

Offering	Description	Level 1 2days - 1 week	Level 2 1 week - 3 weeks	Level 3 3 weeks - 8 weeks	Level 4 4-8 months
Gather business objectives	Upfront, gather business needs for automation, causes for call center pain, major initiatives	X	X	X	X
Business owner interviews (in-person)	Conduct 1:1 in-person interviews with key stakeholders throughout the business (Billing dept lead, tech support lead, VP Consumer experience, VP Marketing...)			X	X
Business owner interviews (remote)	Conduct 1:1 phone interviews with key stakeholders throughout the business (Billing dept lead, tech support lead, VP Consumer experience, VP Marketing...)		X		
Onsite call center visit	Sit with representatives of every skill to listen to phone calls in real time, conduct a roundtable brainstorming sessions with representatives, conduct a roundtable with managers and trainers, conduct final debrief with call center owners			X	X
Remote call center review	Listen to recordings of calls to representatives (recordings supplied by customer)	Optional	X		
Remote brainstorming session	conduct brainstorming sessions with representatives and managers by phone		Optional		
Technical Needs analysis (SE)	Sales Engineer spends up to a day onsite to understand the current call center technology and assess needs for future data integration, CTI, telephony			X	X
Call flow review	Review and critique documented call flows of current automation provided by customer	X	X	X	X
Test call analysis	Record test calls to the current automation and critique	X	X	X	X
Caller Bill of Rights Scorecard	Rating of IVR design versus Caller Bill of Rights best practices	X	X	X	X
Detailed Call Center Data Analysis (Sr. Consultant)	Review and chart data from call center reports provided by customer. Identify major call types and call center trends. Support qualitative findings from design review			X	X
Text based sample calls	Document a series of sample calls to show Angel's vision for future automation.		X	X	X

Recorded sample calls	Record sample calls with a professional talent to convey the overall vision for future automation			X	X
Roadmap	Create a detailed roadmap showing recommended improvements and additional automation broken out by phase according to level of effort and ROI			X	X
Detailed Business Case	Create a detailed business case showing estimated annual savings from opportunities in the roadmap			X	X
Brand Assessment	Review brand materials from TV, radio, print ads, interview marketing leads, detail key brand tenets and a plan for extending the brand through the IVR channel			Optional	X
Prototype and Usability Testing	Build a working prototype application based on Angel's recommendations, conduct a usability study to test the prototype with real callers				X
Competitor Analysis / Benchmarking	Place calls into competitor IVRs for a qualitative analysis, identify strengths and weaknesses, perform a quantitative benchmark analysis based on available data				X
SOW's	Create SOWs for the work in the proposed roadmap, broken out by phase	X	X	X	X
Implementation Schedule	Create a rough implementation schedule for the work in the proposed roadmap, broken out by phase	X	X	X	X