or greater must migrate and renew on the new maintenance contract before the 90 day window expires
 - » Customers on multi-year agreements will have those honored to the end of their initial contract term

Roadmap – Conversations 5.10

- » Telezapper
- » Aspect Portal Support
- » Minor Feature Updates
- » Defects
- » Target 3Q02 Beta & GA

Roadmap – Softmetric Integration

» Two Phases

» Phase I – Basic Integration

- Nightly dump of Conversations data
- Softmetric deploys with standalone value proposition, pricing, etc.

» Phase II – Integrated reporting for Strategy Flow

- Provides unified reporting for the eVertical solutions
- Stock campaign reports productized
- Packaged pricing w/ up-sell to standalone Softmetric

Roadmap – Universal Server Port to Linux

- » Required for Dell Contract to be delivered by March '03
- » Move from AIX to Linux (Redhat?)
- » Support for RS6000 and Dell/Intel H/W
- » New GUI for Command Post (possible)
 - » Web Based
 - » No X11
- » Enhanced Security (possible)
- » Target 1Q03 GA

Roadmap – MMS2

- » Move from ISA to PCI
 - » Single card vendor (target Intel)
 - » Single quad-span card (no separate DSP, conferencing)
- » Move to a more “commercial” platform
 - » Off the shelf server
 - » Always duplex w/ redundant power/fans
- » Simplify installation/maintenance
 - » XML file based configuration (no registry)
- » Modeling in progress, probably a “small” and a “large” platform
- » Target 2Q02 Beta & 3Q02 GA

Roadmap – Web Based Agent Desktop

- » Web based workflow and data access system (e.g., web based Magellan)
- » Probably based on/extension of MOCA
- » May be two phases
 - » Phase I – reference MOCA implementation for collections
 - » Phase II – workflow editor system
 - » Target delivery not defined yet

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Roadmap – Conversations 5.10

- » Telezapper Support
- » Aspect Portal Support
- » Minor Feature Updates
- » Defects
- » Target 3Q02 Beta & GA

2002 Scheduled Development

» SoftMetric Integration

- » Phase I – Business Analytics for Conversations, to be launched with Conversations 5.00
- » Phase II – Detailed Analytics for Strategy Flow, to be launched with Conversations 5.10

» Web Based Desktop

- » Web based workflow and data access system (e.g., web based Magellan)
- » Based on Web Services Architecture
- » May be two phases
 - Phase I – reference MOCA implementation for collections
 - Phase II – full web based workflow editor system

2002 Scheduled Development

» MMS 2

- » Move from ISA to PCI
- » Move to a more “commercial” platform
- » Simplify installation/maintenance
- » Modeling of deployment footprint in progress, looking for feedback on port sizings

» Universal Server Linux Port

- » Move from AIX to Linux (Redhat?)
- » Support for RS6000 and Dell/Intel H/W
- » New GUI for Command Post
 - Web Based
 - No X11

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Summary

Conversations 5.0 Summary

- » Numerous customer needs-driven feature enhancements
- » Exciting new CTI options
- » Integrated multi-channel customer interaction management now available

Next Steps

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Thank You

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