APTEAN

WHERE SOFTWARE WORKS

TRANSFORM YOUR COMPLAINTS HANDLING WITH RESPOND 6.0.1

BROCHURE

RESPOND

Are you considering transforming your complaints and feedback operating model? Do you want to create efficiency gains? Do you need to gain a firm grip on the process but not sure how moving from your version 3 Respond system to the latest release of Respond will help? Read on to find out how you can reduce the time it takes to move between versions whilst understanding how the new capabilities can provide your organisation with advantages that show tangible results.

"Great discoveries and improvements invariably involve the cooperation of many minds."

Alexander Graham Bell

Respond 6 and its new version 6.0.1 are not the brainchild of a single Aptean team member; it is the collective cognitive power of you - the Respond user community – plus the Aptean team and over 20 years of experience in the complaints and feedback arena. This collective is made up of the connoisseurs of our industry who have tailored the extensive list of potential capabilities to provide tangible advantages that you, the Respond user community, can leverage to transform your complaints and feedback operation.

When discussing Respond 6 and 6.0.1, we are faced with the difficult task of knowing just where to start with such a large feature set. We have selected just some of Respond's best features and grouped them into four sections which will hopefully help you envisage how you might apply Respond in your operation today:

Operational Improvements - capabilities that improve the day-to-day handling of a case. They oil the wheels of your case processes to make them run smoothly.

- Flexible Licence Model
- Enhanced Reporting
- Respond Scheduler
- Expanded Real Estate

Improved Usability - the key to the success of any solution can be gauged in its adoption by the user community. Ease of use wins the hearts and minds of the potential user community, increasing usage and providing an ongoing return on your investment.

- Tablet Compatibility
- Advanced Agent
- User Group Homepages
- Derived Fields
- Respond Self-Serve
- Configuration Manager

Improved Governance - an ounce of prevention is better than a pound of cure and so Respond has provided capabilities to assist you in your quest to ensure consistent, repeatable and compliant case processing and outcomes.

- Cost Authorisation
- Systemised Fulfilment Process
- Case Process and Business Rules
- Editable Paragraphs

Technical Modernity - change for change's sake is often unnecessary, but there have been technological innovations over the years that reduce your total cost of ownership whilst improving Respond.

- Enhanced Migration Tool
- Technology Stack Update
- Software as a Service (SaaS)
- Extensible Platform
- Open Application Programmable Interface

OPERATIONAL IMPROVEMENTS

THE FEATURE: *Flexible Licence Model*

ADVANTAGES:

- Cost efficient user access

DESCRIPTION:

To be a success within any organisation, a software product needs to be used and be used by the majority. That is true for complaint and feedback solutions too. But there are a myriad of working practices in place within the Respond user community and no matter which individual licence model we choose it would of course not suit all. That is why Respond 6 is available with a hybrid of named and concurrent licences that cover all needs.

A named licence is ideal for users who spend a good proportion of their working day in Respond and concurrent licences are ideal for infrequent users.

The ability to mix and match these licence types provides a cost effective way for you to roll out Respond to all areas of your organisation.

THE FEATURE: *Enhanced Reporting*

ADVANTAGES:

- Removes the barriers between your data items
- Reduces the time taken to reconcile numerous reports

DESCRIPTION:

Those who are familiar with creating searches or reports in version 3 are well aware of the Chinese walls between areas within a case, for example attempting to provide contact, issue or aspect, cost and case information in the same search or report. Version 6 removes these restrictions and a single row in a tabulated report can contain data from all of these areas of Respond.

THE FEATURE: *Respond Scheduler*

ADVANTAGES:

- Reduces man hours by automating repetitive tasks
- Improves case tracking

DESCRIPTION:

In Respond 3, you could bulk reallocate cases and tasks but that was about the extent of its automation or batch processing capabilities. Respond's Scheduler changes that. Here are a few examples to help you understand what Scheduler can do for you:

- You can create a schedule to distribute reports and searches to users and non-users alike. Now key people in your organisation can receive Management Information straight to their inbox, keeping everyone informed from team leaders to heads of department.

- You can send email notifications to case owners to alert them when, for example, a note is added to the case, or tasks are getting close to or have breached their due date. They will never unknowingly miss an important case update or an overdue task.

- You can perform case escalations. If we suppose agents in the contact centre have a specific window of time to resolve a case, as that window expires the case is

automatically reallocated to the core complaints team. It removes the need to keep manually running a search twice a day to find and action such cases.

- You may want to keep an eye on issues resulting from a new product launch. Scheduler enables you to track certain categorisations and receive notifications if thresholds are breached e.g. if more than 10 cases are categorised as 'new product' an email will be sent with details.

- You may have a known issue that doesn't need an in depth investigation and such cases can be automatically progressed through the case process. You set the criteria for these cases and when it is met, Scheduler can move the case to the 'FastTrack' stage.

Respond Scheduler provides the capability to automate all these scenarios and is configurable so that it can be applied to tasks that make sense in your organisation, saving valuable man hours and improving the effectiveness of the complaints and feedback operation.

THE FEATURE: *Expanded Real Estate*

ADVANTAGES:

- Increased data capture

DESCRIPTION:

Your Respond 3 solution has a maximum amount of tabs, forms and fields and it is not uncommon for customers to begin to use the same field for numerous meanings, which invariably creates confusion when reporting. No longer: version 6 provides hundreds of tabs and hundreds of data fields to make sure you do not run out of real estate.

IMPROVED USABILITY

THE FEATURE: *Tablet Compatability*

ADVANTAGES:

- Improves the efficiency of your mobile staff
- Improves transparency for your customers when they interact with customer facing staff
- Increases the access to management information for senior managers and executives

DESCRIPTION:

Tablet devices such as iPads are in vogue these days, but they are far more than a fashion accessory. They enable customer facing staff to untether themselves from desks and emerge from behind counters to interact with customers in a more personable and transparent way: spin the tablet round and the customer can log their feedback there and then with your staff. Field based staff can instantly retrieve existing feedback records or create new ones as they visit customers and suppliers. Senior managers and executives have access to complaints and feedback data wherever they are, be it in their office, in the boardroom or at home.

Respond 6 support for tablet devices improves the customer experience, increases efficiency and enables real time insight from complaints and feedback data to be gleaned from any networked location.

THE FEATURE: *Advanced Agent*

ADVANTAGES:

- Increased user adoption
- Reduce the total cost of ownership
- Improves the customer journey
- Suitable for the Summary Resolution Communication

DESCRIPTION:

Advanced Agent provides a process lead mechanism for the capture and ownership of complaints and feedback. The process lead nature means it is intuitive and reduces the need for training making it suitable for infrequent users. The Advanced Agent experience is similar to many online transactional websites you may visit in your personal lives, for example, an airline's booking application. You are not trained in its use, but it is intuitive and you pick it up as you go along. All too often in the complaints and feedback arena the front of office is disconnected from the back office, which means a disjointed customer experience and often valuable feedback

slips through the gaps. Advanced Agent enables Respond to be pervasive in your organisation, encouraging all feedback to be captured centrally and much to be resolved at the first point of contact.

You will all know that your Respond CenterPoint application is designed to be configured by the business, or at least non-technical colleagues, that is until you wish to web enable version 3 (add browser based user interfaces known as TouchPoint and Handler), which requires more technical resources to configure. Respond version 6 is a browser based application, with Advanced Agent providing comparable features to that of TouchPoint and with Case Manager replacing Handler, and all of which are configured from the same tool: Configuration Manager. Configuration Manager is designed for business users to configure Respond. It does not matter if you are updating existing category lists or changing the flow of your call centre case capture, Configuration Manager configures it all.

Being able to configure all areas of Respond without the need for specific skills empowers you to be self-sufficient which in turn reduces the costs associated with enlisting third party services and ensures you are quick to adapt to change.

THE FEATURE: *User Group Homepages*

ADVANTAGES:

- Improved access to meaningful information
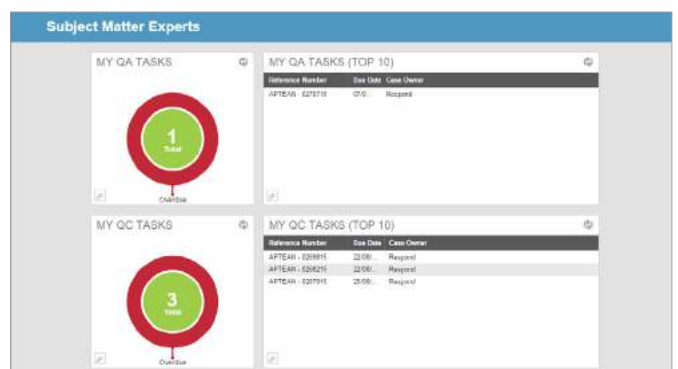- Improved team management

DESCRIPTION:

Respond 3 users are likely to be aware of its Diary feature which enables users to understand the tasks they have assigned with their relation to service levels. You will still find these in version 6 - they are called To Do Lists - but Version 6 goes beyond the Diary feature and provides each user group with its own view, or dashboard, that is interactive and filled with information that is appropriate to a users' role. Here are a few examples:

- Case Handler - the case handler's sphere of influence extends only to their own workload. This user's dashboard

would show the cases outstanding, their cases by stage, tasks that are overdue, all of which are graphically displayed and with the ability to drill into the cases themselves. A list of recent cases that have been quality checked with their score may also be presented.

- Team Leader - a team leader is concerned with one or more teams that have one or more case handlers. A team leader's homepage would consist of a rolled up view of outstanding cases and tasks, along with a view of performance, and cases received versus those resolved over a time dimension. They may also have a list of cases where the quality score is outside of thresholds, either above or below, along with a list of cases awaiting their approval.

- Customer Relations Manager - this individual's homepage would look at the longer term trends such as performance and root cause of complaints to identify and take action on trends as they appear.

Respond's homepage provides visibility into the information that matters most and enables users to understand what requires their attention, working smarter, not harder.

Respond 6 User Group Homepages

IMPROVED USABILITY

THE FEATURE: *Derived Fields*

ADVANTAGES:

- Improved usability
- Increased case throughput

DESCRIPTION:

Derived Fields means Respond can do more behind the scenes, preventing the need for users to explicitly complete fields of information. For example, you may have a first name field and a surname field: Derived Fields can link those fields to produce a 'full name' field. Considering costs: if you add £100 of redress and need to calculate the interest on it and then deduct the tax, but not only deduct the tax but also spilt the tax between several contacts on the case - Derived Fields can do that too.

These are a couple of examples to get your thought processes going. Derived Fields can be applied in all manner of ways (we will leave it to your ingenuity to create them) to remove the mundane and cumbersome tasks from your case handlers' routines so they can focus on their value add, great customer outcomes.

THE FEATURE: *Respond Self-Serve*

ADVANTAGES:

- Reduced data entry
- Improved customer experience

DESCRIPTION:

We live in a world where self-service is the norm and not the exception, so why should complaints and feedback be any different?

Respond's Self-Service is a module that simply plugs into your existing website and connects your customers directly with Respond. They can create and track their feedback when they want to, not just within your business hours.
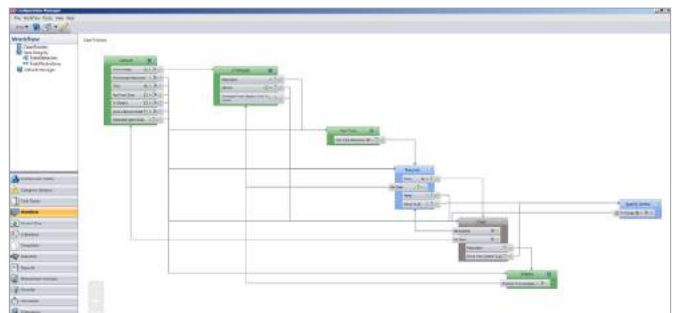
THE FEATURE: *Configuration Manager*

ADVANTAGES:

- Reduced total cost of ownership
- Empowers organisations to be nimble

DESCRIPTION:

A lot of the time, to be able to use the features we have covered, you would need to devote considerable time and energy to setting them up and maintaining them, not to mention developing them further once the initial project is completed. Not with Respond: Configuration Manager empowers you to configure Respond into the corners of your organisation without needing to code a single line.

Configuration Manager provides access to all of the configurable features in Respond. It is what Aptean consultants use to create industry templates and specific rules and case process for our customers. During a typical project, training is provided to ensure organisations are self-sufficient in the configuration of their Respond system. It is simply a point and click exercise to modify or create net new items - simply select 'new' from a menu and a wizard will guide you through the process. You do not need to understand databases, programming languages or even scripting, you need a logical mind and Configuration Manager training.

Configuration Manager

IMPROVED GOVERNANCE

THE FEATURE: *Cost Authorisation*

ADVANTAGES:

- Increased control and oversight of redress payments
- Improved consistency over redress paid

DESCRIPTION:

Respond version 6 provides an inbuilt Cost Authorisation feature to improve its 'cost' function. It provides each User Group with a limit on each item of redress and when exceeded, automatically seeks authorisation further up the User Group hierarchy.

Cost Authorisation is extensible to cater for more complex approval matrices, for example the redress limit for a user may differ based upon case data such as the nature of the complaint or the product or service being complained about.

With an authorisation process in place, user behaviour will be shaped to ensure consistency and prevent using redress as the 'easy fix' for complaints.

THE FEATURE: *Systemised Fulfilment Process*

ADVANTAGES:

- Reduces the potential for error in the redress fulfilment process
- Reclaims the man days effort lost reconciling data from disparate systems

DESCRIPTION:

A joined up fulfilment process goes together perfectly with Cost Authorisation. Once a cost is captured in Respond the payment needs to be made or fulfilled. In the past this often involved exporting searches and reports from Respond and providing them to a different department to fulfil the payment and in return, receiving a spreadsheet to update each case in Respond manually to denote the customer had received their redress. This is still feasible and in fact much of that process can be automated, or you can use Respond to communicate directly with fulfilment systems and have them update Respond automatically.

Automating the process is operationally efficient - it reduces man hours, and removes the potential for errors by completing repetitive tasks time and time again in the same way.

THE FEATURE: *Case Process & Business Rules*

ADVANTAGES:

- Improved consistency
- Improved control and oversight

DESCRIPTION:

From version 3.61 onwards, your Respond solution could use Status Manager which enabled the case status to be tracked. Version 6 of Respond has given these capabilities a boost to provide far broader case management capabilities.

The case process is now defined graphically and maps out the key stages, and each stage has rules to allow a case to enter or leave it. Your case process may not be a sequential set of steps, you may need to branch around them or different types of feedback may have differing stages: all can be accommodated.

Business rules cover anything from ensuring fields contain information at the appropriate time to the creation of decision

trees that help your users categorise cases correctly, or even offer solutions to issues.

These capabilities can be applied to solve a broad spectrum of issues that ultimately improve your control over the case process, exert influence over user behaviour, ensure your cases follow a consistent process and help you to understand your case pipeline.
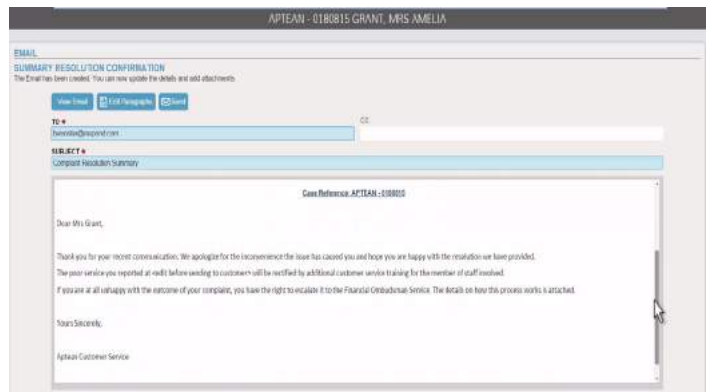
THE FEATURE: *Editable Paragraphs*

ADVANTAGES:

• Improved responsiveness at the first point of contact whilst maintaining control

DESCRIPTION:

In many organisations the vast majority of feedback is resolved at the first point of contact without a written communication to summarise the issue. Editable paragraphs let you add a personal touch and it enables control over the communication at the first point of contact: only the selected paragraphs can be edited by the user.

Devolve power to where it is most effective without losing control from the centre.

Editable Paragraphs
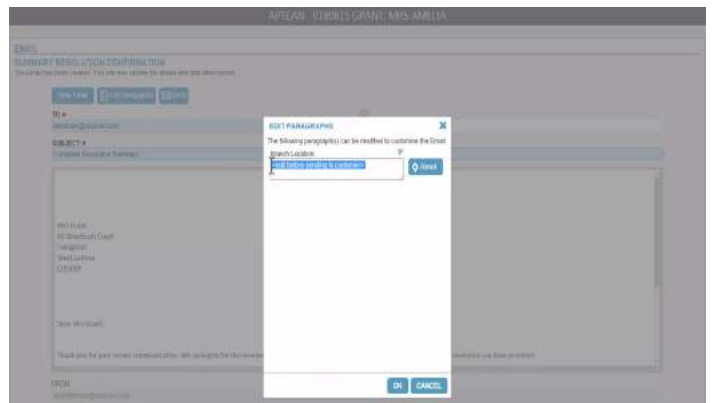
TECHNICAL MODERNITY

THE FEATURE: *Enhanced Migration Tool*

ADVANTAGES:

- Removes the cost prohibitive barrier to transform from version 3 to 6.0.1
- Reduces project duration to a handful of days

DESCRIPTION:

Unless you had a compelling reason to move to version 5, such as technology refresh, then the project to transform could have been cost prohibitive. The migration tool previously didn't cater for some key features in version 3, namely Status Manager. It now does.

It is feasible to migrate an existing version 3 configuration, with Status Manager, Advanced Object Handling, Templates, Runner Service, and reproduce it in version 6.0.1 with the comparable features configured and no business rules will be lost. The only items left to consider are some very specific searches and reports (the vast majority of searches and reports will migrate) before you have a fully functioning version 6.0.1 Respond solution.

The enhanced migration tool enables a migration from your version 3 system to a usable Respond 6.0.1 solution with minimal effort, giving you the time to consider how best to implement its broader feature capability to transform your complaints and feedback operating model.

THE FEATURE: *Technology Stack Update*

ADVANTAGES:

- Reduced cost of ownership

DESCRIPTION:

Respond version 6 has been re-platformed, which is to say Respond's structure remains the same but the supporting technology has been updated. Respond is now centrally controlled and managed; it negates the need for your IT team to visit each and every computer that is going to use Respond to install software, which could be a gargantuan task in some organisations, particularly those that use hot desking and remote working.

Respond uses a 3 tier architecture which separates the user application from the database - decoupling in this way makes Respond easier to maintain and upgrade.

THE FEATURE: *Open API*

ADVANTAGES:

- Reduced cost of ownership
- Flexible integration options
- Improved data consistency
- Reduced man days effort

DESCRIPTION:

How often have you wished that users did not need to rekey

information into Respond that your organisation already knows about the customer? More times than you care to remember? In the past, the use of both Aptean resources and those resources in your organisation made the integration a cost prohibitive exercise, but Respond's Open Application Programmable Interface is a game changer.

Aptean's philosophy of empowering its customers to be in control extends from configuration right through to its API. An Open API enables your technical community to create integrations between Respond and other enterprise systems to share information, either push or pull. Aptean's experienced professional services staff are on standby to support your teams if you need them but you are not locked in: you are free to use the most cost effective resource to perform your integrations.

THE FEATURE: *An Extensible Platform*

ADVANTAGES:

- Ready for the world that is as yet unknown

DESCRIPTION:

The Open API feature is great for communicating between Respond and back office systems, but what if you want a capability that isn't yet available, such as SMS, quality checks, relating cases? Aptean's EMF solution is ready to plug into Respond and provide them.

- SMS – provides the ability to receive and send text messages to create and update cases as well as informing complainants of the progress of their case.

- Quality check – provides a mechanism to select cases, using a broad range of criteria, for a quality check either during case processing or after it.

- Related cases – provides the ability for cases to be matched to the current case being handled using a broad range of criteria, for example similar words used within the case description.

These are examples of how EMF can be applied: they improve the customers' experience, save time and increase the quality

of work but they are only examples, so feel free to take your requirements to your Account Manager to see how they can be turned into a reality.

THE FEATURE: *Software as a Service*

ADVANTAGES:

- Reduced total cost of ownership

DESCRIPTION:

A prime advantage of SaaS is cost effectiveness and low total cost of ownership. Leveraging cloud infrastructure allows you to quickly scale the solution without the corresponding fully-burdened internal IT costs. SaaS in particular offers more unique cost advantages. Lower start-up costs, a pay-as-you-go subscription model, lower capital investment and instant scalability make Respond SaaS an appealing option for many customers.

If you wish to move to Respond version 6 without the need to launch a full IT project with infrastructure builds, ongoing operational management and updates of infrastructure, Respond SaaS could be your answer.

CONCLUSION

There is a maxim that states that the whole is greater than the sum of its parts and this has never been truer than for the latest version of Respond. Each capability provides an advantage with the cumulative effect delivering a series of efficiencies, productivity, and control and oversight gains that will assist in the transformation of your complaints and feedback operation.

Respond version 6.0.1 is a step change in complaints and feedback management, and your move to Respond version 6.0.1 will provide your organisation with the platform to take advantage of new capabilities that are already under development and those that are just a concept today with ease.

We started this paper with a quotation from Alexander Graham Bell and to heed his words, let your mind cooperate with your Account Manager's to plan your next steps.

About Aptean: Aptean helps businesses profit, innovate and grow where the work gets done—in the call center, on the floor of the factory, at the end of the assembly line. That's where Aptean's CRM, Complaints Management, ERP and Supply Chain software applications enable nearly 5,000 customers to satisfy their customers, operate more efficiently and stay at the forefront of their industry.

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