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Comverse ONE 3.7.7

Level 2 Process: 1.1.1.18 - Customer Interaction Management

Version 2

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Self-Assessment Process Mapping Report

making your network smarter

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About Comverse

Comverse is the world's leading provider of software and systems enabling value-added services for voice, messaging, mobile Internet and mobile advertising; converged billing and active customer management; and IP communications. Comverse's extensive customer base spans more than 125 countries and covers over 450 communication service providers serving more than two billion subscribers. The company's innovative product portfolio enables communication service providers to unleash the value of the network for their customers by making their networks smarter.

For more information on our products and services, visit our website at: www.comverse.com or contact us at: information@comverse.com

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1 L2: 1.1.1.18 - Customer Interaction Management

manage interactions between the customer and the enterprise. Interactions can be triggered by the customer or by the enterprise

The purpose of this process is to manage interactions between the customer and the enterprise. Interactions can be triggered by the customer (as a result of customer query or complaint) or by the enterprise(for example sending bills or other customer notifications.) All customer interactions are logged by the enterprise in order to provide a full track record of customer activity to the enterprise representatives. Customer interactions may be short lived (such as in the case of a query that is answered immediately) or may take long time to complete (such as in the case of complex orders or requests concerning back office intervention). When interactions are long the process is in charge of making sure the customer is notified in a timely manner about the progress of her request. Customer interaction history may be used by BI systems in order to gather information about customer profile and satisfaction. Customer interactions can span over multiple channels (such as: phone calls, web self service and devices.) each party involved in the interaction has a role that mandates its credentials. For some interactions users may need to login/authenticate themselves in order to get the appropriate role.

1.1 L3: 1.1.1.18.9 - Customer Interface Management

Managing all interfaces between the enterprise and potential and existing customers.

Customer Interface Management processes are responsible for managing all interfaces between the enterprise and potential and existing customers. They deal with contact management, understanding the reason for contact, directing customer contacts to the appropriate process, contact closure, exception management, contact results analysis and reporting. CRM contact may be related to one or several of Service Fulfillment, Service Assurance (service quality management and trouble or problem management) and Billing related customer enquiries or contacts.

1.1.1 L4: 1.1.1.18.9.1 - Manage Contact – Mapping Details

Process Identifier: 1.1.1.18.9.1

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie “instantiated”) with other similar process elements for application within a specific organization or domain.

Note: This L4 process has been decomposed into L5 processes in the v14 TMF model. As instructed, the mapping is being performed at the L4 level; however, information from the L5 processes is also included in the mapping table for additional context.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.18.9.1 - Manage Contact
Brief Description Manage all contacts between potential or existing customers and the enterprise L5 Identify Contact: deals with the identification of the contact

L5 Develop Contact: deals with development, enhancement and update of the contact

Extended Description

The purpose of this process is to manage all contacts between potential or existing customers and the enterprise. It deals with the identification of the contact, its development, enhancement and update [AM]

ComverseONE supports customer interactions through various channels: Customer Center , CSR Portal, Web Self-Service, Network Self service [IVR and USSD], custom GUIs using Comverse ONE APIs, Sales UI, etc.

For existing customers (that is, where a billing account already exists), a primary contact is captured as part of initial customer acquisition; for prospects and leads a primary contact is captured as part of the lead handling and qualification process. See the following for more details:

- ***Error! Reference source not found.***
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Part of that process involves verifying during customer interactions that the customer is who they claim they are. Comverse ONE issues a unique identifier for each customer so the customer can be positively identified. If the customer does not have their unique identifier, other search criteria can be used and unique customer attributes used to ascertain the true identity of the customer and whether they are authorized to represent account and subscriber entities stored in Comverse ONE. Searches on historical, disconnected customer entities are also supported.

*See **Error! Reference source not found.** (and children) for more details.*

For billing accounts, contact information is maintained in the same Customer Inventory database as all other customer information. Primary contact name, phone number, email address, title, mailing address, and so forth are all stored with the billing account, and additional contacts can be associated with the account as needed.

For prospects and leads, primary contact information is captured as part of the lead handling and qualification process, maintained in the same database as other lead information, and ultimately transferred into the Customer Inventory database when the lead is fully qualified and converted into a new customer acquisition (NCA) order.

Key contact information is checked at the database level to ensure that it has been provided. This includes billing address, preferred payment method, contact information (e.g. phone/email) etc.

Typically this is not validated at data entry time in order to streamline the NCA process, although providers can include validation steps if desired.

*As above, see **Error! Reference source not found.** for an overview and **Error! Reference source not found.** (and children) for more details.*

*Freeform notes can also be added to a contact to capture interaction details. See **Error! Reference source not found.** (and children) for more details.*

Explanatory

L5 Identify Contact: This could be an individual as a consumer, or part of a business organization (small, medium or corporate) as defined by customer segmentation prevalent in the organization

L5 Develop Contact: For a new customer contact, this will include capturing mandatory details which could be subject to validation.

Mandatory

L5 Identify Contact: Verify the individual / entity (organization) responsible for making contact

L5 Develop Contact: Expand the detail attributes of the contact.

Optional

Not used for this process element

Interactions

Not used for this process element

1.1.2 L4: 1.1.1.18.9.2 - Manage Request (Including Self Service) – Mapping Details

Process Identifier: 1.1.1.18.9.2

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie “instantiated”) with other similar process elements for application within a specific organization or domain.

Note: This L4 process has been decomposed into L5 processes in the v14 TMF model. As instructed, the mapping is being performed at the L4 level; however, information from the L5 processes is also included in the mapping table for additional context.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.18.9.2 - Manage Request
Brief Description Manage all requests (inbound and outbound) made by potential and existing customers L5 Handle Request: receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request L5 Provide Request Status: manages the status of the request and is able to provide status information at any moment in which the request is active L5 Close Request: formally closes the request when all related activities have been terminated **Extended Description** The purpose of this process is to manage all requests (inbound and outbound) made by potential and existing customers. It receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request; it manages the status of the request and is able to provide status information at any moment in which the request is active; it formally closes the request when all related activities have been terminated. [AM] *See **Error! Reference source not found.** and children for details on how a request is created/received, and **Error! Reference source not found.** and **Error! Reference source not found.** for a high-level flow.* *Customer-initiated requests mediated through a CSR are managed through a Workflow, configured as described in **Error! Reference source not found.** and **Error! Reference source not found.**. Broadly speaking, the request is associated with one or more Tasks and the CSR performs the Task and updates the Task status and details. See the following for additional details:* • ***Error! Reference source not found.*** • ***Error! Reference source not found.*** • ***Error! Reference source not found.** and children* • ***Error! Reference source not found.** and children* • ***Error! Reference source not found.** and children* *The status of outstanding requests can be reviewed as illustrated in:* • ***Error! Reference source not found.** and children,* • ***Error! Reference source not found.** and children* • ***Error! Reference source not found.***

Requests can be cancelled prior to their completion as illustrated in ***Error! Reference source not found.*** *and children.*

Customer requests fulfilled immediately by the customer themselves (i.e.; self-service) are typically handled less generically; rather, certain common classes of request have their own flow and business processes associated with them. For example, providers can authorize customers to make their own Order/Bundle selections, as illustrated in ***Error! Reference source not found.****, or to create their own billing accounts, as illustrated in* ***Error! Reference source not found.****.*

A third category of request worth mentioning is internal requests. For example, if a CSR attempts to issue a monetary adjustment that exceeds that CSR's configured maximum adjustment amount, the adjustment must be approved by a supervisor with a higher threshold, as illustrated in ***Error! Reference source not found.****. This involves a request being made implicitly by one CSR to another. However, this is probably outside the intended scope of 1.1.1.18.9.2.*

Explanatory

L5 Handle Request: Handle a request to make changes This could be a request to change to enable customer/ subscriber, to start or stop making use of specific products and services

Mandatory

L5 Handle Request: receives the request and either enables its originator to automatically fulfill it, or identifies and activates the opportune process to accomplish the request. Determine type of stakeholder request

L5 Provide Request Status: manages the status of the request and is able to provide status information at any moment in which the request is active. Track business events using the request status; each of which is governed by rules, followed by a set of actions to reach the next status

L5 Close Request: formally closes the request when all related activities have been terminated

Optional

Not used for this process element

Interactions

L5 Handle Request: where relecant, identifies and activates the opportune process to accomplish the request

1.1.3 L4: 1.1.1.18.9.3 - Analyze & Report on Customer

Process Identifier: 1.1.1.18.9.3

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie "instantiated") with other similar process elements for application within a specific organization or domain.

Note: This L4 process has been decomposed into L5 processes in the v14 TMF model. As instructed, the mapping is being performed at the L4 level; however, information from the L5 processes is also included in the mapping table for additional context.

LEVEL 4 PROCESS MAPPING DETAILS

1.1.1.18.9.3 - Analyze & Report on Customer

Brief Description

Perform all necessary analysis on closed requests and on customer contacts and generate related reports

L5 Analyze Customer Requests & Contacts: perform all necessary analysis on closed (completed or unfulfilled) requests and on customer contacts

L5 Report Customer Requests & Contacts: generates related reports, to be utilized for process improvement activities, proactive problems prevention, up-sell opportunities definition, etc.

Extended Description

The purpose of this process is to perform all necessary analysis on closed (completed or unfulfilled) requests and on customer contacts and it generates related reports, to be utilized for process improvement activities, proactive problems prevention, up-sell opportunities definition, etc. [AM]

The Service (Case) UI allows reports to be defined and executed that automatically summarize key data about requests in various categories, including closed (completed or unfulfilled) requests, as shown in **Error! Reference source not found.**.

CSRs can review individual cases in more detail, as shown in **Error! Reference source not found.** and children.

Explanatory

Not used for this process element

Mandatory

L5 Analyze Customer Requests & Contacts: perform all necessary analysis on closed (completed or unfulfilled) requests and on customer contacts

L5 Report Customer Requests & Contacts: generates related reports, to be utilized for process improvement activities, proactive problems prevention, up-sell opportunities definition, etc.

Optional

Not used for this process element

Interactions

Not used for this process element

1.1.4 L4: 1.1.1.18.9.4 - Mediate & Orchestrate Customer Interactions

Process Identifier: 1.1.1.18.9.4

Process Context

This process element represents part of the overall enterprise, modeled in business process terms, and can be applied (ie “instantiated”) with other similar process elements for application within a specific organization or domain.

Note: This L4 process has been decomposed into L5 processes in the v14 TMF model. As instructed, the mapping is being performed at the L4 level; however, information from the L5 processes is also included in the mapping table for additional context.

LEVEL 4 PROCESS MAPPING DETAILS 1.1.1.18.9.4 Mediate & Orchestrate Customer Interactions
Brief Description Ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers L5 Identify Customer Interactions Data Formats: Performs identification of the necessary data formats to be sent externally. Increasingly transactions with external parties (e.g. customers using RosettaNet or Web Services standards) will need to conform to message and data formats defined by third parties or third party organizations. The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s. L5 Orchestrate Customer Interactions - Where required, orchestrates interactions with external parties so that messages and transactions are undertaken with defined and agreed orchestration for message exchange. L5 Mediate Customer Interactions - Manages conversion of externally received messages into the required internal enterprise formats, based on the specific transaction type and involved external party.
Extended Description The purpose of the Mediate & Orchestrate Customer Interactions is to ensure that transaction message structure and interactions conform to agreed, externally defined standards used by the enterprise and its customers. Increasingly transactions with external parties (e.g. customers using RosettaNet or Web Services standards) will need to conform to

message and data formats defined by third parties or third party organizations. Based on the specific transaction type and involved external party, this conformance will require the identification of the necessary data formats to be sent externally, and conversion of externally received messages into the required internal enterprise formats. In addition, interactions with external parties may require that messages and transactions need to be undertaken with defined and agreed orchestration for message exchange. The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s.[A]

All Cases, Interactions, and Events related to customer interaction management are maintained in a Sales and Services database which can be accessed through the Comverse ONE API. All required data can be entered into or queried from the system this way, through a published API specification.

Handling input records can be done through Comverse ONE customization or through third-party transaction processors or ESBs using the Comverse ONE API; either way, the inbound message format and protocol is defined by what the tool is configured/coded to accept and how it maps inbound records to the API object attributes.

Additionally, Comverse ONE includes an Outbound Communications (OBC) module that can automatically send notifications involving a Case, Interaction, etc. to a network element or third-party notification management system. For example, after a discussion with a customer that results in an Interaction being recorded in Comverse ONE, OBC might automatically initiate a notification to the customer with a summary of the interaction details. The format of such messages is specified within the OBC configuration (in some cases this may require customization as well, depending on the required message content and structure), typically through an appropriate Web Service.

Of course, providers can also use custom tools to query the Comverse ONE API for Case, Interaction, etc. data and format the corresponding record for outbound processing, and apply whatever interaction standards to subsequent outbound communication of that information are desired, just as they can for inbound records.

Explanatory

L5 Identify Customer Interactions Data Formats: Increasingly transactions with external parties (e.g. customers using RosettaNet or Web Services standards) will need to conform to message and data formats defined by third parties or third party organizations.

Mandatory

L5 Mediate Customer Interactions - Manages conversion of externally received messages into the required internal enterprise formats, based on the specific transaction type and involved external party.

Optional

Not used for this process element

Interactions

L5 Identify Customer Interactions Data Formats: The actual agreement between the parties to use specific interaction standards is part of the Support Customer Interface Management and Support Selling L3s. L5 Orchestrate Customer Interactions - messages and transactions are undertaken with defined and agreed orchestration for message exchange. L5 Mediate Customer Interactions - Manages conversion between external and internal formats