



## **Sales Toolkit for Avaya Proactive Outreach Manager**

**For Avaya Teams and Business Partners**

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## Introduction

Welcome to the Syntelate Sales Toolkit.

This document provides you with the information you need to position Syntelate as a solution that:

- Adds value to the contact center
- Meets the scripting requirements of your customers
- Delivers a wider range of business benefits

Syntelate is a product of Inisoft Ltd, a UK software company that has a global agreement with Avaya for the supply of Syntelate and also for the provision of professional and support services to all Avaya sales regions.

Syntelate is Avaya's chosen and fully integrated agent desktop for Proactive Outreach Manager 3.0 and above.

The document is available to all sales and pre-sales employees within Avaya, as well as Business Partners and Distributors.

The toolkit includes:

- Syntelate sales propositions
- Syntelate product suite overview
- Product description
- How to offer Syntelate

The Inisoft sales and product team are on hand to support and help you through the sales process, from first contact through to project planning and delivery.

We also have additional support material available upon request including PowerPoint slides and customer case studies.

For more information, please see [contact details](#) at the end of this document.



## Syntelate Sales Propositions

Syntelate can be used by any contact center irrespective of the market sector; however the primary target markets are:

- Financial services companies
- Outsource telemarketing bureaus
- 3<sup>rd</sup> party service providers and outsourcers
- Telecoms companies and their major resellers
- Utility companies
- Automotive retail and servicing outlets
- Legal services
- Retail and charity fundraising

## Recognizing the Opportunity

To quickly recognize an opportunity for Syntelate within your existing customer base or else a new business opportunity, you will need an understanding of the issues that Syntelate can address. This section of the document outlines a number of the key benefits of Syntelate for both inbound and outbound calls.

Syntelate opportunities can be found in small, medium, or large contact center operations and can be quickly identified where there is a requirement for:

- Rapid development and deployment of agent desktop screens (with or without scripting) for inbound, outbound, or blended environments
- Multiple campaign screens or scripts being used simultaneously
- Consolidation of multiple applications into a more “agent” friendly interface, which consolidates the overall number of screens the agent has to access during a call in order to complete their task
- Provision of intuitive agent screens used as a front end to legacy database systems, e.g. mainframe applications
- Continuous updating or modification of screen designs as the business requirements of the contact center change or evolve
- Provision of customized desktop screens to support outbound telemarketing scenarios, with or without a dialer
- Procedural control or scripting of agent activity when talking to customers, especially useful for **compliance** in the financial and government sectors
- Targeted up-sell and cross-sell campaigns to an existing customer base



## Syntelate Benefits: Meeting the Need

Here are some examples of common business issues that Syntelate can help to address.

Business Issue	Syntelate Benefit
<p><b>We need to reduce agent talk time</b></p> <p><i>“Our agents seem to be taking longer than expected when speaking to the customer. Their feedback indicates that the information they require to answer the customer’s questions is not quickly available to them.”</i></p>	<p>Using Syntelate scripting in conjunction with Syntelate details pages can guide the agent through the conversation with the customer and automatically present them with the information they require to answer the customer’s questions.</p>
<p><b>Improved First Call Resolution (FCR)</b></p> <p><i>“We find that our agents are setting too many customer callbacks as they cannot deal with the customer’s requirements during the first call. This is having a negative effect on customer satisfaction levels and the cost to serve.”</i></p>	<p>Providing agents with a Syntelate call script dynamically linked to supporting information has been proven to increase FCR results. Syntelate can help deliver the right information to the agent at the right part of the call.</p>
<p><b>Informed and knowledgeable agents</b></p> <p><i>“Feedback from our customers indicates that our agents are seen as poorly informed and unknowledgeable. This is clearly seen when a customer speaks to an agent who has no information on the previous customer interactions.”</i></p>	<p>Syntelate provides the agent with any notes or relevant information captured on previous calls with the customer. This information can be shown at the start of the call or displayed as historical information should the agent need to refer to it. Evidence shows that an informed agent is more confident during the call and this can increase customer satisfaction levels.</p>



### Reduced training time

*“When we recruit a new member of staff they undergo a 6 week training program before they start to take live customer calls. It then takes another 8 weeks before they are working at full potential. Reducing training time will save us money and increase the performance of the business.”*

Using Syntelate to guide agents through the call, whilst providing them with the supporting information they require, reduces agent training time. Enforcing call procedures, reducing the options that the agent can select, and automatically determining the call outcomes all assist in training an agent more quickly.

### Rapid campaign and script design

*“Our calling campaigns change very quickly and place a heavy workload on our IT department to update the supporting systems.*

*“We are also asked to introduce new campaigns into the business at very short notice.”*

Syntelate provides the ability to quickly create new call campaigns and to modify/update existing campaigns. Using the drag-and-drop design tools, changes can be made and deployed to the agents without delay. Live campaigns can then be copied and updated while the agents continue handling calls.

The comprehensive Syntelate Designer training course provides you with the skillset to build and manage your own campaigns.

### Unified Agent Desktop

*“We have a number of databases and applications that our agents need to access when on a call. Switching between each system is cumbersome and lengthens the duration of the call.”*

Reducing the number of screens and applications that the agent needs to use during a call is a clear route to reduce talk time, increase productivity, and improve customer satisfaction. The powerful integration tools available in Syntelate allow you to present data from 3<sup>rd</sup> party applications to the agent while still on the Syntelate screens.



### Compliance and procedural control

*“Compliance is a major part of our industry. All of our calls are quality-checked to ensure that our agents are following the correct procedures and meeting the compliance standards.”*

Delivering compliance, following business procedures and, where required, providing verbatim scripting for the agents are standard functions within Syntelate. Using powerful script branching and conditional logic, Syntelate can enforce that agents read and obtain acknowledgment from the customer that they have covered all compliance statements. Without recording the acknowledgement, the call flow script will not proceed to the next step.

### Cross and up-selling

*“A major failing within our contact center is the ability to effectively handle up-selling opportunities. Some agents are very good but others struggle to make the transition, despite extra training and buzz sessions.”*

The design tools within Syntelate contain a comprehensive conditional logic engine, which allows you to decide the next step of the call flow based on the data you already have about the customer. This is a powerful tool that can be used to present the agents with the correct up-sell opportunity at the right part of the call. Conditional logic can help present the up-sell opportunities that are most relevant to the customer and therefore have the greatest chance of a successful outcome.

### Paper call guides

*“Our agents still use and rely on paper scripts and product sheets. This causes a major printing overhead when things change, as well as slowing down the call process.”*

Syntelate removes the requirement to have paper-based scripts and product sheets. Any changes required can be made and deployed to all agents without delay.



## Business Scenarios and Sectors

### Finance: Banking

- Used by the third largest bank in the world to service its existing customer base. Syntelate is used to manage calls to clients for collections and cross-selling opportunities on its mortgage products.
- Several large banks in the Middle East use Syntelate to provide marketing information to their existing clients.

### Telecommunications

- Syntelate is used by some of the largest mobile telecoms providers in EMEA (Europe, the Middle East, and Africa) and most extensively in collections, retention, and cross-sell scenarios.
- A major telecoms provider in the Middle East uses Syntelate campaigns in Arabic to manage customer services and sales.

### Retail: Online and Catalogue

- A global online retailer in Germany uses Syntelate within its contact centers to manage customer services, up-sell, and appointment setting.
- Syntelate is used by major online retailers in the UK to assist with collection, sales promotions, payments, and customer services.

### Outsourcers

Syntelate is widely used by some of the largest outsourcers in EMEA. The campaigns covered range from sales to services and from information provision to collections.

The outsourcers cover a wide range of business sectors, including:

- Finance
- Insurance
- Utilities
- Telecommunications
- Helplines
- Local and central government services



Location	Customer	Syntelate Agents	Types of Call
USA	A major American bank	200 concurrent agents	Debt realignment, loans, mortgages, taking payments for loans or other outstanding debt
Canada	Major online and high street retailer	180	Customer service, retention. Taking payments for goods or other outstanding debt
UAE	Large bank in the Middle East	185	Mortgage sales, customer services, debt management
UK	Large UK branch call center for major international bank	150	Customer services
Kuwait	One of the largest communications companies in the Middle East	50	Customer services and cross-sell
UK	Major outsourcer	375	Wide variety of call types and business sectors
UK	Catalogue retailer	300	Sales, services, collections, and returns
USA	Loan arranger and debt collection	800	Debt realignment, loans, mortgages, taking payments for loans or other outstanding debt
Saudi Arabia	A national bank	100	Debt realignment, loans, mortgages, taking payments for loans or other outstanding debt



## Pre-sales Support and Product Demonstrations

Inisoft can provide full pre-sales support and product demonstrations to assist in the sales process. The support available will depend on the opportunity size, location, and stage of the sales process. Support includes:

- Assistance with “requests for information”
- Assistance with RFPs, including answering the technical and business questions around Syntelate
- Inisoft participation in sales calls with the customer
- Product presentations
- Product brochures
- Product overview and positioning video
- Syntelate product demonstration videos
- Assistance with “statements of work”
- Syntelate customized product demonstrations
- Online demos using WebEx or similar tools
- Face-to-face onsite demo (where justified)
- Full professional services and training quotations
- Assistance with solution pricing

For more information about Syntelate and partnership with Inisoft, please see [contact details](#) at the end of this document.



## Syntelate Product Suite Overview

Syntelate is an advanced yet highly intuitive desktop application designed for inbound, outbound, or various types of blended contact center environments. It provides all the tools and features necessary for designing business-specific agent desktop screen layouts with the option of linking these together as call flow controls or scripts. Syntelate can provide highly customized screens, making campaigns more effective and ensuring agents are able to offer a superior service to customers.

Together with its capability to integrate to backend database systems such as Oracle and MS SQL Server, the use of Syntelate to complement products such as Avaya POM, Avaya Proactive Contact, Communication Manager via Avaya Application Enablement Services (AES), or Avaya IP Office platforms can add significant value to contact center operations.

The Syntelate portfolio of products has an extensive list of functionality, providing many features to facilitate the rapid creation of campaign screens aimed at increasing agent effectiveness and productivity. Syntelate is compliance tested through Avaya's Global Developer Connection (DevConnect) initiative of which Inisoft is a Platinum member.

Syntelate brings full control of the agent desktop to Managers and Supervisors who are responsible for the smooth running of contact center operations. It allows for the creation of both agent screen designs and call flow scripts in a single powerful application, making full use of existing investments in both telephony and database/CRM systems.

The Syntelate agent desktop is available in two deployment options:

- (1) Web-based (thin client): Syntelate WebAgent for POM
- (2) Thick client: Syntelate Enterprise Agent for POM

Syntelate WebAgent has two separate versions: Basic and Pro. Enterprise is only available in the Pro version.

### Syntelate Designer

A minimum of 1 Designer license is required per project. Designer is used to create and configure the Syntelate scripts, details pages, and call flows.



## Syntelate Basic Agent

The Basic Agent allows deployment of a basic desktop for an outbound-only environment. This product supports simple scripting with a single page of data from the POM contact list. This product is available for web deployment only.

## Syntelate Agent Pro

Syntelate Agent Pro allows access to the advanced desktop and scripting features of Syntelate. This product fully supports inbound/outbound blending, providing a unified agent interface over both channels. Choose your deployment method with either our web- or Windows-based Agent.

## Agent Functionality

The features of the various desktop models are as follows:

	Basic	Pro (Web Client)	Pro (Windows Client)
<b>Architecture</b>			
• Client server	x	x	✓
• Browser-based application	✓	✓	x
<b>Integration</b>			
• Rapid Integration Tool (RIT) supported	x	✓	✓
• Client-side SDK available for purchase	x	x	✓
• Server-side SDK available for purchase	x	✓	x
• Parameters passed from Syntelate to web page	x	✓	✓
• Run external application	x	✓	✓
<b>POM 3.X</b>			
• Disposition codes via on-screen buttons	✓	✓	✓
• Support of multiple POM systems	✓	✓	✓
• “Agent log off” reason code display	✓	✓	✓
• “Do not call” feature	✓	✓	✓



• Preview modes (timed/untimed)	✓	✓	✓
• Wrap-up time (timed/extendable)	✓	✓	✓
• Schedule a call back	✓	✓	✓
• Context-sensitive agent toolbar	✓	✓	✓
• Call state timers	✓	✓	✓
• Consult/conference/transfer	✓	✓	✓
• Walk away	✓	✓	✓
• High availability	✓	✓	✓
<b>Database Interaction (MS SQL Server or Oracle)</b>			
• Save call data to database	x	✓	✓
• Link to external data sources	x	✓	✓
• Database lookups for dropdowns	x	✓	✓
• Database search	x	✓	✓
<b>Layout</b>			
• Configuration of background colors	✓	✓	✓
• Configuration of background color gradient	✓	✓	✓
<b>Functionality</b>			
• Script logical branching	✓	✓	✓
• Support of single details page	✓	✓	✓
• Support of multiple details pages	x	✓	✓
• Conditional logic	x	✓	✓
• Edit mask support (validate data entry)	✓	✓	✓
• Display of image files, e.g. logos, pictures	✓	✓	✓
• Embedded web pages	x	✓	✓
• Calculated fields	x	✓	✓
• Edit box control	✓	✓	✓



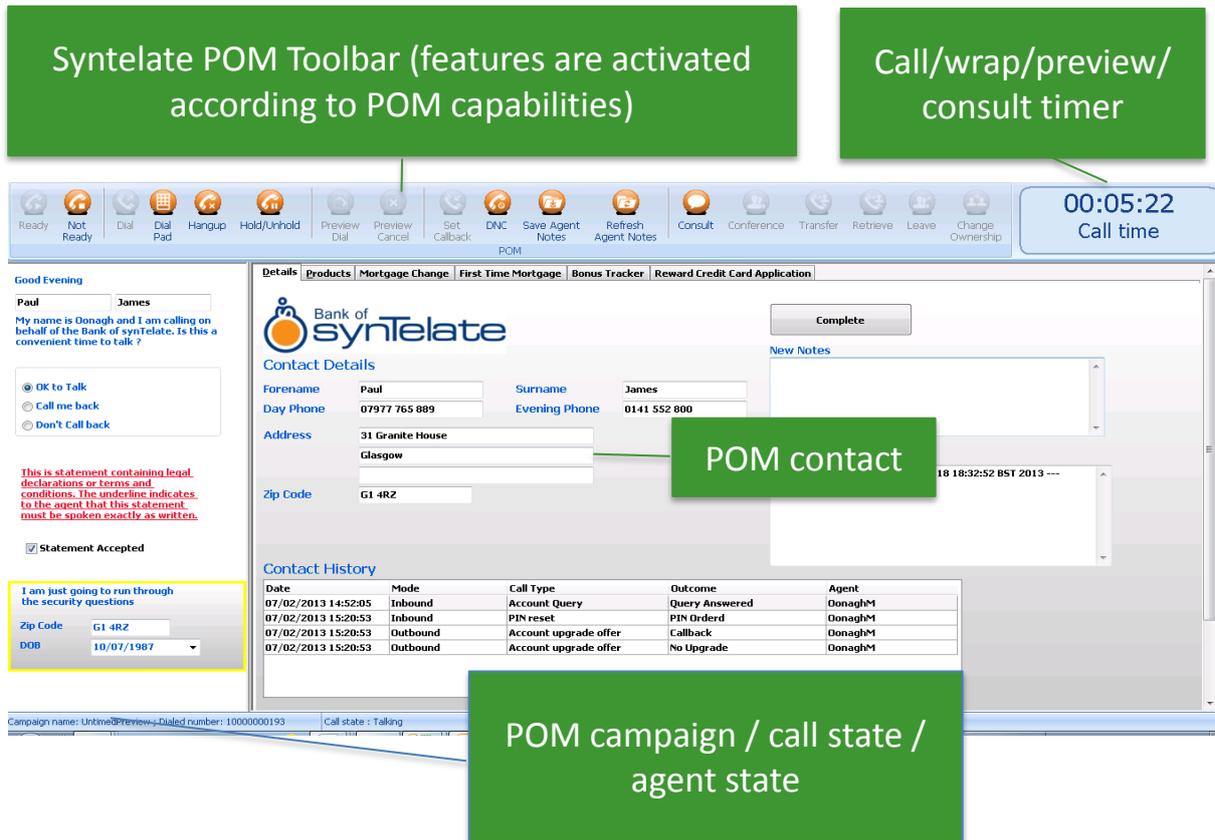
• Number control	✓	✓	✓
• Check box control	✓	✓	✓
• Dropdown control	✓	✓	✓
• Database lookups for dropdowns	x	✓	✓
• Radio buttons	✓	✓	✓
• Memo (large text field with word wrap)	✓	✓	✓
• Date field	✓	✓	✓
• Time field	✓	✓	✓
• Label	✓	✓	✓
• Data grids	x	✓	✓
• Card view display for data grids	x	x	✓
• Campaign import/export	✓	✓	✓
• Multiple campaign support	✓	✓	✓
<b>Inbound Screen Pop</b>			
• Screen pop according to DNIS	x*	✓	✓
• Record matching in existing Syntelate call data	x*	✓	✓
• Record matching in external database tables	x*	✓	✓
<b>Inbound Call Control</b>			
• Answer / hang up / dial / hold	x*	✓	✓
• Transfer	x*	✓	✓
• Consult/conference with another agent sharing data	x*	✓	✓
<b>POM Blend</b>			
• Supports POM inbound/outbound blend	x*	✓	✓

*\*blending will be made available to the Basic version of Syntelate for countries excluding Western Europe, USA, Japan, Australia, New Zealand, and South Africa where there is a minimum 50 agent purchase.*



## Product Description

The product screenshot below illustrates some Proactive Outreach Manager specific features on the Syntelate desktop.



The screenshot displays the Syntelate Proactive Outreach Manager (POM) desktop interface. A toolbar at the top contains various call control icons such as Ready, Not Ready, Dial, Dial Pad, Hangup, Hold/Inhold, Preview Dial, Preview Cancel, Set Callback, DNC, Save Agent Notes, Refresh Agent Notes, Consult, Conference, Transfer, Retrieve, Leave, and Change Ownership. A call timer in the top right corner shows 00:05:22. The main window is titled 'Bank of syntelate' and shows 'Contact Details' for a contact named Paul James, with fields for Day Phone, Evening Phone, Address, and Zip Code. A 'Contact History' table is visible below the details. A 'POM contact' label points to the contact details section. A 'POM campaign / call state / agent state' label points to the bottom status bar, which shows 'Campaign name: UntimedPreview' and 'Dialled number: 10000000193'. A 'Call/wrap/preview/consult timer' label points to the top right timer. A 'Syntelate POM Toolbar (features are activated according to POM capabilities)' label points to the top toolbar.

**Syntelate POM Toolbar (features are activated according to POM capabilities)**

**Call/wrap/preview/consult timer**

**POM contact**

**POM campaign / call state / agent state**

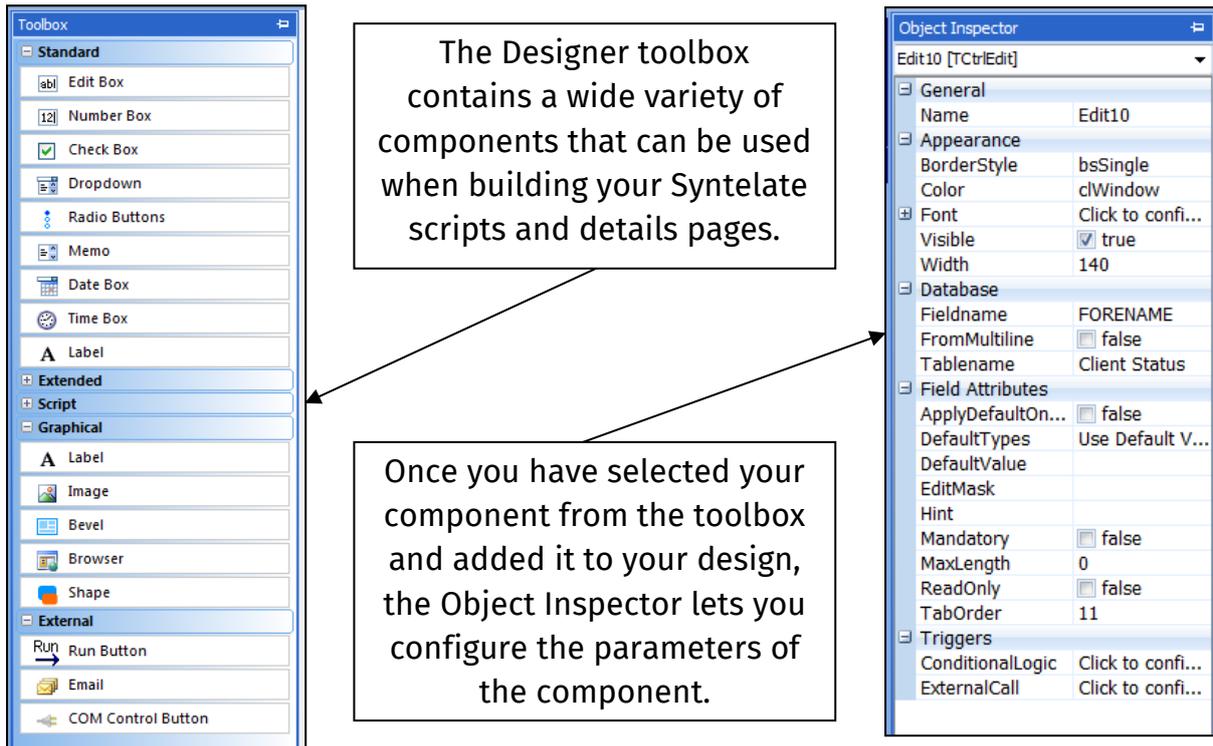
Date	Mode	Call Type	Outcome	Agent
07/02/2013 14:52:05	Inbound	Account Query	Query Answered	DonaghM
07/02/2013 15:20:53	Inbound	PIN reset	PIN Orderd	DonaghM
07/02/2013 15:20:53	Outbound	Account upgrade offer	Callback	DonaghM
07/02/2013 15:20:53	Outbound	Account upgrade offer	No Upgrade	DonaghM



## Features

### Screen Layouts

Syntelate Designer provides the tools to create highly customizable agent screens. The many design tools and configurable parameters provide the user with easy-to-use drag-and-drop components.



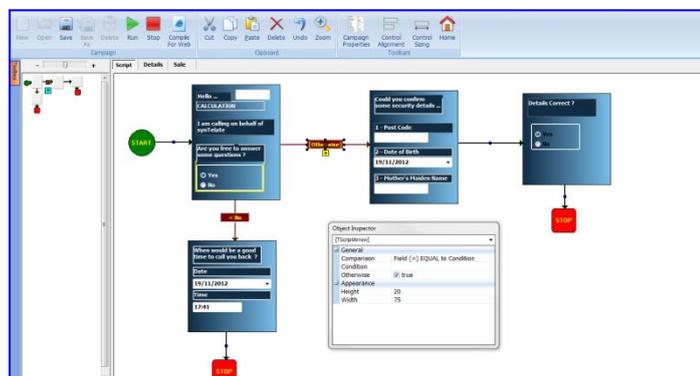
The Designer toolbox contains a wide variety of components that can be used when building your Syntelate scripts and details pages.

Once you have selected your component from the toolbox and added it to your design, the Object Inspector lets you configure the parameters of the component.

Object Inspector	
Edit10 [CtrlEdit]	
General	Name Edit10
Appearance	BorderStyle bsSingle
	Color clWindow
	Font Click to confi...
	Visible <input checked="" type="checkbox"/> true
	Width 140
Database	Fieldname FORENAME
	FromMultiline <input type="checkbox"/> false
	Tablename Client Status
Field Attributes	ApplyDefaultOn... <input type="checkbox"/> false
	DefaultTypes Use Default V...
	DefaultValue
	EditMask
	Hint
	Mandatory <input type="checkbox"/> false
	MaxLength 0
	ReadOnly <input type="checkbox"/> false
	TabOrder 11
Triggers	ConditionalLogic Click to confi...
	ExternalCall Click to confi...

### Call Flow Scripting with Conditional Branching

This provides in-call prompts and guides to help the agent achieve campaign objectives. While the call flow script is not mandatory, the additional call control, use of branching, and conditional logic makes it a highly effective aspect of the Syntelate solution.



During a call the agent can enter responses to questions with further options provided which are conditional on the choices entered. This is referred to as “conditional branching” and provides a means of developing sophisticated call flows to ensure calls are handled effectively and efficiently.

Adding to the conditional branching function, conditional logic can be configured to perform data validation and to populate other fields automatically based on previously entered information.

Conditional logic allows designers to evaluate for a condition and then set actions based on these evaluations.

### Links to Databases

Standard functionality provides links to Oracle or Microsoft SQL Server databases. Other links are possible using appropriate ODBC drivers or application APIs. This functionality is supported for Syntelate Enterprise Agent and Web Agent Pro only.

### Syntelate Wizard

Syntelate includes an easy-to-use Wizard designed to connect to the Proactive Outreach Manager contact call list (campaign) and to help speed up the process of associating the Syntelate database fields with the call list data fields and attributes in the dialer.

The standard Campaign Wizard can be used to create the underlying database table supporting a Syntelate campaign. Field names, data types, and sizes can all be set using the Wizard. Existing campaign tables can also be edited using this tool, e.g. where an additional data field is required on a details page.

### “Live” and “Design” Campaigns

Two versions of a campaign can exist at any time: the “live” campaign and the “design” campaign. This allows you to work on edits to the design campaign while agents continue to use the live campaign in the production environment.

Once the design campaign has been fully tested, you make it the new live campaign. Agents then automatically start using this from their next call in Syntelate.

This feature greatly reduces downtime and removes the requirement for agents to log off the system when changes are needed.



## Multiple Campaign Support

Many different campaigns can be live at the same time. This is particularly important for outsource telemarketing providers who are working for several different clients at the same time.

## Campaign Maintenance

Campaigns can be duplicated (save as), deleted, or archived for future use. “On-the-fly” changes to campaigns are possible without having to stop calls or get agents to log out of the system.

## Component Types

Syntelate supports the use of the following components: calculation, check boxes, date, dropdown, edit box, memo, multi-line, number, picture, radio button, run button (Enterprise Agent (EA) only), search button (EA only), time field, web browser auto-time-based greeting (“Good Morning” or “Good Afternoon” etc., English only). Note that some components may not be available in Syntelate Web Agent.

## Browser Component

Syntelate includes a useful browser component which allows you to include web pages as part of the Syntelate campaign. This takes away the requirement of the agent to exit Syntelate and launch a separate browser session. Using Syntelate to pass parameters from the customer record to the browser adds another layer of efficiency that has been proven to reduce call times. For example, you could pass customer account details to a web application that then shows the latest customer information web quote.

## Context-sensitive Toolbar



The toolbar buttons available to the agent during the call are determined by the call and agent state at any given time. The toolbar is fully integrated into Proactive Outreach Manager through the Avaya API.



Proactive Outreach Manager capabilities have been fully implemented so that the agent can only select options that are relevant to their current state. For example, **Conference** is not shown until you are successfully on a consult and **Hang up** is not available during preview. **Preview Cancel** and **Set Callback** can be made inactive via the Avaya Experience Portal.

### Agent Call Status Bar

Agents are more effective if they have a clear picture of the environment they are working in. On the Syntelate screen the agent is given a real-time view of their current status within Syntelate and Proactive Outreach Manager.



**Additional Information:** Shows the name of the Syntelate campaign, the number dialed and, where appropriate, the name of a consulted agent.

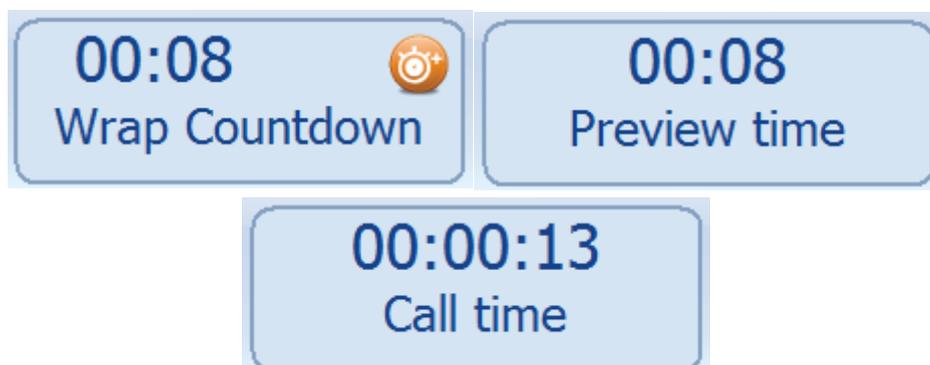
**Agent State:** Shows whether the agent state is ready, pending not ready, not ready, or idle.

**Call State:** Shows the current state that the call is in: Preview, Talking, Consult, etc.

**Nail Up State:** Shows the nail-up state of the agent.

### On-screen Timers

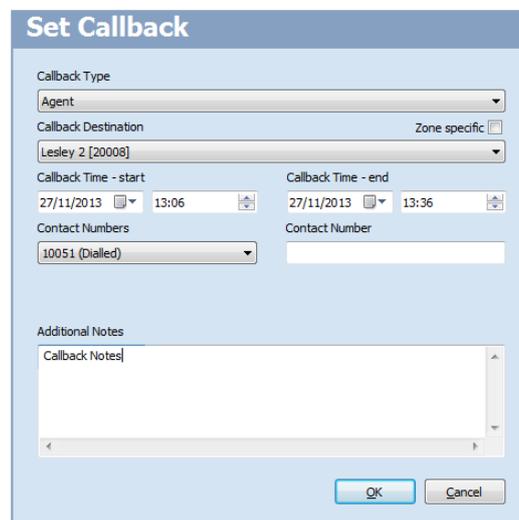
A visual timer shows the agent the length of time that they have been in a particular state, for example Preview, Call, Consult, Conference, or Wrap.



This is useful for agents who are targeted on reducing call handling and wrap time.

## Callbacks

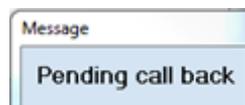
Syntelate allows the agent to set callbacks at any point during a call. Callbacks can be set against a specific agent or allocated to a Proactive Outreach Manager campaign. The agent can record notes that will be made available to the agent who fulfills the callback. Each callback also has an end time to indicate when the callback should expire. Callbacks can be made to any existing customer contact number or the agent can manually enter an alternative number. Multiple callbacks can be created during the same call, the previous being overridden by the latest set.



The 'Set Callback' dialog box contains the following fields:

- Callback Type: Agent (dropdown)
- Callback Destination: Lesley 2 [20008] (dropdown), with a 'Zone specific' checkbox.
- Callback Time - start: 27/11/2013 13:06 (calendar and time pickers)
- Callback Time - end: 27/11/2013 13:36 (calendar and time pickers)
- Contact Numbers: 10051 (Dialled) (dropdown)
- Contact Number: (empty text field)
- Additional Notes: Callback Notes (text area)
- Buttons: OK, Cancel

When an agent is about to receive a callback, they will receive a warning while on their preceding call:



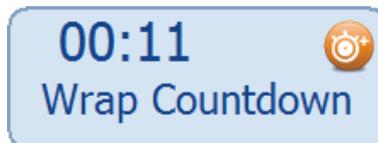
When the callback is sent to the agent, they will be given the opportunity to preview for a configurable time before the call is made. This gives the agent the chance to review the callback notes and customer data. This ensures that the agent is fully informed of all relevant information leading to a better customer experience.



## Wrap Up

When the customer or agent hangs up the call, the agent is put in wrap-up. During wrap-up, the agent can complete data entry and select the relevant completion code.

If the Proactive Outreach Manager campaign is configured with a wrap-up timeout, Syntelate will count down and, on reaching 0, close the call automatically with a default completion code. If extensions are allowed, Syntelate provides a **More Time** button.



## Call Completion

Completion buttons can be assigned disposition codes by the script designer to improve accuracy and reduce agent wrap time. Alternatively, if appropriate, the agent can choose from a valid list of disposition codes.

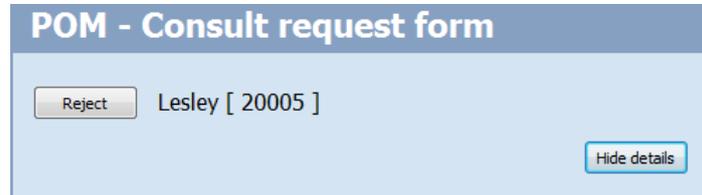
## Consult

Consulting with another agent or external resource is straightforward using Syntelate and Proactive Outreach Manager.

The consult tool allows the agent to place the customer on hold and initiate a consult session with a third party. The third party can either be another agent on the same Proactive Outreach Manager campaign or an external number from the Proactive Outreach Manager phonebook.

A light blue dialog box titled "Consult". It has two tabs: "Agent" (selected) and "External". A "Refresh" button is in the top right. Below the tabs is a list box containing one entry: "Paula [20006] Available Talking". Below the list box is a "Contact number:" label and a text input field containing "20006". At the bottom are "Consult" and "Cancel" buttons.

If consulting with a Proactive Outreach Manager agent, then that agent will be notified of the consult request in Syntelate. The notification will persist until the consult is initiated or the agent chooses to reject the consult request.



The screenshot shows a web interface titled "POM - Consult request form". It features a "Reject" button on the left, the text "Lesley [ 20005 ]" in the center, and a "Hide details" button on the right.

On an agent consult, both members of the team share the same customer screen and data. The consult initiator can update the data via the Syntelate **Update Record** function. Both agents also have the ability to enter and view agent notes.

The call can then either be transferred to the third party or a three-way conference initiated with the customer. Ownership of the conference can be transferred to the other agent who will then have control of the call. The third party will have the ability to leave the consult or conference at any time.

### Agent Notes

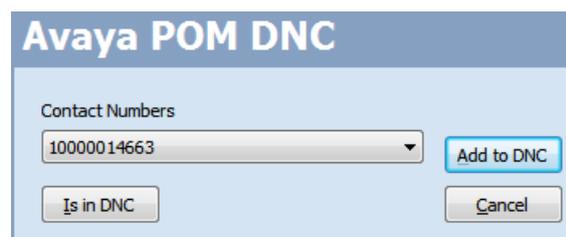
The agent can view and add data to the **Agent Notes** field attached to the current contact. Agent notes are extremely useful for recording information to be used during callbacks. In a consult or conference scenario, both parties can capture and share notes on the current call.

### Update Record

Syntelate allows the agent to update the Proactive Outreach Manager contact record at any point during the call via the **Update Record** function. Any data that fails to meet Proactive Outreach Manager data validation will be flagged to the agent to rectify. The update function is particularly important during a consult or conference to allow the latest data to be shared between the agents involved.

### DNC (Do Not Call)

Customers who no longer desire to be contacted by the vendor can choose to be added to the Do Not Call list.

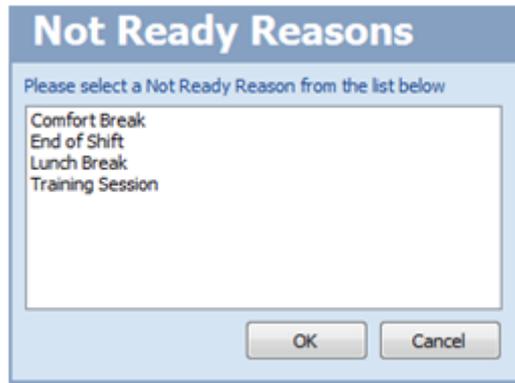


The screenshot shows a web interface titled "Avaya POM DNC". It includes a "Contact Numbers" dropdown menu with the value "10000014663", an "Add to DNC" button, an "Is in DNC" button, and a "Cancel" button.

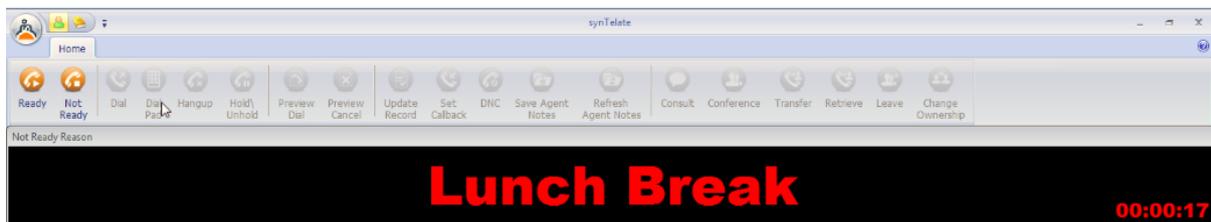


## Not Ready

Syntelate lets you specify your own custom “not ready reasons”. Each time an agent wishes to make themselves unavailable to Proactive Outreach Manager, they click the **Not Ready** button and are then asked to select one of the not ready reasons:



Syntelate can display large headline banners and a timer showing the reason why an agent is not working on a campaign, allowing Supervisors and Managers to be better informed of resource availability.



## Proactive Outreach Manager Unavailable

If Proactive Outreach Manager becomes unavailable, Syntelate will not allow the agent to interact and will show an appropriate banner. When Proactive Outreach Manager becomes available again, Syntelate will confirm the current call and agent status and allow the agent to continue with the interrupted activity.

## Walk Away

An agent will be assumed to have walked away if two successive Proactive Outreach Manager calls are processed without any agent interaction in Syntelate. The agent will be put into a Not Ready state and the walk away banner will be displayed.





## Dial Pad

The dial pad can be used for any menu-based telephone system that requires key input, for example “Press 1 for x, press 2 for y”.

## Localization

The Syntelate Designer application, menus, and all help files are currently only available in English. However, when installed on a PC, Syntelate Designer is compatible with all local configuration for the PC, including any language or keyboard settings. This means that Syntelate Designer can be used to build agent screens and scripts using the local language used by the PC.

Syntelate Agent can be fully localized; there are versions of the application menus and internal system messages for:

- English
- French
- German
- Polish
- Russian
- Arabic
- Slovak
- Spanish
- Italian

The menus and internal system messages for Syntelate Agent can also be translated for a specific language on request.

## Syntelate Technical Requirements

The technical requirements for Syntelate can be downloaded from the following web page:

<http://www.inisoft.com/syntelate-technical-product-requirements/>



## How to Offer Syntelate

This section of the document describes:

- How to include Syntelate within your sales proposal
- The licensing model for Syntelate
- How to engage with professional services
- Syntelate support and maintenance contracts

### Syntelate Licensing

All Syntelate products are licensed on a concurrent user basis with licenses issued for a permanent right to use Syntelate. Fixed-term temporary licenses can also be issued in certain circumstances.

License files are site-specific and encrypted and must be installed on the end user network in a location that will be “visible” to all agent workstations.

Syntelate Web Agent/Web Agent Pro and Syntelate Enterprise Agent *can* co-exist on the same installation, offering full deployment flexibility to the end user.

License files are issued directly from Inisoft at the time of the initial software installation.

### Syntelate Professional Services

Professional services associated with the implementation of Syntelate can be ordered through Avaya and will be delivered by fully trained Avaya staff, certified Inisoft Business partners, or by a Syntelate specialist from Inisoft.

Deliverable highlights are:

- **Syntelate software installation:** All server-side installation work relating to Syntelate is completed by an installation engineer. A number of client-side installations are also carried out with the customer ensuring that there is adequate skills transfer to nominated technical staff. This means that the client-side roll-out of the Agent can then be completed at a later date by in-house staff.
- **Training for Designer users:** This can be for up to 4 nominated staff on any one course (duration 2 days). Agent training is not standard but can be supplied.



- **Database configuration:** All necessary database tables and configuration data will be set up as part of the initial Syntelate database build. Note however that the database software must have already been installed onto the server hardware prior to the Syntelate consultant arriving on site.
- **Consultancy services** covering analysis and advice on script and screen design requirements.
- **Workshop sessions** covering the creation of initial script and screen designs using Syntelate Designer. Typically the workshop days are scheduled to immediately follow the two-day Designer training course.
- **Software customization** to provide links to third-party applications where agreed as part of the Scopes of Work (SoW).
- Inisoft can supply **onsite and remote “go live support”** for the customer to ensure that any unexpected issues or questions can be quickly resolved.
- **Project Management** including initiating, planning, executing, controlling, and project closure, through to system solution validation testing.

### A Typical Example of a Syntelate Project

The following is an indicative guide for a standard Syntelate implementation project at a single site with no third-party integrations. This involves 13 professional service days as follows:

- 2 days for initial planning and agreement of overall Scopes of Work and Project Plans
- 1 day to cover the installation of Syntelate at the customer site
- 2 days to cover the Syntelate Designer training at the customer site
- 1 day to cover the Syntelate/dialer configuration, also known as “dialer handshake day” (allowance is for a single dialer)
- 3 days script and screen design workshop consultancy
- 2 days to cover “go live” support for the contact center’s first days of using Syntelate in the live environment
- 2 days for technical project management support



## Support & Maintenance

All proposals and offers for the supply of Syntelate include a Support & Maintenance charge alongside any quotes for license sales and professional services. The following support options are available:

**Standard Support:** Monday to Friday 8:00am to 6:00pm site local time

**24/7 Support:** Full 24/7 cover excluding Christmas and New Year's day

The Support & Maintenance charge for Syntelate includes free of charge supply of all like-for-like software updates. Any additional professional services required by end users to install updates will be chargeable at standard day rates.

**Note:** The Syntelate support contract starts from the date of install and training on the customer site. This may differ from the Avaya Proactive Outreach Manager support contract.

## Pricing Information

Below is the list of all material codes for Syntelate:

SAP Code	Description
305354	SYNTELATE DESIGNER FOR POM
391452	SYNTELATE BASIC FOR POM
391453	SYNTELATE PRO (Web or Enterprise) FOR POM
391454	SYNTELATE UPG BASIC TO PRO FOR POM

Full details of pricing for Syntelate licenses, professional services, and the Syntelate support and maintenance contracts are available through the normal Avaya channels.



## What Does a Syntelate Order Look Like?

A Syntelate order placed with Inisoft must include all of the following elements:

- Syntelate Designer licenses (minimum 1 license)
- Syntelate Agent licenses (Basic or Pro, number of licenses = number of concurrent users)
- Syntelate professional services to cover install, set-up, and training
- Syntelate annual support contract

## Inisoft Contacts

Commercial, pre-sales, and sales inquiries: [sales@inisoft.com](mailto:sales@inisoft.com)

Project and product support inquiries: [support@inisoft.com](mailto:support@inisoft.com)

## Supporting Material

Technical requirements: <http://www.inisoft.com/syntelate-technical-product-requirements/>

Syntelate video and data sheet: <http://inisoft.com/contact-center/syntelate/>

