PCS
PALITTO CONSULTING SERVICES

After Call Survey

Updated 10/2020

Content

Learn more about maximizing your Mitel phone system →

About PCS

Business technology is our passion and serving the business community is the motivation behind each of our services. For well over two decades, Palitto Consulting Services has offered custom technology solutions to Fortune 100 and small businesses alike. The PCS team of experts have logged over 100,000 developer hours producing an extensive set of key integrations and custom software solutions in addition to providing numerous LAN/WAN communication services.

At PCS we do not have a "one size fits all" approach; we strive to provide customers with a custom solution tailored to best fit their unique business needs.
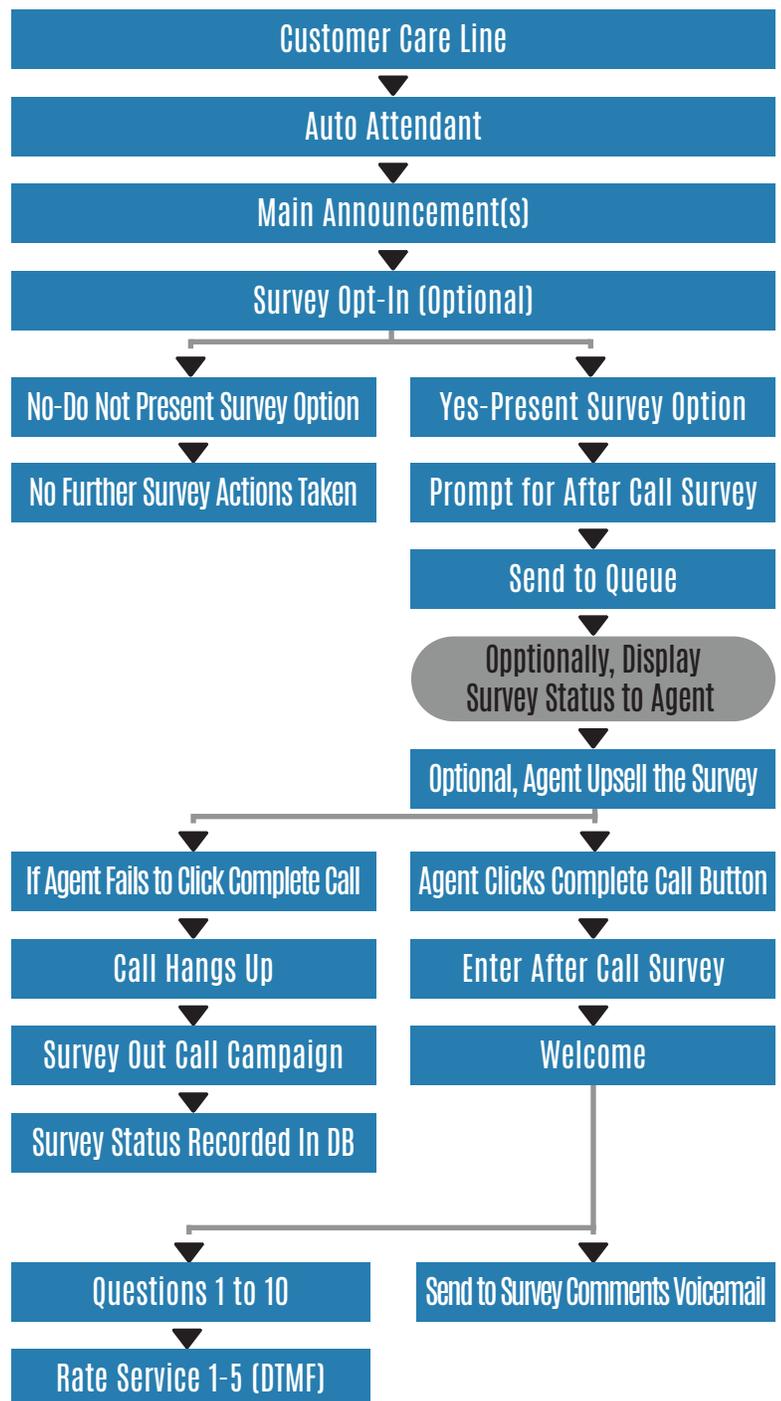
• PCS began working with the Mitel (then ShoreTel) platform in 2002; we have over 100,000 hours of development time

• PCS team is Mitel Certified in both Installation and Support of MiVoice, MiCloud and MiCC

• All of our team members reside in Ohio

• Our project history ranges from one location sites to large deployments with sites that span several states or countries

PCS Strives to be a World Class Partner's Best Partner!

Solution Architecture

There are several components available for the After Call Survey Integration. Including:

- Survey management and reporting from the contact center interface
- Creation of one survey script with up to ten questions
- Implement system to auto transfer callers to surveys without agent intervention
- Advanced reporting database to support external reporting tools
- Email alerts for low customer satisfaction responses

Customer Care Line
↓
Auto Attendant
↓
Main Announcement(s)
↓
Survey Opt-In (Optional)

No-Do Not Present Survey Option / Yes-Present Survey Option

No Further Survey Actions Taken / Prompt for After Call Survey
↓
Send to Queue
↓
Opptionally, Display Survey Status to Agent
↓
Optional, Agent Upsell the Survey

If Agent Fails to Click Complete Call / Agent Clicks Complete Call Button

Call Hangs Up / Enter After Call Survey

Survey Out Call Campaign / Welcome

Survey Status Recorded In DB

Questions 1 to 10 / Send to Survey Comments Voicemail

Rate Service 1-5 (DTMF)

Content Configuration

The management interface allows you to set up survey questions by language. Each language is configurable to present unique question sets for that language survey. The questions sets are configurable for number of questions and order of presentation. Questions can be one of two styles: DTMF Response and Voice Memo.
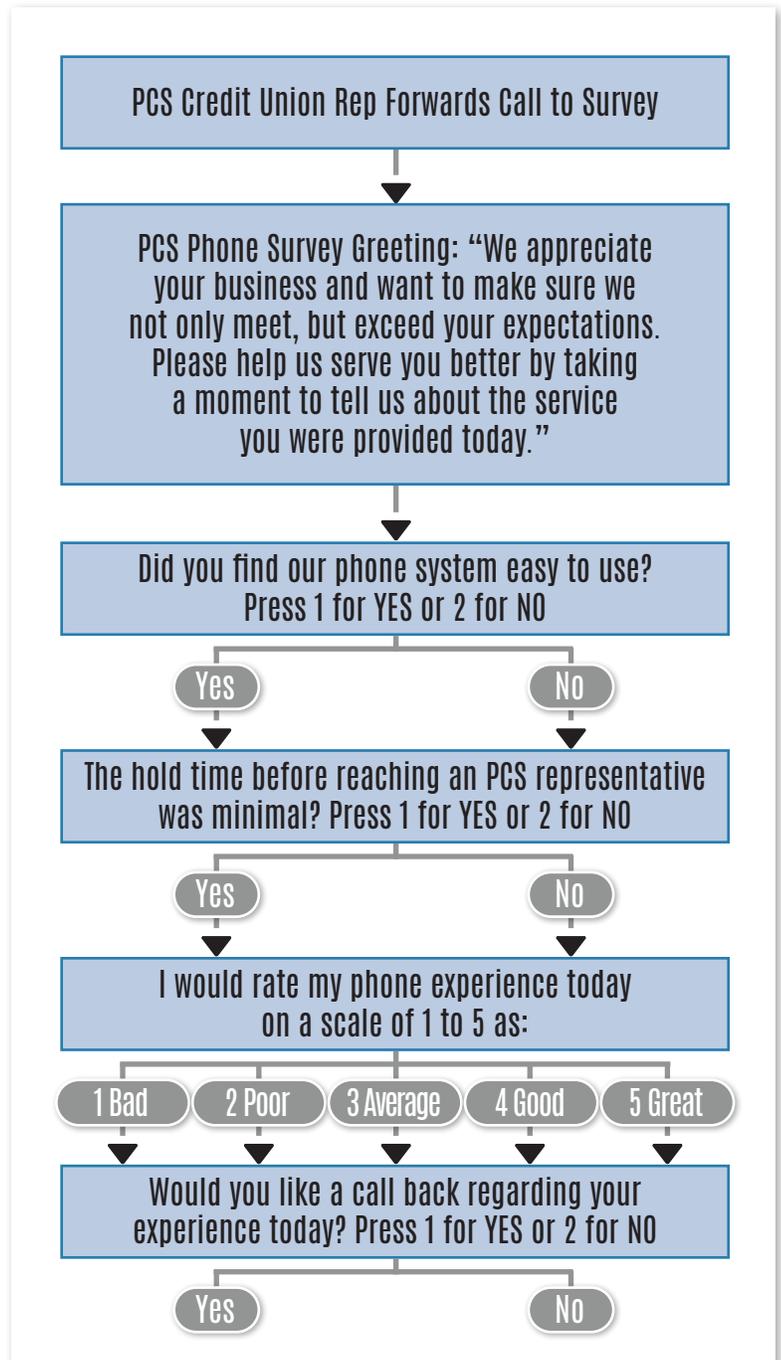
DTMF Response Questions

Supports keypad DTMF responses of 0 through 9. The configuration allows the administrator to define valid responses. Responses will be recorded in the survey database schema.

Voice Memo

Supports audio memo responses which are recorded and attached to survey responses.

Multi Language Support

The survey system supports up to 15 languages. The language will be selected based on the IVR language used during the call. Generally projects only include scripting and setup for English only. PCS can assist with additional languages on an hourly rate basis or provide fixed price quoting as a future project.

PCS Credit Union Rep Forwards Call to Survey

PCS Phone Survey Greeting: "We appreciate your business and want to make sure we not only meet, but exceed your expectations. Please help us serve you better by taking a moment to tell us about the service you were provided today."

Did you find our phone system easy to use? Press 1 for YES or 2 for NO

Yes   No

The hold time before reaching an PCS representative was minimal? Press 1 for YES or 2 for NO

Yes   No

I would rate my phone experience today on a scale of 1 to 5 as:

1 Bad   2 Poor   3 Average   4 Good   5 Great

Would you like a call back regarding your experience today? Press 1 for YES or 2 for NO
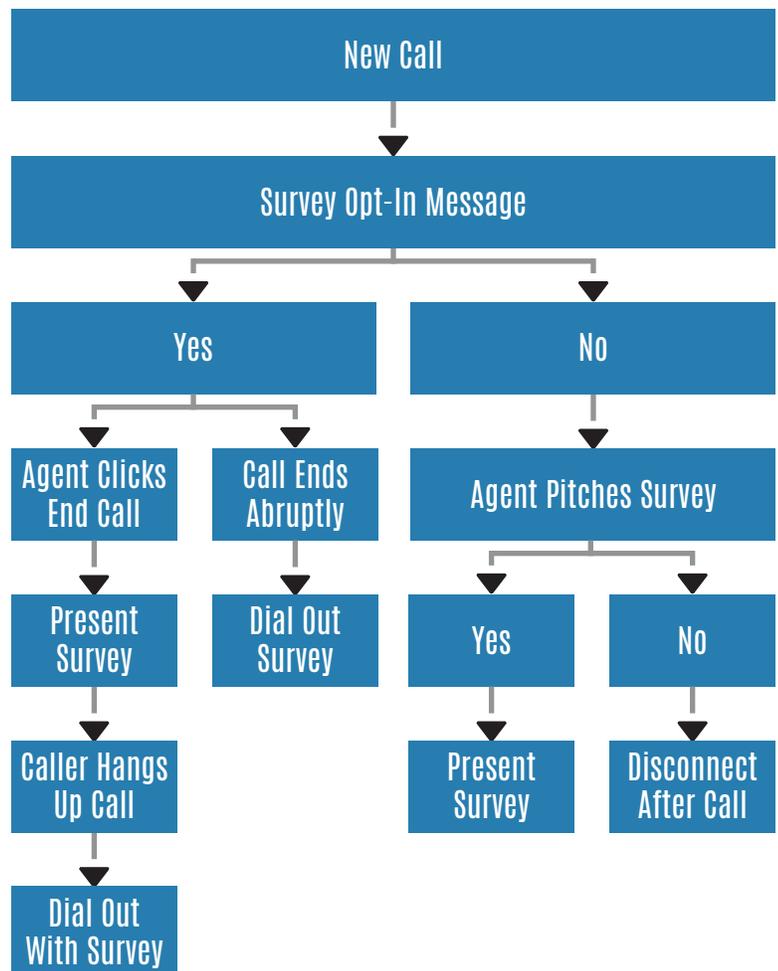
Yes   No

Opt-In

Provides the ability to request feedback from the caller to determine if they want to participate in the after call survey. This will be implemented by using an auto attendant to prompt the caller before entering into a workgroup. If the caller selects to take the after call survey, a call property will be set that the PCS Hang-up Monitor will monitor. An optional feature is to have the status of customer survey status to be completely hidden from the agent.

Call Flow

The call flow diagram, on the right, shows the call flow decision points that determine when a survey is presented to a caller.

Upselling

When agents receive calls, they will see an indicator in Mitel if the client has been offered a survey and opted-out. The indicator is displayed in the call information area as seen in the screen shot below. The agent will be able to pitch a survey upsell and then set up the survey by simply clicking the "Add Survey" toolbar button.

```
                    ┌─────────────────────┐
                    │      New Call       │
                    └─────────────────────┘
                               │
                    ┌─────────────────────┐
                    │ Survey Opt-In Message│
                    └─────────────────────┘
                       │               │
                ┌──────────┐      ┌──────────┐
                │   Yes    │      │    No    │
                └──────────┘      └──────────┘
                 │        │            │
        ┌────────────┐ ┌──────────┐ ┌──────────────────┐
        │Agent Clicks│ │Call Ends │ │Agent Pitches     │
        │End Call    │ │Abruptly  │ │Survey            │
        └────────────┘ └──────────┘ └──────────────────┘
             │             │          │            │
        ┌─────────┐  ┌──────────┐ ┌────────┐ ┌────────┐
        │Present  │  │Dial Out  │ │  Yes   │ │   No   │
        │Survey   │  │Survey    │ └────────┘ └────────┘
        └─────────┘  └──────────┘     │          │
             │                   ┌─────────┐ ┌──────────┐
        ┌───────────┐            │Present  │ │Disconnect│
        │Caller Hangs│           │Survey   │ │After Call│
        │Up Call     │           └─────────┘ └──────────┘
        └───────────┘
             │
        ┌───────────┐
        │Dial Out   │
        │With Survey│
        └───────────┘
```

Call Control

Routing

Surveys can be routed based on specific DNIS numbers, caller ID, or IVR entered data. This advanced survey option will provide capabilities to offer surveys to specifically targeted customer groups and provide flexibility to the questions asked based on caller information.

Survey Outbound Dialing

Survey Outbound Dialing is an automatic survey transfer script that runs when the agent clicks the "Call Complete" button. This script will automatically transfer the caller into the survey without the agent taking any action or having capability to cancel the survey.

An optional feature available is administering surveys through outbound campaigns. These campaigns immediately call out to a client after hanging up and administer the survey. The outcall survey can be set up in conjunction with automatic survey transfers so any calls that are terminated abruptly, will receive an outbound call to administer the survey.

Reporting

Basic Reporting

Reports are available in the contact center or within the PCS Custom Reporting Portal, with the ability for viewing survey result reports by agent and by queue.

Audio Comments

Survey respondents have the ability to leave audio comments with their survey responses. These comments are stored in WAV audio format and a file path is attached to the survey response reporting records. This architecture includes a link to listen to the audio file in the reporting interface.

Email Alerts

Email alerts can be configured to trigger when customer satisfaction responses are below threshold. The recipients and thresholds will be configurable from the Application Configuration file.

Queue Survey Detail Report Sample

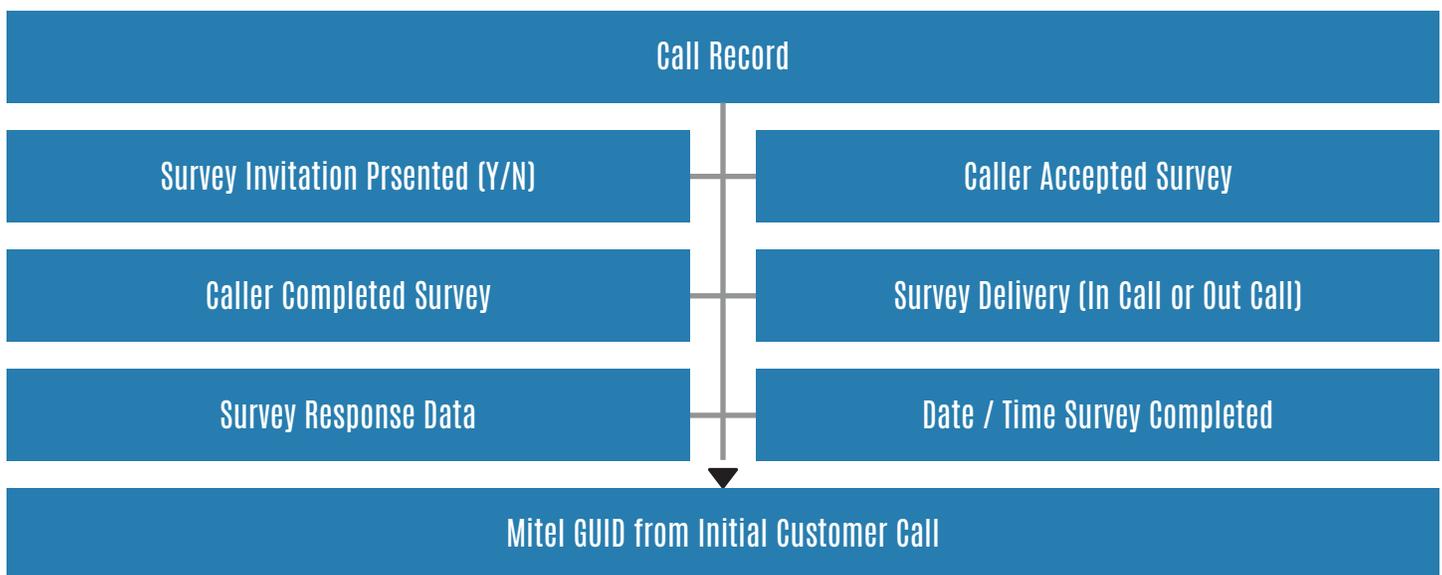From: 7/27/2015 to 7/28/2015
For Queue: 129

Agent Name	Agent#	DNIS	Caller ID	Caller ID Name	Time	Duration	Q1	Q2	Q3	Q4	Survey VM
07/26/2015 (Mon) Queue 1 (129)											
Doe, Jane	190	330-555-1212	330-414-6470	Tom Johnson	8:15	15:20	1	2	3	4	N/A
		330-555-1213	330-414-6471	William Smith	8:15	15:20	-	-	-	-	-
Jones, Susan	143	330-555-1212	330-555-9999	Sally Lee	9:02	1:15	2	3	4	5	Play
					17:17	16:35		TBD			
Grand Totals					17:17	16:35		TBD			

Advanced Reporting

Analysis by agent, by queue, and advanced analysis is provided in the optional advanced reporting module.

Survey reporting will be provided through contact center reporting tools and interfaces. Data will be recorded in a SQL database separate from the contact center database for all survey data attributes. The data can be locked down to prevent unauthorized changes within the security structures set up in contact center. All reports will provide an export option to CSV or Excel.

Here is a summary of the call survey data PCS will collect and store in the SQL database:

Call Record	
Survey Invitation Prsented (Y/N)	Caller Accepted Survey
Caller Completed Survey	Survey Delivery (In Call or Out Call)
Survey Response Data	Date / Time Survey Completed

Mitel GUID from Initial Customer Call

Custom Reporting Data

PCS will provide custom reporting data to reporting managers with the following information:
• Survey Response Results
• Survey Response Rates
• Survey Database Schema

Survey Response Results:

Reports will be available for survey question responses summarized by the following metrics:
1. Specific Date Range
2. Day of Week
3. Caller Country
4. Language
5. Agent
6. Call GUID

Survey Response Rates:

Reporting metrics are determined for customers response to survey invitations and response quality. The following metrics will be covered in PCS Survey reports.
1. Invitation Rate – Total vs. Calls Offered Surveys.
2. Response Rate - Surveys Accepted vs. Completed.
3. Incomplete Rate – Surveys Accepted vs. Started but not completed.

Survey Database Schema:

The survey database will warehouse the survey results in a flexible schema built for performance and simple maintenace of future survey question updates.
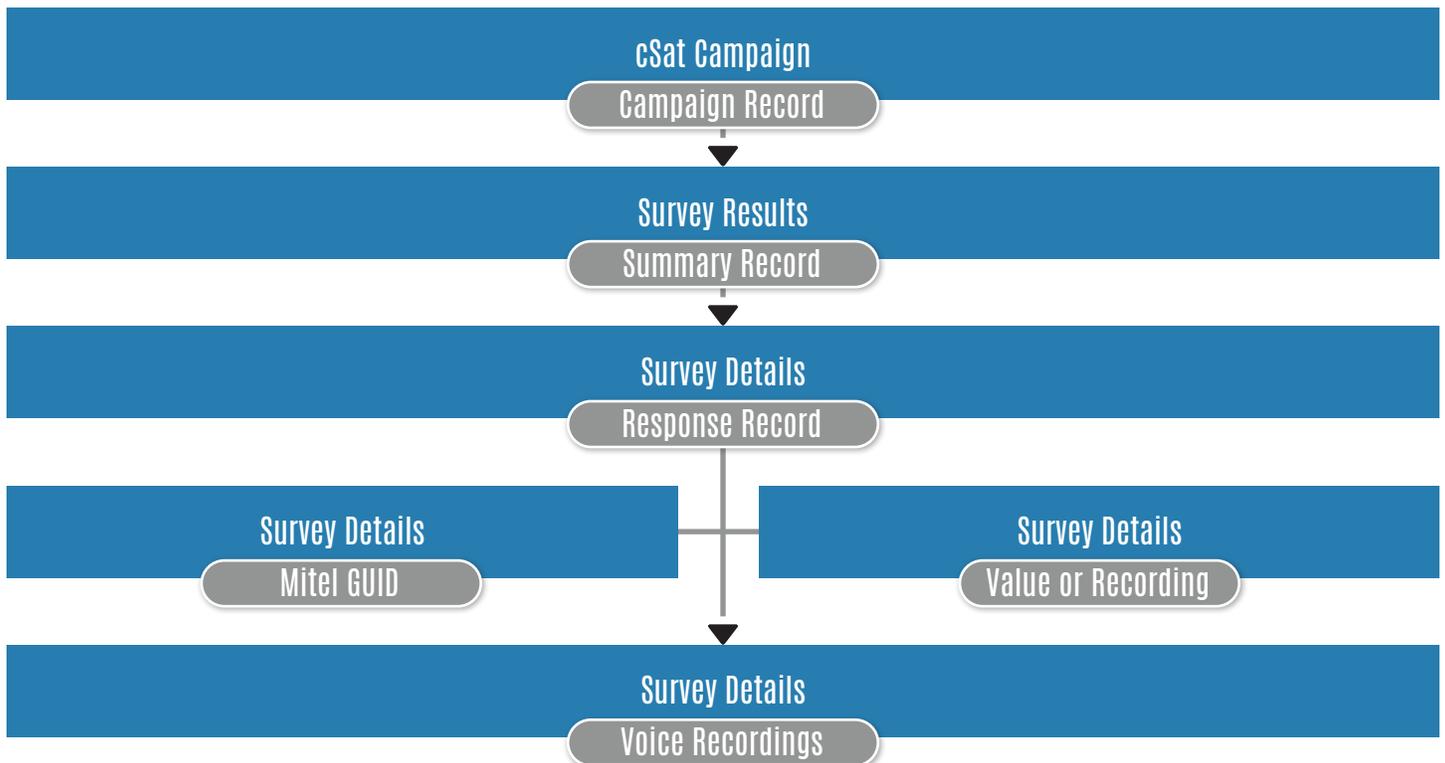
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