TeleRapid Handout #2

In this second interview, the analyst speaks with Roberto Jones about the requirements for the new presubscribed system.

Person	
Analyst	Hi, I want to gather some information on the presubscribed system requirements. How about we start by defining the start and end of the process.
Roberto Jones	The presubscribed process covers the process of working with prospective clients to establish long-distance telephone accounts with TeleRapid, obtaining third party verification for those accounts, and then requesting activation of the account from the local exchange carrier (LEC).
Analyst	What triggers the process?
Roberto	The process starts with either TeleRapid contacting the prospective client or a prospective client contacts their LEC requesting TeleRapid as their long-distance provider. The process ends with activation of the clients long-distance account.
Analyst	How do you know who to contact?
Roberto	We plan on Marketing to put together an Outbound Information List of all the prospective clients. I can provide you with a copy.
Analyst	OK, so we have the start of the process that can be either us contacting a prospective client on our list or a client contacting us via the LEC. The end of the process is activation of their long-distance service. Let's walk through the process steps in-between this start and finish.
Roberto	To start, the Sales Associate will call the people on the Outbound Information List and describe the service. If the client wants to subscribe, then the process continues onto the next step; otherwise, if the client doesn't want to subscribe, then we should record that information as well. Also, we should find out why they don't want to subscribe, this may help us later in Marketing or redesigning the service.
Analyst	And what about when the client contacts us?
Roberto	In that case, the client needs to be routed to a Sales Associate and the same process is done.
Analyst	OK, this is good, let's continue on to the next step.
Roberto	The clients who will accept the presubscribed service now continue to the next step where the Sales Associate needs to gather information from them to establish the service. We'll need to know the person's address, billing information, type of service they want, and other personal information.
Analyst	OK, so the client provides the information then what needs to be done?
Roberto	The Sales Associate then needs to validate the information. We have an outside provider that does a basic credit check. We also have a system called Perfect Address. It is software that checks and validates their address information. If the credit check and address check meets our minimum requirements such as correct name, address, and acceptable credit history, then the application is approved. Otherwise, we'll have to disapprove the application – we should record why. Also, we need to tell the client why it was rejected. This process may or may not be in real time.
Analyst	OK, so let's assume the application is approved by the credit agency, then what's next?
Roberto	The terms and conditions for the client's contract needs to be finalized. We'll have to prepare templates for the various types of contracts available. If the client accepts all terms, plans, and conditions for such a contract, then the next step will be for the client to identify the ANI they want to activate for the account. If the client does not agree with the contract, he/she can reject the terms and the process is ended. The rejection made by the client should be recorded.
Analyst	Can you explain to me this ANI?

Roberto	ANI stands for Automatic Number Identification; it is the term we use for the unique ID of the telephone client. Since a person can have multiple telephone numbers we need to know which one to activate for the new service.
Analyst	And once you have the ANI that is when you need to do the third party verification?
Roberto	Yes, we need to setup the system so that the customer is transferred to the Third Party Verification (TPV) provider and then transferred back seamlessly. From the TPV we get a voice log that we need to save. Essentially, it is a recording of the telephone conversation and the client agreeing to sign up for the long-distance service. If approved then we can go ahead with activation.
Analyst	Do you see activation as part of the same process?
Roberto	Yes, activation is the last main step. To activate an ANI means that whenever a long-distance telephone call is made from that telephone it goes through our system and we bill for it. To activate the ANI we need to know which LEC the ANI belongs to. Here in South Florida it is usually Bellcore, but since we serve the entire US we work with many LECs. To identify which LEC an ANI belongs to we need the TPM (Terminating Point Master) and LERG (Local Exchange Routing Guide) information. We should probably get this information monthly, we don't need to it any more frequently because it doesn't change that much. We would have to load it into the presubscribed system. When the ANI/LEC identification is complete, the system should automatically create files of interconnection for the LEC that later will generate the file format of each LEC.
Analysis	What type of reports should the system generate?
Roberto	I think we should have reports on the daily activity of who was signed up; reports on who rejected the service and why; reports of those we called but did not answer so that we can call them back; reports of those who were rejected and the reasons for the rejection. All the information is very valuable to marketing.
Analysis	OK, I think I understand the process. I'll create a flowchart and then we can review it to see if we agree on how the process should be designed. Now, let's shift gears and talk about the performance aspects of the process.
Roberto	I think the Marketing Director gave you some ideas of the volume that we would want to do. In year one we want to process 15,000 new subscribers and we want to grow that number to about 25,000 to 30,000 per year. We would expect about 60% of those customers to be current casual calling customers and the other 40% to be new customers. So the process, system, and organization needs to handle this call volume.
Analysis	About how long do you think each of the main steps take?
Roberto	Well, its early to talk about the time, but I think we can explain the program and collect the required information in anywhere from 7-10 minutes; the credit and address check might take 2-4 minutes; third party verification might take about 5 minutes; then activation will take another 5 minutes. It might take 25-30 minutes to sign up a single customer. Of course the variation might be much larger, for example clients that already decided they want TeleRapid will be quicker because we won't have to explain the services as much.
Analysis	What type of skills do you think the Sales Associates will need?
Roberto	They need to have basic computer skills to enter information, search for information and so forth. Since they will spend most of the day speaking to clients they need good speaking voices. All of them need to be bi-lingual because many of our clients prefer Spanish. Maybe at least one of them should also speak Portuguese because we have many Brazilian clients too.
Analysis	OK, I think I have sufficient information to start. I'll keep you informed about how the project progresses.