



# Survox Platform: Building Distributed Operations

2015 Survox Summit

# Building on the Survox Platform



## Why is this important to you?

- Learn options to become more scalable
- Expand business opportunities

## Agenda

- Distributed Operation Designs
- Benefits of Scalable Operations
- Implementing Distributed Operations
- Managing remote centers, workers and partners

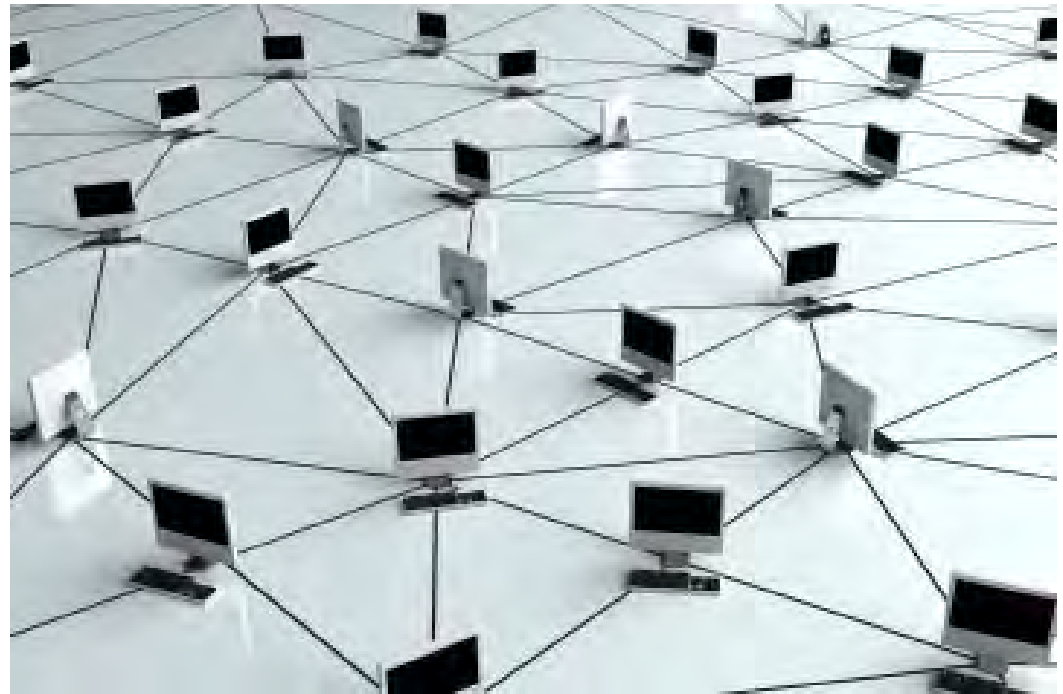
## Presenters

- Jim Ratto, Customer Success
- Allen Porter, Director of Customer Success

# At-Home / Remote, Distributed Centers & Partners

## Integrating Call Center Partners into your Operations

- Job Sharing
  - Split sample and quotas
  - Use the platform!
- Connectivity Methods
- Who's dialer
- Metrics
- Monitoring
- Global partner considerations
  - Data localization
  - Telephony
  - AWS & Twilio



The background of the slide features a complex network diagram. It consists of numerous nodes, represented by circles and squares of varying sizes, connected by a dense web of thin, light blue lines. The nodes are distributed across the top and bottom sections of the slide, with a solid black horizontal band in the center. The overall color palette is a range of blues, from light to dark.

# Interviewer Connections

# Definitions

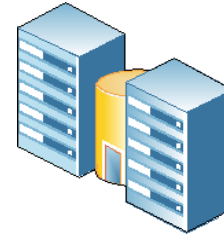
<b>DID</b>	Direct Inward Dialing
<b>Softphone</b>	A softphone is a software program for making telephone calls over the Internet using a general purpose computer, rather than using dedicated hardware. Often a softphone is designed to behave like a traditional telephone, sometimes appearing as an image of a phone, with a display panel and buttons with which the user can interact. A softphone is usually used with a headset connected to the sound card of the PC, or with a USB phone.
<b>VOIP, SIP</b>	Voice over IP is the delivery of voice communications and multimedia sessions over Internet Protocol (IP) networks, such as the Internet. SIP is Session Initiated Protocol.
<b>SSH</b>	Protocol which helps to secure network communications via the encryption of network traffic over multiple authentication methods
<b>**</b>	If your dialer is provisioned for 100 channels and you have 30 remote agents calling in then your outbound channels are diminished by 30 giving only 70 channels to use for dialing.



# Survox Call Center Automation Components



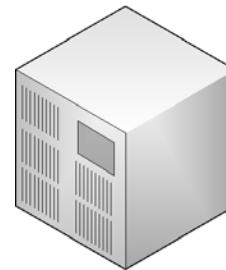
**Survent**



**Study Server**



**Dialer (CDI)**



**PBX (Asterisk)**

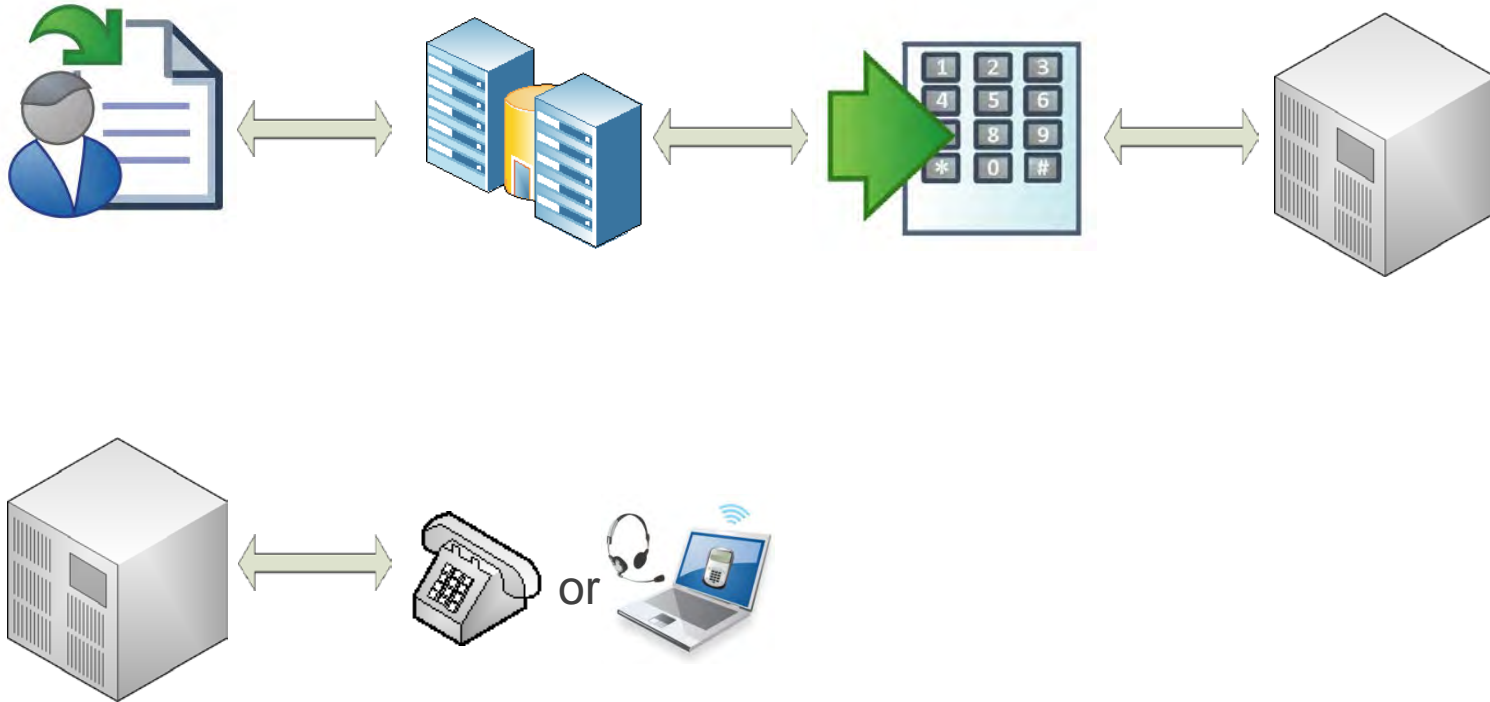


**Hard or Soft phone**

# Dialer Connection Options

REMOTE INTERVIEWER / CALL CENTER OPTIONS		
OPTIONS	INTERVIEWER CONNECTION - NO LOCAL DIALER	
	Dialer Connection to Interviewer	Interviewer Connection to Study
<b>DID</b>	<p>Interviewer calls a local DID number.</p> <p>Phone connection persists for the duration of the interviewer's shift.</p>	<p>Interviewer connects to the study via a direct internet connection, VPN connection or SSH session.</p>
<b>VOIP</b>	<p>Interviewer connects via VOIP to remote dialer. This connection can be accomplished by using a SIP based Softphone, SIP based hardphone or a SIP based PBX system.</p>	<p>Interviewer connects to the study via a direct internet connection, VPN connection or SSH session.</p>
<b>OutBound</b>	<p>Dialer calls the Interviewer's phone to set up the persistent connection.</p>	<p>Interviewer connects to the study via a direct internet connection, VPN connection or SSH session.</p>
LOCAL SUPPORTED DIALER @ REMOTE CALL CENTER		
<b>Local</b>	<p>Interviewers at Call Center connect to local dialer as they would dialing on their own local study server.</p>	<p>Interviewer connects to the study via a direct internet connection, VPN connection or SSH session.</p>

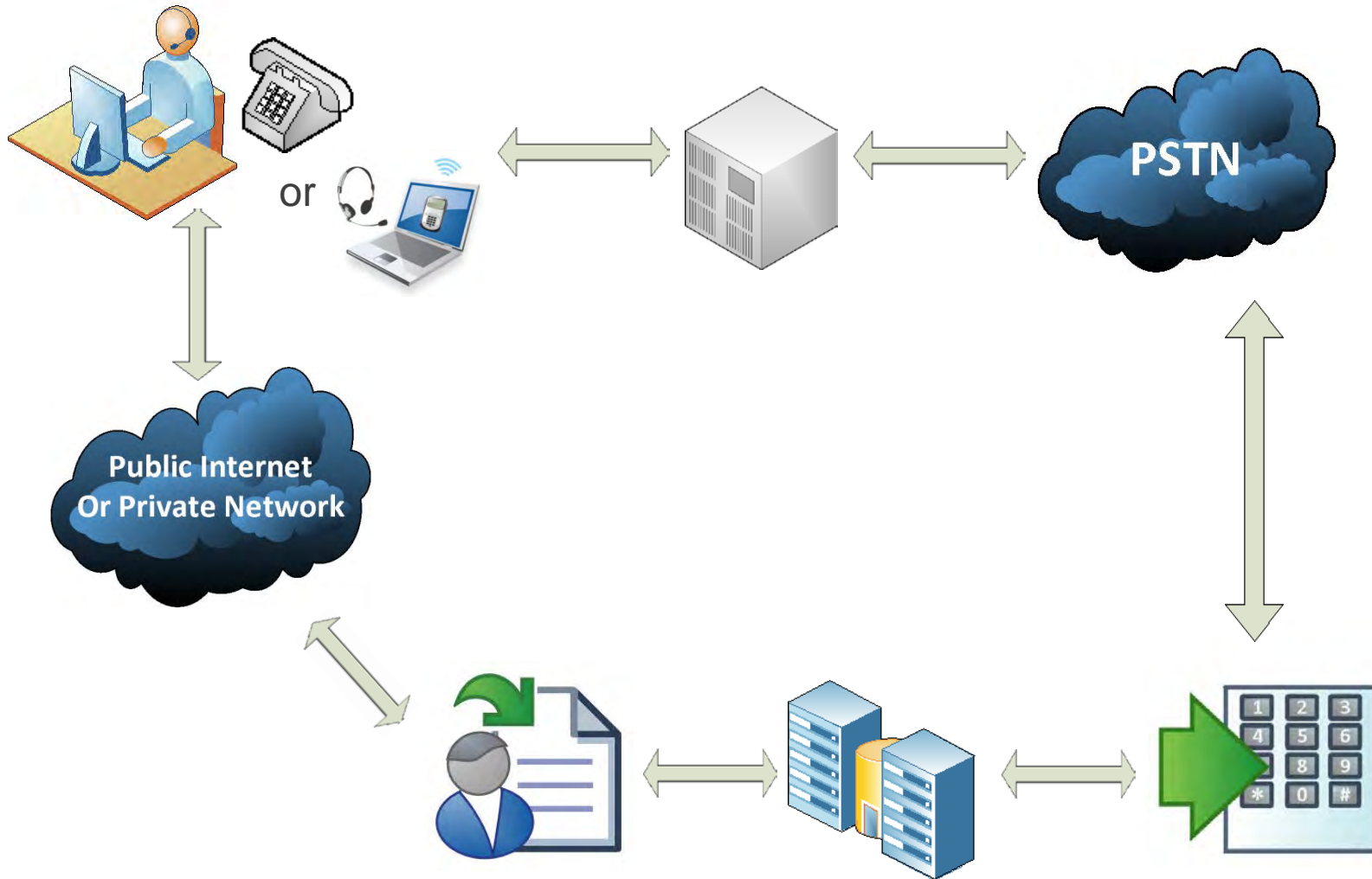
# Basic System Flow





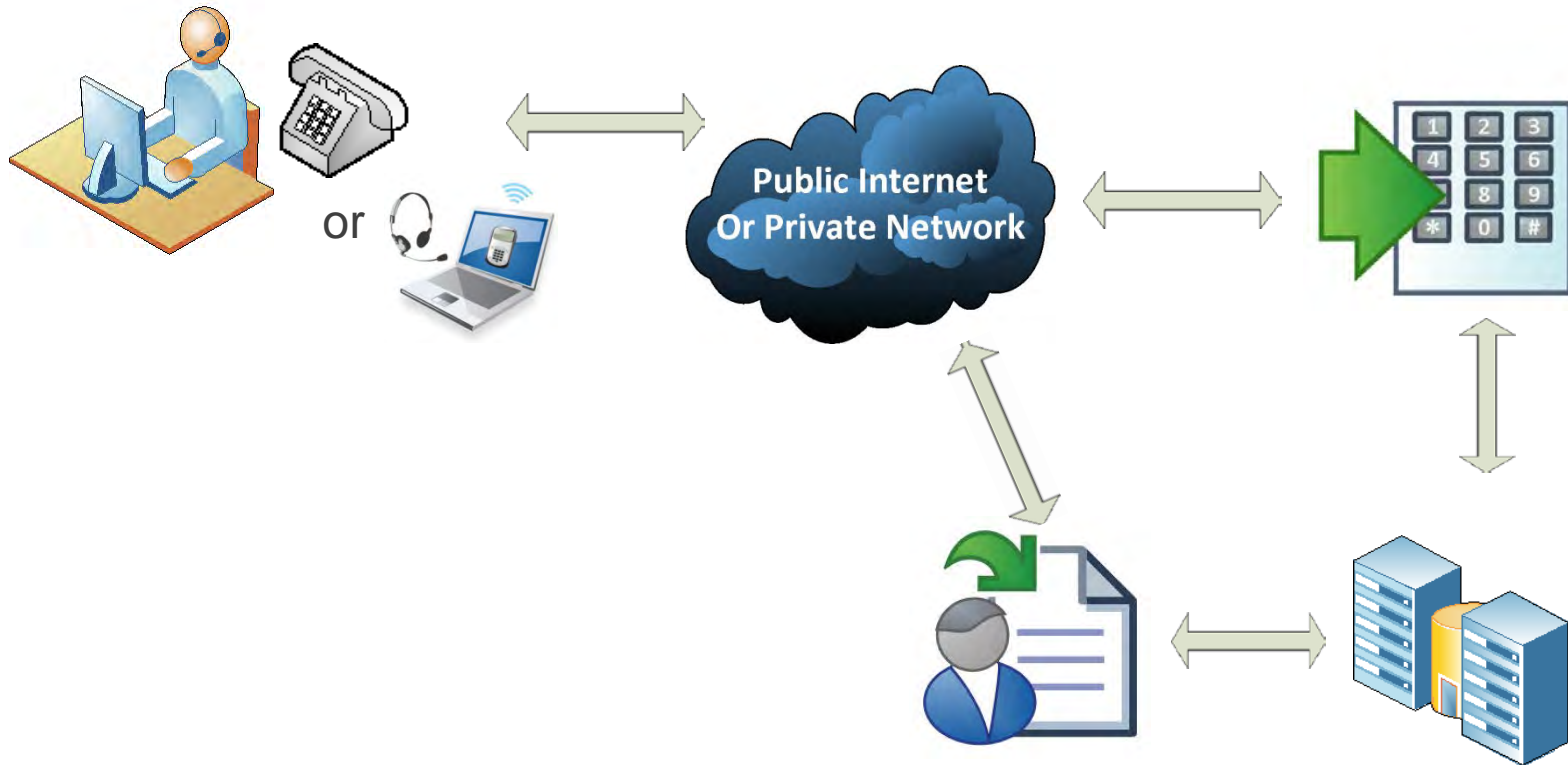
# Connecting Interviewer to a Dialer Using Inbound DID

(Reliable, Diminishes number of outbound channels, Per Min. Charges, Monthly DID charge [Charges vary based on carrier & contract])



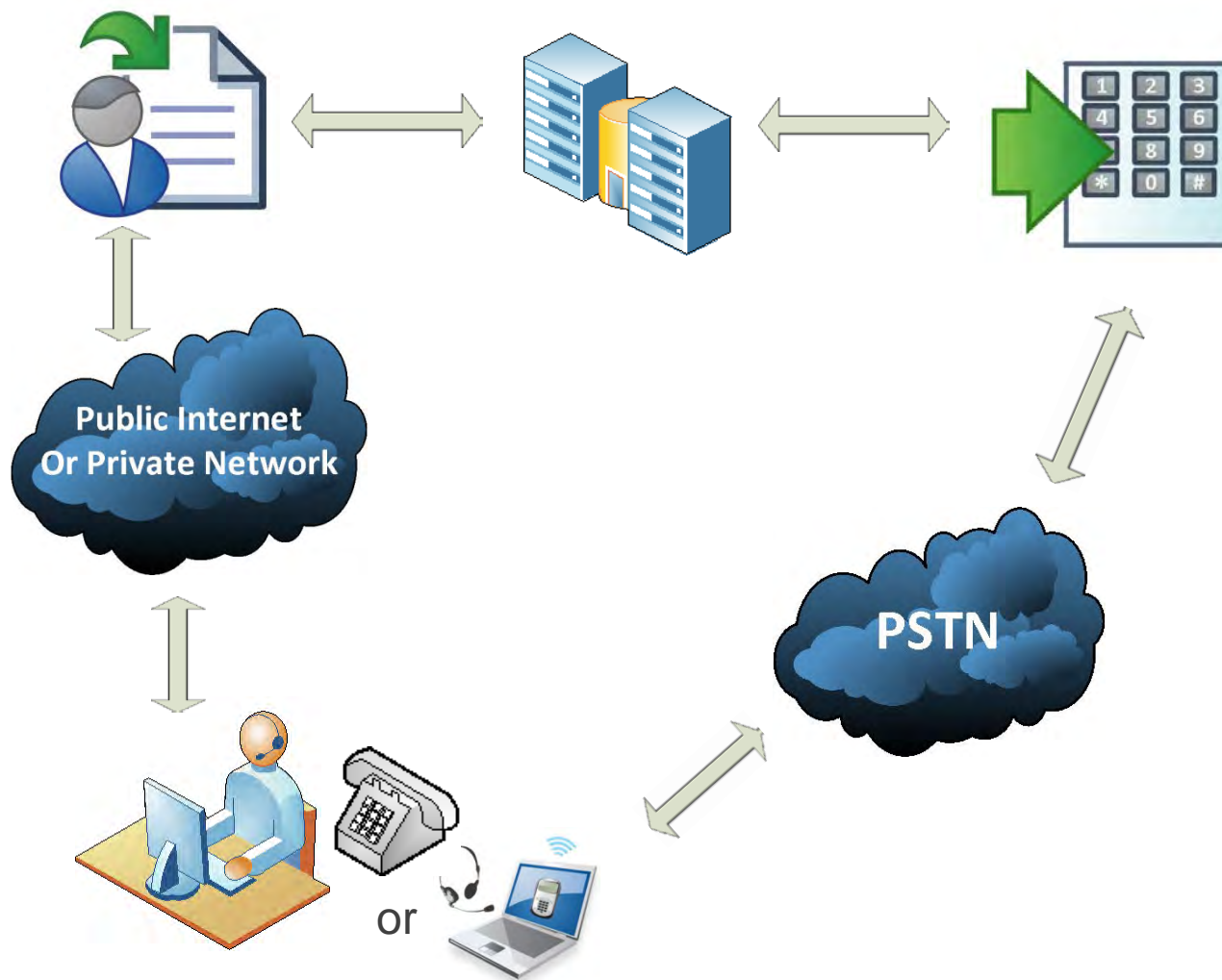
# Connecting Interviewer to a Dialer Using SIP or IAX

(No Additional Telecom Charges, Call quality relies on bandwidth when using public internet or private networks)



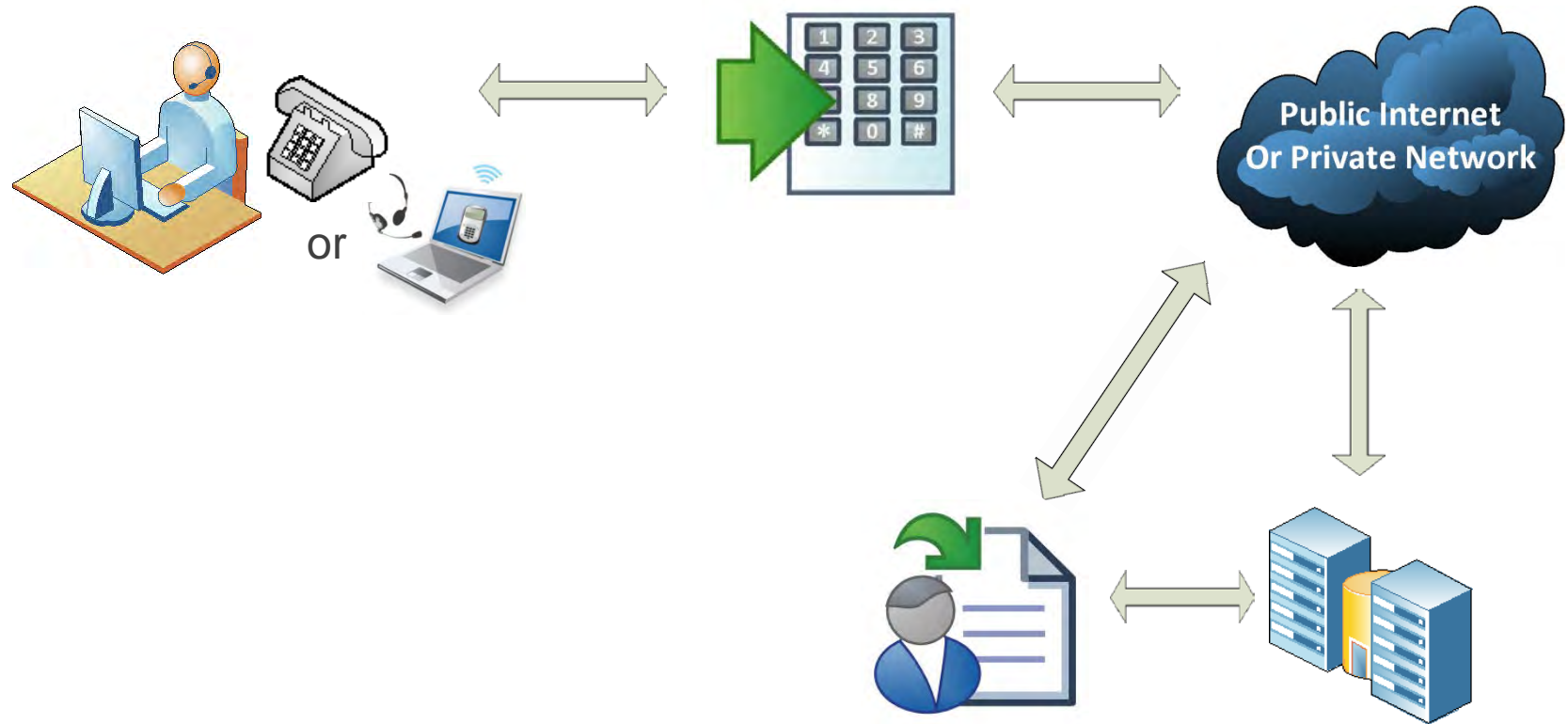
# Connecting Interviewer to a Dialer via Outbound Call

(Remote does not incur charges for call, Additional telecom costs for outbound call, Diminishes number of channels available for dialing)



# Connecting Interviewer with Local Dialer and Remote Study Server

(Local Personnel sign into dialer as normal, Telecom cost incurred by Local Call Center)





A background graphic consisting of a network of interconnected nodes and lines. The nodes are represented by circles and squares of varying sizes, connected by thin, light blue lines. The overall color scheme is a gradient of blue, from a darker shade at the top to a lighter shade at the bottom. The central text is white and stands out against a dark blue horizontal band.

# Reasons for Building Distributed Fielding Operations



# Flexible Staffing

- Flexible Staffing
  - Burst Capacity
  - Special skills
    - Language
    - Executive interviewers
  - International
  - Redundancy
  - Tighter scheduling
  - Lower fixed expenses
  - Cheaper Markets
- Considerations
  - Performance
  - Management
  - Resource availability
  - Monitoring
  - Training
  - Consistency

Flexible Staffing

# Brick & Mortar vs Remote Workers vs Partners



- Business Opportunities that might not otherwise be achievable
- Internal=\$12-15 per hour  
vs  
Partner=\$17-22 per hour
- Remote cost extra for phone depending on connection but saves on lease
- Fixed vs Variable costs

# Construction Estimates

Item	Terms	Comments	Cost Estimate	7 Year
<b>Annual Base Rental Rates:</b>	\$4 to \$5 per square foot	Delivered as-is condition	\$60,000.00	
<b>Annual Operating Expenses:</b>	\$5 to \$6 per square foot	Taxes, utilities, insurance, etc.	\$72,000.00	
<b>Lease Term:</b>	7 to 10 years	Possible termination rights		\$504,000.00
<b>Parking Ratio:</b>	7 to 10 spaces/1,000 square feet	Negotiate as much as possible		
<b>Construction Schedule:</b>	3 to 4 months	Includes design time		
<b>Landlord Construction Allowance:</b>	\$30 to \$40 per square foot	Amortized over the lease term		
<b>Tenant Construction Cost:</b>	\$10 to \$20 per square foot	Portion landlord will not fund	\$180,000.00	
<b>Furniture:</b>	\$1,000 per workstation	New workstation and chair	\$40,000.00	
<b>Cabling:</b>	\$250 per workstation	New cabling	\$20,000.00	
<b>IT &amp; Telephony Equipment:</b>	\$750 per workstation	New equipment	\$75,000.00	
<b>Back-Up Generator:</b>	\$100,000 to \$200,000	Subject to size of generator		
			\$447,000.00	Year 1

Source: [http://info.siteselectiongroup.com/blog/callcentercost\\_2014](http://info.siteselectiongroup.com/blog/callcentercost_2014)

The background of the slide features a network diagram with various nodes and connecting lines. The top and bottom sections are light blue, while the middle section is black. The nodes are represented by circles and squares of different sizes, connected by thin lines. The central text 'Implementation' is white and centered in the black band.

# Implementation



# Multi-Site Network and Operations

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## ■ Building multi-site call center networks

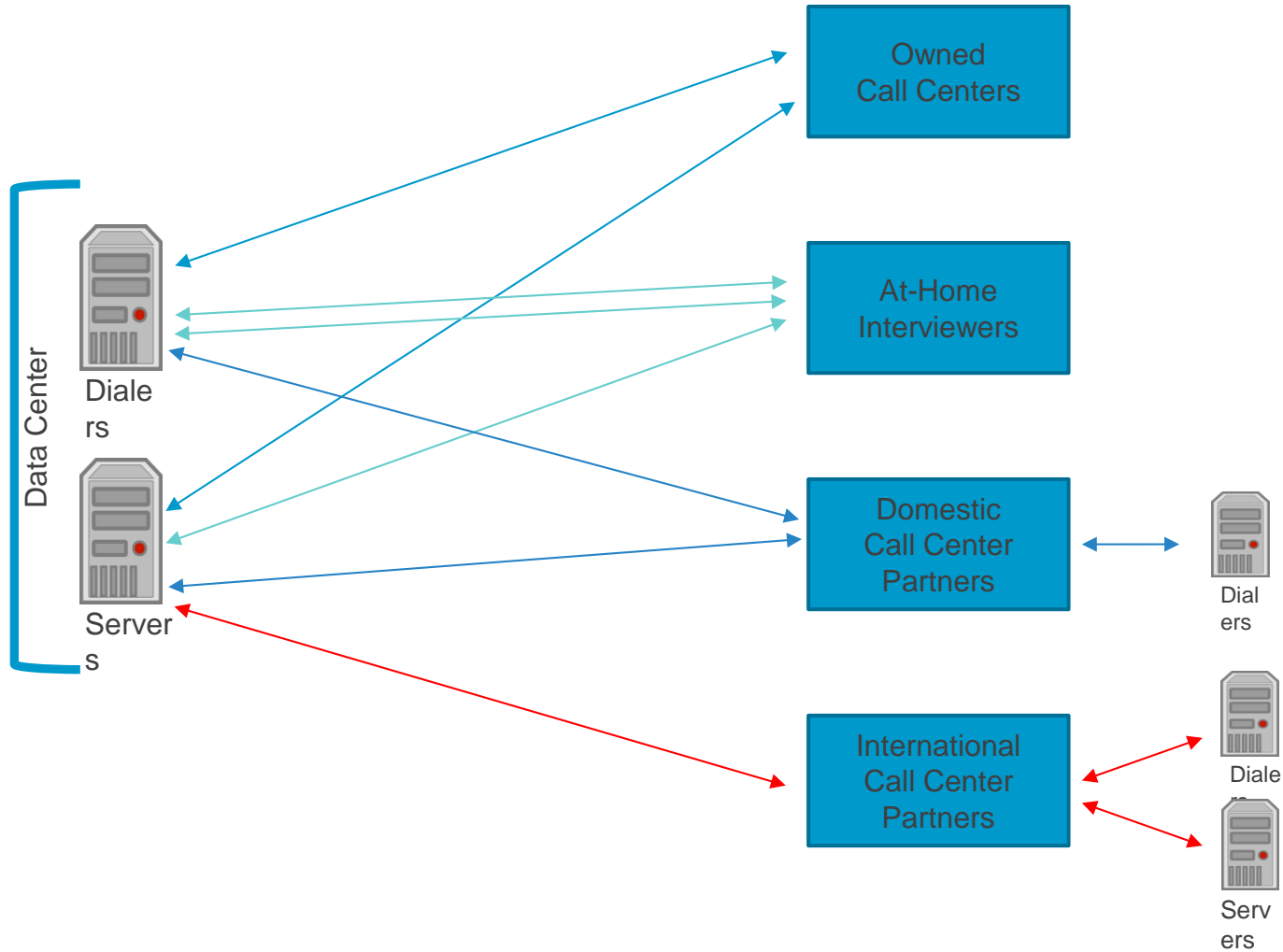
- Considerations domestic and off-shore
- Other countries might have regulations around calling into their country and where the data has to be collected and stored.
- Language

## ■ Software

- One license for single server/dialer
- Licenses for each server/dialer



# Overview



# Multi-Site Networking

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- Networking
  - Bandwidth
    - For data
    - For voice
  - Telephony
    - Number of channels
    - Dialing rates
    - Inbound vs outbound
    - QoS rules
  - Security
    - Firewall
    - VPN tunnels

# Multi-Site Networking

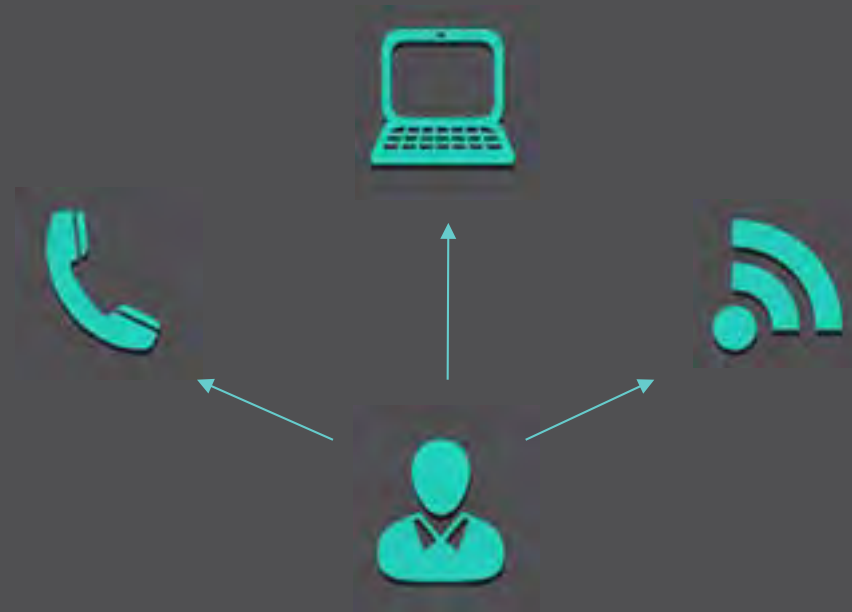
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- Impact of sound and recordings
  - Disc space usage (theirs vs yours)
  - Disc read/writes (theirs vs yours)
  - Sound File Transfers
  - Transcription/Play back

The background of the slide features a complex network diagram. It consists of numerous nodes, represented by circles and squares of varying sizes, connected by thin, light blue lines. The nodes are distributed across the top and bottom sections of the slide, with a central black band containing the title. The overall aesthetic is clean and professional, using a monochromatic blue color scheme.

# Interviewer Management

# Remote Workers - Requirements





# Remote Workers – Productivity

## Productivity Report

Print

Productivity Report																
Studies	Total Sessions	Calls Made	Completes	Other Resolved	Incidence	Callbacks Scheduled	Busy/no Answer/Other Active	Total Phone Hours	Hours on Completes	Hours on Suspends	Hours on Other Resolved	Hours on Other Active	Calls per Hour	Completes per Hour	Total cost (based on Intv Rate)	Cost per Complete (based on Intv Rate)
Total	9	7	4	2	3.00	1	1	0.15	0.05	0.01	0.01	0.01	572.25	160.90	0.89	0.39
aa																
Total for aa	5	7	3	2	2	1	1	0.1	0.05	0.01	0.01	0.01	572.25	114.75	0.58	0.24
cfmc_demo_minimal	5	7	3	2	2	1	1	0.1	0.05	0.01	0.01	0.01	572.25	114.75	0.58	0.24
%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

## Session by Counts

Print

Session by Counts																		
Studies	Total Sessions	Interview Starts	Completed Interviews	Breaks	Lunches	Meetings	Updated Cases	Interviews Monitored	Suspends	Resumes Completed	Calls Made	Specific Calls Made	Resolved Calls Made	Timed Callback Calls Made	Other Active Status Calls Made	Special Interviewer Calls Made		
Total	9	13	4	0	0	0	0	0	0	0	7	0	2	1	1	9		
aa																		
Total for aa	5	7	3	0	0	0	0	0	0	0	7	0	2	1	1	9		
cfmc_demo_minimal	5	7	3	0	0	0	0	0	0	0	7	0	2	1	1	9		
%	100.0%	100.0%	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%	0.0%	100.0%	100.0%	100.0%	100.0%		

# Remote Workers - Monitoring

- Visual monitor
- Recording review

12/1/2014, 11:48:37 AM

Select Interviewer	lvr	Study	Extn	Number	Caseid	LastTime	Pause
	aa	cfmc_den	0	-	not_yet_set	11:48:11 AM	

GETPHONE=[]

The number to dial is: (419) 429 - 5577

Call Histories  
#001: TUE OCT 07 2014 10:55-00:00 ID:SV01 STATUS:(870)Note:

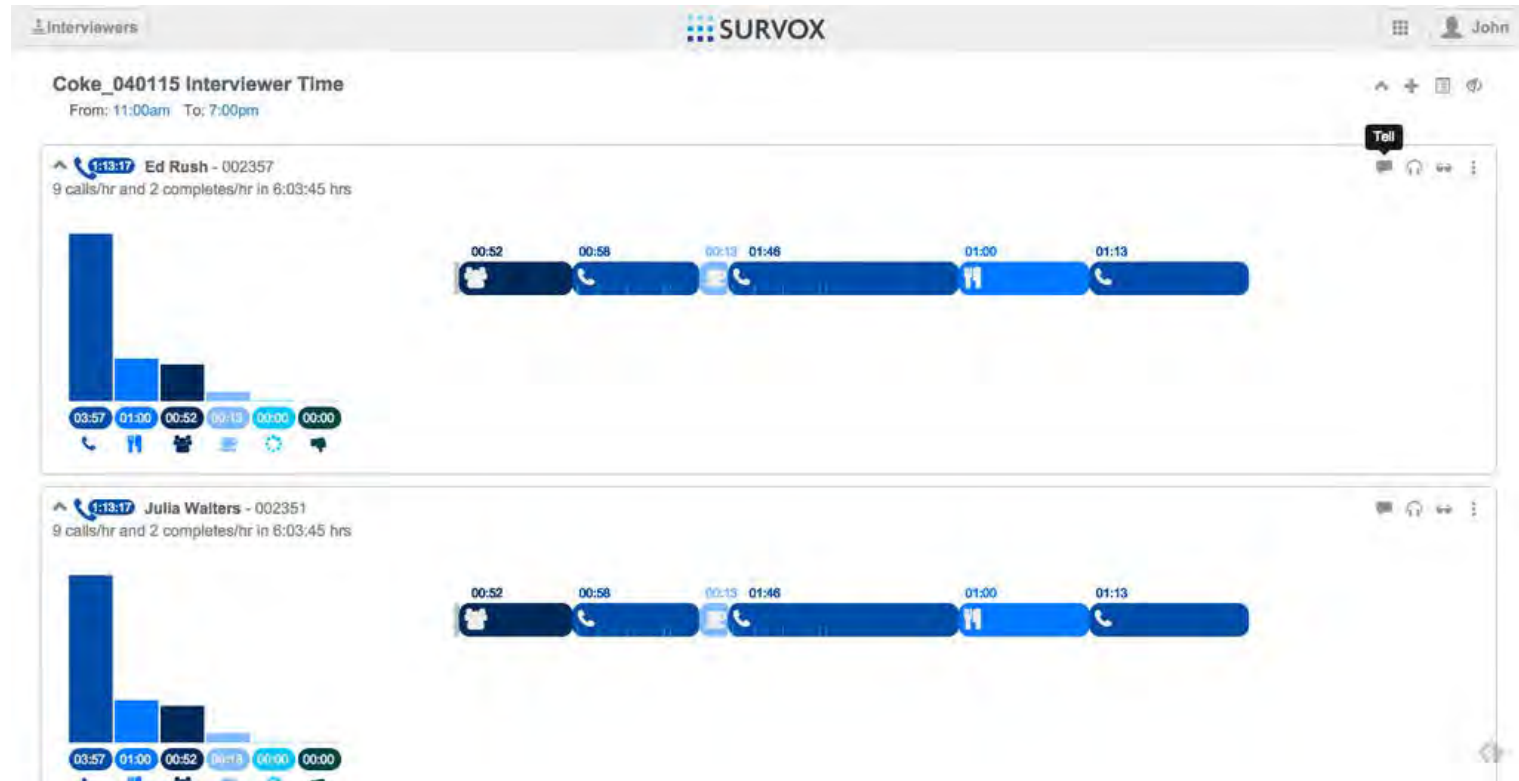
Callbacks		Non-Callbacks	
01	No Answer	11	Refused
02	Busy	12	Disconnected
03	Callback	13	Non-Business
04	Number Change	14	Language Problem
05	VM - Left Message	15	Fax/Modem
06	VM - No Message	16	Operator Intercept
		17	Wrong Number
		18	Not at Location
		19	Out of Business
		20	Compensation
		21	Waiting List
		22	Remove from List

Click "Next" to Continue, or Assign Call Status:

Next

SURVOX Console by CFMC

# Coming Soon!



# Coming Soon!

The screenshot displays the SURVOX interface for a user named 'Inturn/lowers'. The main section is titled 'Coke\_040115 interviewer Time' with a time range from 11:00am to 7:00pm. Below this, there are two performance cards. The first card is for 'Ed Rush - 002357', showing '9 calls/hr and 2 completes/hr in 6:03:45 hrs'. It features a bar chart with bars for 03:57, 01:00, 00:52, 00:03, 00:00, and 00:00. The second card is for 'Julia Walters - 002351', also showing '9 calls/hr and 2 completes/hr in 6:03:45 hrs' with a similar bar chart. A central pop-up window titled 'Tell Ed Rush' is overlaid on the interface. It contains a list of messages: '214 days ago: Talk Slower from:John Yetter', '214 days ago: Better from:John Yetter', '213 days ago: You've been idle for 10 minutes. Did you forget to sign out? from:Chuck Wilbur', '212 days ago: Remember to slow down. It's not a race. from:Chuck Wilbur', '212 days ago: You're doing much better with your pace. Good job! from:Chuck Wilbur', and '212 days ago: Some message from:Charlie McKinney'. At the bottom of the pop-up are 'Send' and 'Done' buttons.

# Discussion & Questions





# Next Steps

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- Please share this information with your call center operations team
  
- Think about
  - How you can create flexible, scalable operations to take on more work and manage costs
  - How can you expand your business opportunities?
  
- Learn more at [docs.Survoxinc.com](https://docs.Survoxinc.com)
  
- Visit [Survox Services Center](#)
  - Contact Professional Services for consulting



[WWW.SURVOXINC.COM](http://WWW.SURVOXINC.COM)