



## Sample Customer Implementation Check List

- Service Agreement is signed
  - Desired “Live Date” agreed upon between Customer and TC Kokua
  - Content is provided by Customer to TC Kokua no later than first week of implementation:
    1. Information and general knowledge
    2. Ticketing information, including processing, credits, refunds
    3. Soft copies of brochures and any necessary mailing materials
      - a. All other content needed to address customer contact types as defined above
  - Content incorporated by TC Kokua into the WPJ database
1. ACD (Automatic Call Distributor) set up

The ACD determines which calls to route to which agent based on queue priority and agent availability.

WJP set up for ACD includes:

    - a. Creating individual agent access
    - b. Creating support queues; phone, email, voice mail, live chat and/or co-browse.
  2. IVR (Interactive Voice Response) set up

The IVR is a piece of equipment that collects routing information from callers. When a person calls, he or she is presented with IVR choices (a phone tree). The IVR may include, “Press 1 for sales; Press 2 for a representative,” etc. The calls are then routed to the appropriate queue.

WPJ set up for IVR includes: Individual IVR set up for each Channel and Queue.

    - a. Channel IVR includes:

Hours of Operation set up

Custom Greetings: Greeting Wave files created for Open Hours and Closed hours

IVR Keys created for each individual Queue
    - b. Queue IVR includes:

Hours of Operation set up

Custom Greetings: Greeting Wave files created for Open Hours, Closed Hours, VM Queue and Wait Music.

Default music wave files are available; these include Contemporary, Classical, New Age or Jazz.

Custom music wave files may be uploaded into the IVR with Customer's choice of music.

IVR choices or Phone trees may include up to nine queues as the Customer needs. Each queue will require set up with greetings and music wave files.

3. CRM (Customer Relationship Management) set up

CRM is the database that stores Customer information (the caller)

CRM

Includes Customer contact and Customer follow up case fields and labels. Includes but is not limited to: Customer contact information, (name, email, phone, address) Date, Company, as well as any additional custom field types determined by the Customer.

4. Customer Content

WPJ set up of Customer Content (FAQ)

Customer Content is the Information provided by the Customer to TC Kokua pertaining to the company, product or services of the Customer.

a. The Customer Content information is copied from softcopy into the WPJ FAQ for agent access.

- TC Kokua Customer Service Representatives trained on Customer content
- Commencement of service!