



Case Studies - Call Centres

The WorkScript Process Wizard is process improvement and on-the-job support software that empowers anyone in your organisation to perform any process as accurately and efficiently as the expert - without the expert being there.

The Wizard helps ensure that your call centre staff deliver quality customer service, making decisions based on fast access to the applications, knowledge and resources of the organisation in the context of the call. It also reinforces compliance with regulatory and quality standards, and is fully supported by audit trails and management reports.

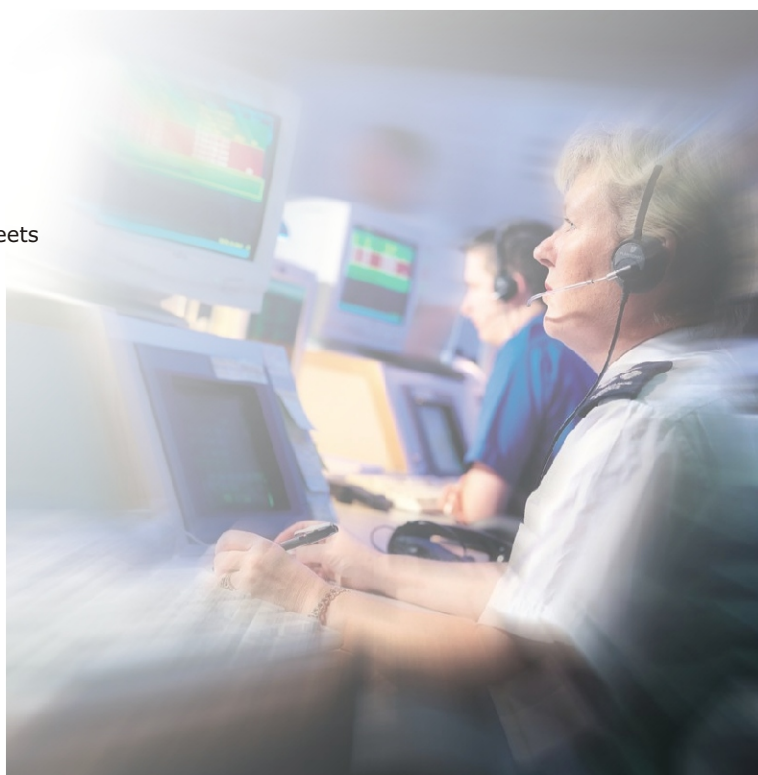
Case Study 1- Outbound: Telco Call Centre

- Requirement:** Capture, map and document the (outbound telemarketing) subscription renewal process.
- Problem description:** Customers had not renewed over \$500,000 worth of advertising subscriptions and a concerted effort was required to win back this business. Staffing levels were such that none of the existing internal staff could be released for this assignment. It was decided to use temporary staff from a recruitment agency to assemble a taskforce.
- Solution:** The renewal process was captured and mapped into the WorkScript Process Wizard within one week and the software made operational on the company's intranet. Eight temporary staff were hired for the project and given two days training on the client's product and a two-hour training session on the use of the Process Action Pages for the renewal process using the Wizard. The project was scheduled for an eight-week duration.
- Results:** The project was a significant success. Approximately \$300,000 of the business was recaptured. The temporary staff found the Process Action Pages very easy to use (becoming productive within two days of sign on) and all feedback on the WorkScript Wizard was highly enthusiastic. They particularly commented on the intuitive interface and the ease of access to supporting applications and information.

Typical Call Centre procedures supported by the WorkScript Process Wizard

Subscription renewals

- ◆ [Data Management](#)
 - ◆ Process Sales Sheet
 - ◆ Receive Hotline Query
 - ◆ Record Sales Sheet Details
 - ◆ Verify Data Entry QC
- ◆ [Canvass Preparation](#)
 - ◆ Create Renewal Contracts & Sales Sheets
 - ◆ Manage Rollover Book
- ◆ [TeleSales Renewals](#)
- ◆ [Face to Face Renewals](#)
- ◆ [Confirm Renewals](#)
 - ◆ Process Contract
 - ◆ Verify Sales Sheet
 - ◆ Back Office Processes
 - ◆ Call Centre Processes
- ◆ [Produce Case Data File](#)
- ◆ [Management Reporting](#)



Case Study 2 - Inbound: Sporting Wholesaler Call Centre

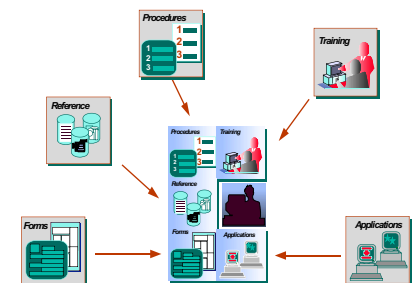
- Requirement:** A more disciplined approach was required of the customer service processing staff to capture important order processing information as well as to correctly process such transactions.
- Problem description:** The order management process was quite complex as it required a number of interactions with back-office systems including SAP. Implementation problems with SAP were perceived to compound the complexity of the order cancellation process. The company was accepting order cancellations were averaging \$1M per month. This was primarily caused by staff not understanding the company's return policies or how to correctly handle a return/cancellation request from a client. SAP management reports for the area suffered from the garbage in garbage out syndrome and were very frustrating to the operational managers. Over 40 percent of Customer Service staff were new (less than 6 weeks in the job) and the order management process was undocumented. Training was done on the "buddy" system where an experienced user would look after a number of new employees as they became familiar with the job. The difficulty arose when there were not enough trained staff to act as buddies.
- Solution:** The process was mapped in detail and loaded into the WorkScript Process Wizard along with appropriate training resources, cancellation rules/policies and links to SAP and other back end systems. The Wizard then generated Process Action Pages for the process. Circumstances did not allow any formal training of the users to be conducted before going live with the system.
- Results:** Within two days, staff had "internalised" the process and were confident when using the system. Almost three million dollars of orders were saved from cancellation in the first six weeks of the Wizard operation. Management reports from SAP began to make sense and the additional reporting metrics provided by the WorkScript Process Wizard gave managers much more operational control. No further training of the users has been necessary.

System Description

The WorkScript Process Wizard is a process improvement, on-the-job support and performance management system. Use the Wizard to create a visual representation of a process, and then generate interactive Process Action Pages for your company's Intranet or website.

Staff can then use the Process Action Pages to perform their work tasks. The Wizard is most suitable for knowledge workers, that is people regularly required to solve problems; people who spend the bulk of their time engaged in reasoning activities such as collecting data, weighing evidence, recognising patterns, drawing inferences and making deductions. They often use multiple systems to solve a given problem or coordinate multiple tasks.

The Wizard's Process Action Pages support these people in completing any business process or transaction by providing guidance on the steps to be performed; the IT tools (including Microsoft products, SAP, Oracle, etc.) to be used, and embeds knowledge resources (policies, procedures, hints and other business rules) for each step within a process. This ensures that each transaction is processed by performing agreed steps using nominated tools. It also reduces the amount of rework due to errors and increases compliance with approved processes.



Typical call centre procedures supported by the Process Wizard

Quotation, Bid & Sales Order Management

- ◆ **Order Acquisition**
 - ◆ Pre-approval bid process
 - ◆ Prepare Tender or Proposal
 - ◆ Generate Quote
- ◆ **Sales Order Processing**
 - ◆ Process quotation
 - ◆ Create sales order
 - ◆ Receive order confirmation
 - ◆ Process Cancellation
 - ◆ Deliver products
 - ◆ Send invoice
 - ◆ Track order status

Prove the value of the WorkScript Process Wizard to your organisation by conducting a proof-of-concept with the Wizard in a critical or complex area of your business. A proof-of-concept is inexpensive, and may be one of the most important decisions you make about the future of your business.

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