

Ohio Data Transfer

THINKING OUTSIDE THE BOX IN CUSTOMER SERVICE

Case Study of JBA Software Application

National Distributor Uses ODT VISION VRU With JBA System to Improve Customer Service

Animal Healthcare requires Unique customer service

Last year we did a project for a national distributor of health-care supplies to veterinarians. The goal of this firm is to make obtaining supplies simple and efficient for their unique customers. This client is on an iSeries/AS400 using JBA software. They have regional distribution/marketing centers and want to provide the best possible customer service to a cliental which may be mobile and may be working around the clock.

Customer Service Requires 24/7 Response

This client is always looking for ways to improve Customer Service. Four years ago, they began the process of taking their Customer Service to a 24/7 basis with the introduction of their Web based applications. Since their clients work 7 days a week and may need support at various times during the day or night, the number one goal is,

"To be the easiest firm in the world to work with, whether this is through the web, live customer service representatives or the ODT VISION VRU." By the caller using the ODT VISION solution, these veterinarians can be in constant contact to their account information. If mobile, a cellular phone becomes their I.O of choice.

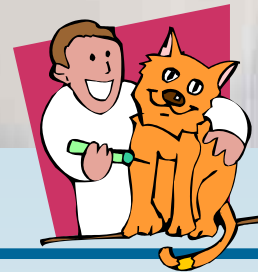
What is the ODT VISION Voice Response Unit?

ODT VISION® for the i5/ iSERIES/AS400 is a revolutionary product that allows two-way telephony to your IBM ISERIES/ AS400 and Micro Database. With the ODT VISION®, every touch-tone phone in the world becomes a remote secure terminal to your data. Through the ODT VISION VRU, the client has another way to communicate with their supplier. This is especially important outside of administrative office hours M-F 8:00 AM. to 5:00 PM.

In phase 1, the primary goal is to match the services which are now available during normal office hours on both the web and the live customer service representatives. In addition, this firm wanted to optimize existing customer support personnel.

CASE STUDY JBA:

Contact Ohio Data Transfer
614-985-3814
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Benefits of ODT VISION VRU

- Can interact with JBA Client's Customer Service to do a variety of functions
- Available on 24/7 bases
- No training of user
- Any touchtone phone is a terminal to interact with your account
- Internet access is not required
- Security of your account is maintained with sign-on procedure
- Allows JBA Client to improve customer service while optimizing existing personnel to lower administrative cost and therefore offering their products and services at efficient pricing
- If the caller is not an existing customer, their information is collected and forwarded to the proper marketing department so a sales representative can call on them. In addition a credit application is automatically faxed.

Phase 1 of Voice Solution

The ODT VISION VRU has been customized around the JBA Intl. IBM i5/iSeries/AS400 host's ERP application. In this first phase, the users will be able to:

- Sign-on to their account once security protocols are met
- Verify which account is selected
- Inquire on account balances and account details
- Request the fax of an invoice or a Statement on demand
- Request the change of profile form to be faxed on demand
- Make payments on their account
- Transfer to live customer service representatives during office hours or leave voice-mail outside office hours

All transactions which occur during the call will be logged for audit trail purposes. In addition, the JBA history note function will also be maintained.

Sign-on Procedure

At the beginning of the call, the caller will be asked to say their name and phone number as a security procedure and for use if a call-back is needed. This voice file is saved and entered into the log. The user will then be requested to enter an account number. The VRU at this point looks to see if there are multiple locations under this number. If there are multiple clinics, the unit will request you to identify which location is desired for the session. The caller will need the account number and zip code for account. At this point, the user will hear their account name and address which they must verify. If

the account is suspended, stopped or has an unacceptable overdue balance, the caller will be transferred to a live customer service representative during office hours so CS can better assist them.

Account Inquiry

From the general menu, the caller can choose an option to hear the current balance and discounted balance. The user can also request a complete breakdown from the various outstanding balance periods if such outstanding balances exist.



Print Invoice

The user may request to receive an invoice copy by fax once they supply the invoice number. For security purposes, the ODT VISION verifies that this invoice number is tied to this account and the caller must supply the fax number if not listed in their profile. The caller may also redirect the invoice to a different fax number.

Print Statement

They may also request a fax copy of their account statement. The most recent statement is suggested first, as this is most likely the statement desired, but the caller can request previous statements by month and year. Once again, the profiles fax number is suggested but the user can override this number.

Change Account Number

The caller may be running multiple accounts with various account numbers, so, from the general menu, they may choose an option to change the account number they are working with during this session.

Make a Payment

Choosing an option at the main menu, the customer may make a payment on their account with a credit card. The caller can pay the current balance or enter an amount manually. If the latter is chosen, it is applied to the oldest balance. The caller may use a credit card on file, and if they do, the payment transaction is processed immediately and confirmation is given along with a confirmation number once approved by the bank connection. If the caller chooses to use a credit card that is not on file, or if the bank link is down, the transaction is batched and handled later. Customers may call into the VRU system anytime to verify their account balance.

Transfer to a Live Customer Service Representative

At any prompt, the customer may choose to be transferred to a live customer service representative who can assist the caller with their customer service needs. If after office hours, the unit instructs the caller to leave a voice mail so that a customer service representative can call back during the next business day.

Future Applications

These are only the first of many applications which can be provided from the ODT VISION VRU. ■