

System Health Check Sample Report

Updated 9/2016

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Learn more about our system
health check procedures



Statement of Work

- PCS to work with John Doe on Contact Center needs per list of issues provided by Company.
- PCS to address concerns and give recommendations on how to better use the contact center system to better meet the needs of Company.
- PCS to travel to Company's Cleveland site for Contact Center system review and meetings with key Call Center and network personnel.
- PCS to provide a block of time for remote work after initial onsite visit for follow up and outbound dial list work.

Visit Details:

Day 1:

- Met with John Doe
- Met with Jane Smith
- Focused on Call Center call routing and Reporting

Day 2:

- Met with John Doe
- Met with Jane Smith
- Met with Tom
- Focused on Reporting. Meeting with John, Jane and Tom for site visit recap.

On Site Agenda

1. Reports
2. Agent wall board / agent manager
3. Wrap codes and release codes
4. Auto Attendants
5. Monitoring – best practices
6. Overflow and Interflow
7. Skill based routing
8. Additional license where needed
9. Dial lists and auto call backs
10. Work from home set up
11. Work Force Management
12. General understanding of best practices
13. General server health info

Agenda With Action Items

1. Reports

Both in the PBX and Contact Center. Customize reports for our needs. Better understand the potential of reports, scheduling reports, and exporting data.

Worked with John on Contact Center reports and creating and running templates in Contact Center. Also worked on the PBX side and determined a couple new reports John could run to isolate certain calls. Discussed User detail and Workgroup service level reports. Tested scheduling a report template, report generated as is should be, test OK.

Action Item:

John is to work on creating templates and schedules for reports as he determines what he wants to schedule.

2. Agent Wall Board / Agent Manager

Downloaded software and trial key for agent dashboard.

Action item:

Jane is to create new Virtual Machine.

3. Wrap Codes and Release Codes

How we use them and what we would like to do.

Discussed this at length with John, currently use Google Docs. Researched and found only one wrap code per call. Google app seems to be the best solution for Sample Company's needs.

Action Item:

Sample Company to continue using Google docs for call tracking

4. Auto Attendants

Look at how we use them and to scale so it is manageable

Discussed this at length with John and Jane, determined John does need to use multiple AA menus because of multiple entry and exit points into and out of the system. Discussed

streamlining call flow as much as possible to minimize programming where possible, mentioned reusing as many AA menus as he could as one approach.

Action Item:

John to review business practices and try to determine, how much if any, AA menu consolidation can be made.

5. Monitoring

Best practices. We currently struggle with what we think we have.

No “camp on” feature available in the VoIP system. Supervisor recording agent call(s) must wait for agent to be on the phone before recording or monitoring. Discussed installing call recorder for testing always on recording for all agent phones

Action Item:

Jane is to build a server for this testing. (Same server as in item 2 above).

6. Overflow and Interflow

We have something in place but is there better?

Discussed this at length with John and Jane, decided adding additional Contact Center agents and overflowing to these new agents would be better than the current interflow to the work group. To enable quick “closed” call flows main services should setup with the no agent destination pointing to be overflow group. This would allow the primary Call Center agents to logout and automatically force the calls to the overflow group.

Action Item:

John and Tom to review license costs and determine if they are going to proceed with creating an overflow group and change call flow to reflect new group/users. Additional agent licenses needed for these users as they are now work group agents.

7. Skill Based Routing

Don't really take advantage of

Decided since skills are not enforced and cannot be reported on (yet) it would be best to use group list order to route calls at this time. Sample Company may look into this further if Contact Center version 9 enforces skills and allows reporting on skills routing.

Action Item:

No action item at this time.

8. Additional Licenses Where Needed

Discussed with John the need for additional IVR ports, Sample Company needs 33 additional IVR ports now to prevent a “dead air” situation on incoming calls during busy times. Discussed purchasing additional agent licenses for over flow agents that are currently configured as work group agents to streamline call flow and reporting. Need Agent Dashboard license.

Action Item:

John and Tom are to review license costs and determine how to move forward.

9. Dial Lists and Auto Call Backs

Don't use currently

Discussed this some with John, determined the need more info on DB's involved and the needs. Dial lists will be part of the offsite work with either Bill or Marvin. Setup and tested call back option, showed John where/how to enable in call flow.

Action Item:

Schedule call with PCS programming team and Sample Company to determine outbound dial details.

10. Work from Home Set Up

Discussed at length with John and Jane, touched on all possible options the VoIP system offers, External assignment, VPN device and hard phone, Client VPN and softphone and VPN concentrator and hard phone as possible solutions for remote office users. Not an action item at this time as there needs to be more discovery on the impact to I.T. in supporting remote users.

Action Item:

No action item needed at this time. Cost was a concern as well as the additional load on the I.T. staff. Work from home does not appear to be a viable option for Sample Company at this time as the ROI is not there to justify the investment.

11. Work Force Management

Scheduling/breaks/lunches/resource reallocation

Discussed VoIP system “staffing” John is looking for a more proactive solution. Sample Company already has numbers in the Contact Center system for staffing. They can pull reports against these setting to see if they were over or under staffed at any time. John would like proactive forecasting of staffing needs. Decided a 3rd party solution would be best at this time as Contact Center does not offer this natively.

Action Item:

John is to look into other 3rd party options for staff forecasting.

12. General Understanding of Best Practices and How We are Set Up

Likely not using some bells and whistles

Discussed and decided the interflow settings were the biggest thing that could be improved. Email and CHAT are not needed/wanted at this time.

Action Item:

Discussed CHAT and Email in Contact Center but decided that at this time there was no need to go down these paths. No action item needed for this topic.

13. General Server Health Info

Looked over the server and discussed this with John and Jane. They are already doing “best practice” on patching and AV. Did find missing Windows roles on Contact Center server.

Action Item:

Recommended Jane to install the roles to match the VoIP system HQ server as the HQ server is setup properly.

Next Steps

1. Work with John and Jane on setting up Call Recorder and Agent Dashboard (possibly demo both systems for now)
2. Schedule off-site meeting with Sample Company and PCS to review Outbound needs.

Summary

- PCS found that Sample Company's Contact Center system was setup overall adequate.
- PCS would recommend at the very minimum adding 33 IVR ports to help prevent busy time "dead air" calls (IE: a call that cannot access an Contact Center IVR port will hear dead air instead of queue announcements and MOH).
- PCS recommends changing the Interflow condition to Overflow. This will allow more streamlined call routing and reporting.
- PCS recommends the "no Agent" destination to be setup as the CodeRed! group (currently a work group). This will allow a simple and automatic way to route calls when the main Call Center agents are not available.

Consulting Services

Additional support can be provided at an hourly rate, billed as used in 15 minute intervals. All support can be provided via email or telephone, and remote connectivity as deemed necessary by PCS.



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