



Calls strategies

v5.0a

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Part 1
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Foreword

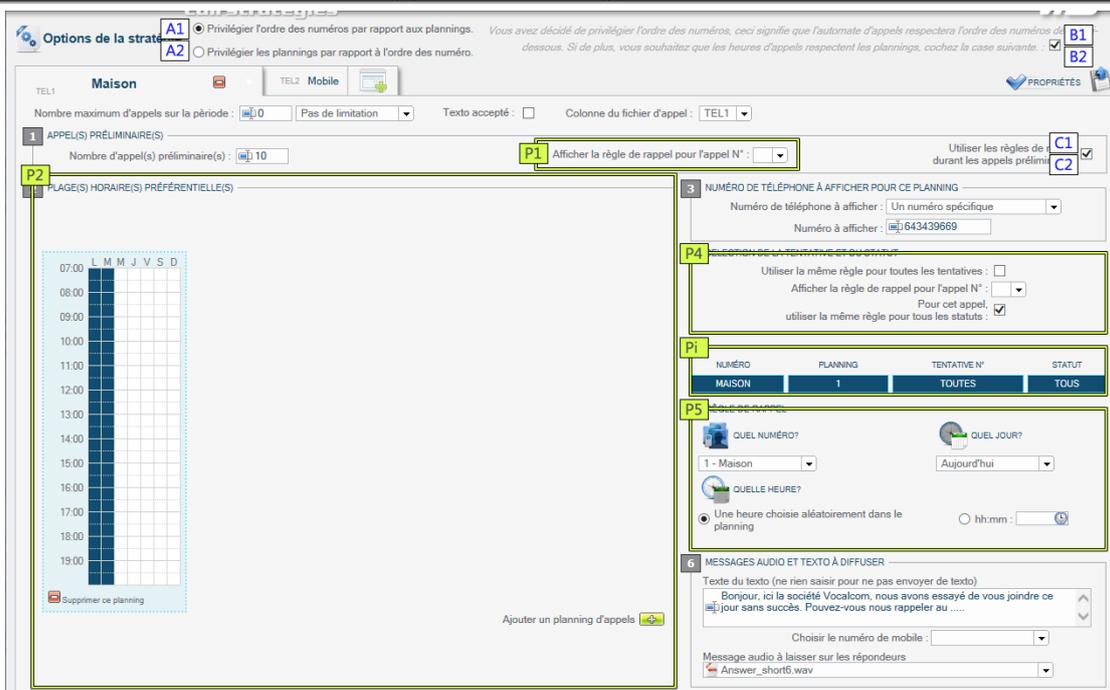
The main goal of the strategies is to allow calls to make contact with a prospect or client in the fastest way possible. This new system implemented in the Hermes.Net dialler, will allow you to make all sorts of strategies!

Strategies will be classified under two distinctive forms:

- Strategies need to respect the order of call numbers defined.
For example, we really do not want to call on the mobile if we did not try 5 times at home.
- Strategies need to respect the schedules defined numbers.
For example, We absolutely do not want to call on the mobile during office hours.

This concept is very important and can separate strategies into two types.

1. Different states of the type of strategy chosen interface.



Indicative screenshot. Does not represent a possible state.

According to the three selectors indicated (A1, A2, B1, B2, C1, C2), the state of the interface changes (see table below).

				P1	P2	P4	Pi	P5
A1 - Privilégier l'ordre des numéros								
B1 - Respecter les plannings								
	C1 - Utiliser les règles de rappel durant les appels préliminaires	1	N	O	O	O	O	O
	C2 - Ne pas utiliser les règles de rappel durant les appels préliminaires	2	O	O	N	N	N	N
B2 - Ne pas respecter les plannings								
	C1 - Utiliser les règles de rappel durant les appels préliminaires	3	O	N	O (*)	O	O	O
	C2 - Ne pas utiliser les règles de rappel durant les appels préliminaires	4	N	N	O (**)	N	N	N
A2 - Privilégier les plannings								
	C1 - Utiliser les règles de rappel durant les appels préliminaires	5	N	O	O (*)	O	O	O
	C2 - Ne pas utiliser les règles de rappel durant les appels préliminaires	6	N	O	O (**)	N	N	N
	(*) Les messages affichés en partie 4 deviennent font références aux règles de rappel.							
	(**) Les messages affichés en partie 4 deviennent font références aux messages audio et texto et non plus au règles de rappels.							

2. Definition of phone numbers

By default, when a policy is created, it is with a single phone number (TEL 1). If you do not add a phone number so you cannot use the option: 'Focusing the order of the numbers.' This is logical since the dialler has only a number.

By cons, with this configuration, you can only ask the dialler to call this number at specific times of the week to set strategies for each different spring schedule.

For the remainder of this user's guide we will assume that two issues were identified: number 'House' and 'Mobile' number on which SMS are accepted.

"Home" does not accept text messages.

"Mobile" that accepts receiving SMS.

The maximum value of the number of calls over a period limits the number of calls to the same number, for a given period.

The order of call numbers is the one shown on the screen from left to right. Currently: "Home" and "Mobile". To change this order simply select the number you want to move and click on the arrows that appear at the ends of the tab.

The parameter "column of the call file" to specify which column of the call will file or has been imported the corresponding number.

SMS agreed to specify whether or not it will be possible to send text messages to this number.

3. Policy Option 1: Focus on schedule

3.1 Operation

 **Options de la stratégie**

Privilégier l'ordre des numéros par rapport aux plannings. *Vous avez décidé de respecter les jours et heures d'appels définis dans les plannings. L'ordre d'appel des numéros ne sera pas forcément respecté.*

Privilégier les plannings par rapport à l'ordre des numéros.

In this configuration the system will focus on the days and times specified in the various schedules.

Benefits

You are certain to call your contact when you have decided, and this for each type of number and every day.

Disadvantages

If all the schedules defined in the policy does not cover all the hours and days worked by agents, it is possible that those finds no appeal.

3.2 Preliminary Calls

Nombre d'appel(s) préliminaire(s) : Utiliser les règles de rappel durant les appels préliminaires

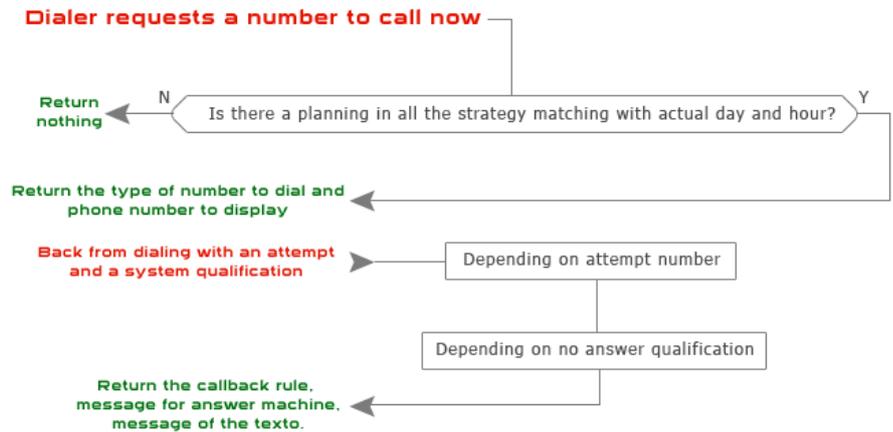
Pour valider, appuyer sur "Entrée"

Preliminary calls are calls made before moving to (x) number (s) following (s). For example, if you want to call the numbers one after the other, they grab one preliminary appeal.

For (s) call (s), it is possible to choose whether to use specific rules of reminders. If the user uncheck this option, then the non-response preliminary calls are treated as currently: Decreases the priority (in this case, we do not really know when will be reminded of the number).

By cons, it is still possible to play messages or texting, if this parameter is not checked.

3.3 Algorithm

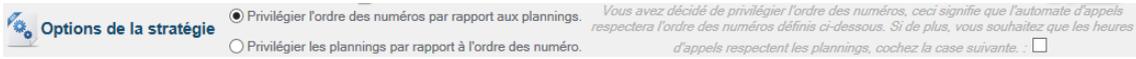


In this configuration, two special cases can occur:

- The opening hours of the campaign are as defined in schedules strategies are outside.
No number can be called.
- You can set a reminder an hour out of hours specified in the schedules.

4. Policy Option 2: Focus on the order of numbers entered

4.1 Operation



In this configuration the system will prioritize the order of numbers. This means that the second number will be called when all preliminary first calls have been made.

If "Respect hours of calls" is checked then the algorithm option is the same as for Option 1, unlike ready, research planning will be effected only on the type of issue being .

Benefits

You are certain to use the numbers in the order you decided. For example, you refuse to call a mobile if you do not have at least tried to call 2 times the home. If more you tick the 'Respect schedules', these numbers will be called in the days and hours chosen.

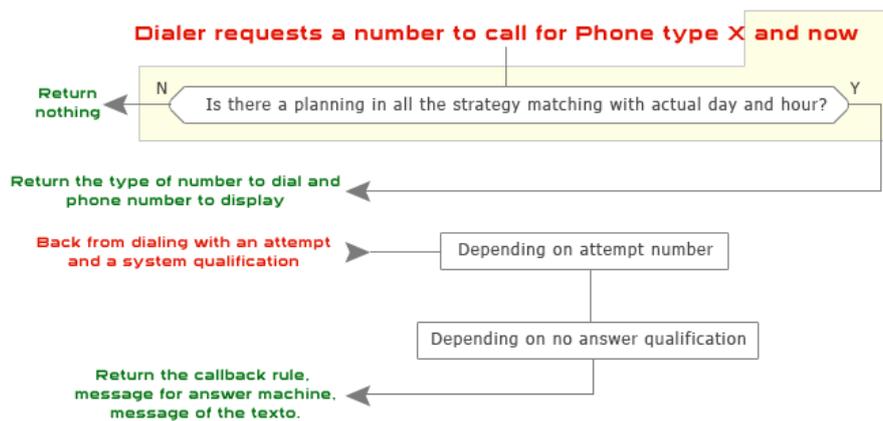
Disadvantages

There are still more likely to find no number to call with this version.

4.2 Preliminary Calls

Same as Option 1

4.3 Algorithm



Yellow area : depend on check box (B1,B2)

5. Range (s) Time (s) preferred (s) - Schedules



Use the same rules regardless of the schedule:

This option is visible only when there are at least two schedules defined for a number.

In this case, if the box is checked then the dialer will use the rules of recall whatever the schedule on which numbered. The display schedules will be grouped.

Alternate calls per schedule:

This option is visible only when there are at least two schedules defined for a number.

In this case, the dialer will try (to the extent possible) to call once on each schedule.

Definition of schedules:

For each number specified it is possible to set the days and hours of preferential calls. For each of the time windows it is possible to assign specific rules reminder for each of the different attempts. It is possible to add up to 4 schedules by number. By clicking on the schedule, the selected range is positioned to the right of the frame and rules reminder is displayed. The interface checks no track overlap.

Various editing keys are:

CTRL + click to select or deselect an entire row.

SHIFT + click to select or deselect an entire column.

6. Rules Reminders

6.1 The different parameters

3 NUMÉRO DE TÉLÉPHONE À AFFICHER POUR CE PLANNING

Numéro de téléphone à afficher :

Sets the number displayed on the recipient's phone.

The possibilities are:

- a-Show phone number hidden.
- b-A specific number.
- c-list number.
- d-random number in the list.

4 SÉLECTION DE LA TENTATIVE ET DU STATUT

Utiliser la même règle pour toutes les tentatives :

Afficher la règle de rappel pour l'appel N° :

Pour cette(ces) tentative(s), utiliser la même règle pour tous les status :

Sélectionner un status de non-réponse :

Similarly it is possible to use a rule reminder for all schedules, it is also possible to do X for each call attempts, and / or for all status of calls.

Otherwise, it will be possible to enter a different rule for each call attempt and for each call status.

The system statuses are available:
 Away / Busy / Wrong Number / Answer / Abandoned / Other.

Example: It is possible to leave a private message on an answering machine that would have attached to a particular schedule and particular attempt.

NUMÉRO	PLANNING	TENTATIVE N°	STATUT
MAISON	1	2	OCCUPÉ

This tag displays the call that we are to set the reminder.

5 RÉGLE DE RAPPEL

QUEL NUMÉRO?

QUEL JOUR?

QUELLE HEURE?

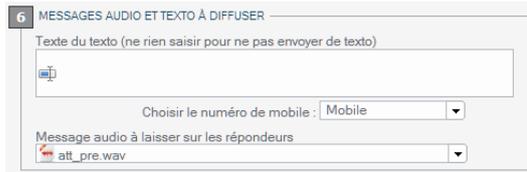
Une heure choisie aléatoirement dans le planning

hh:mm :

Rule reminder.

Here we define the programming reminder phone.

- a- We will choose which number to call. It should be noted that when 'the Prioritize order of numbers is activated, it is not possible to choose a number other than the current one. It is also possible to choose not to activate a reminder.
- b- We will choose which day recall. The choices are: today / a the next 7 days / or X days.
- c- Select what time.

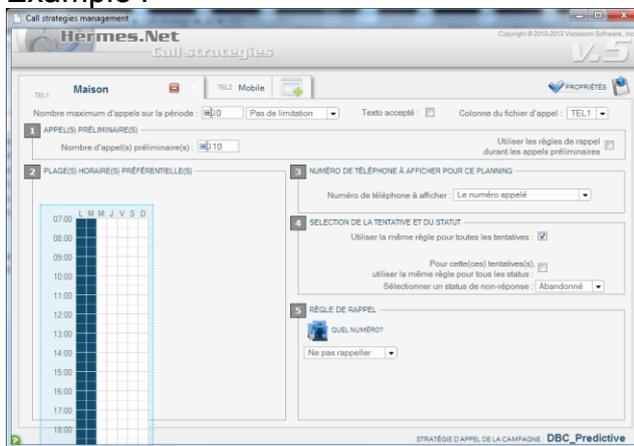


For each attempt and each status, it is possible to send a text message on one of the phone numbers entered. If the call led to an answering machine, it will be possible to leave a message on the answering machine.

6.2 Restrictions display

Depending on the available screen height it is possible that certain sections of the interface is not visible.

Example :



In this case, a warning message informs you :

