Interaction Process Automation "IPA"
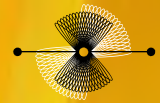
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Interactive Intelligence

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Queuing Concepts & Economies of Scale are recognised contact center Activities!

With IPA we have taken the concepts we have perfected from the contact center and are extending them to the rest of the organisation. These concepts include:
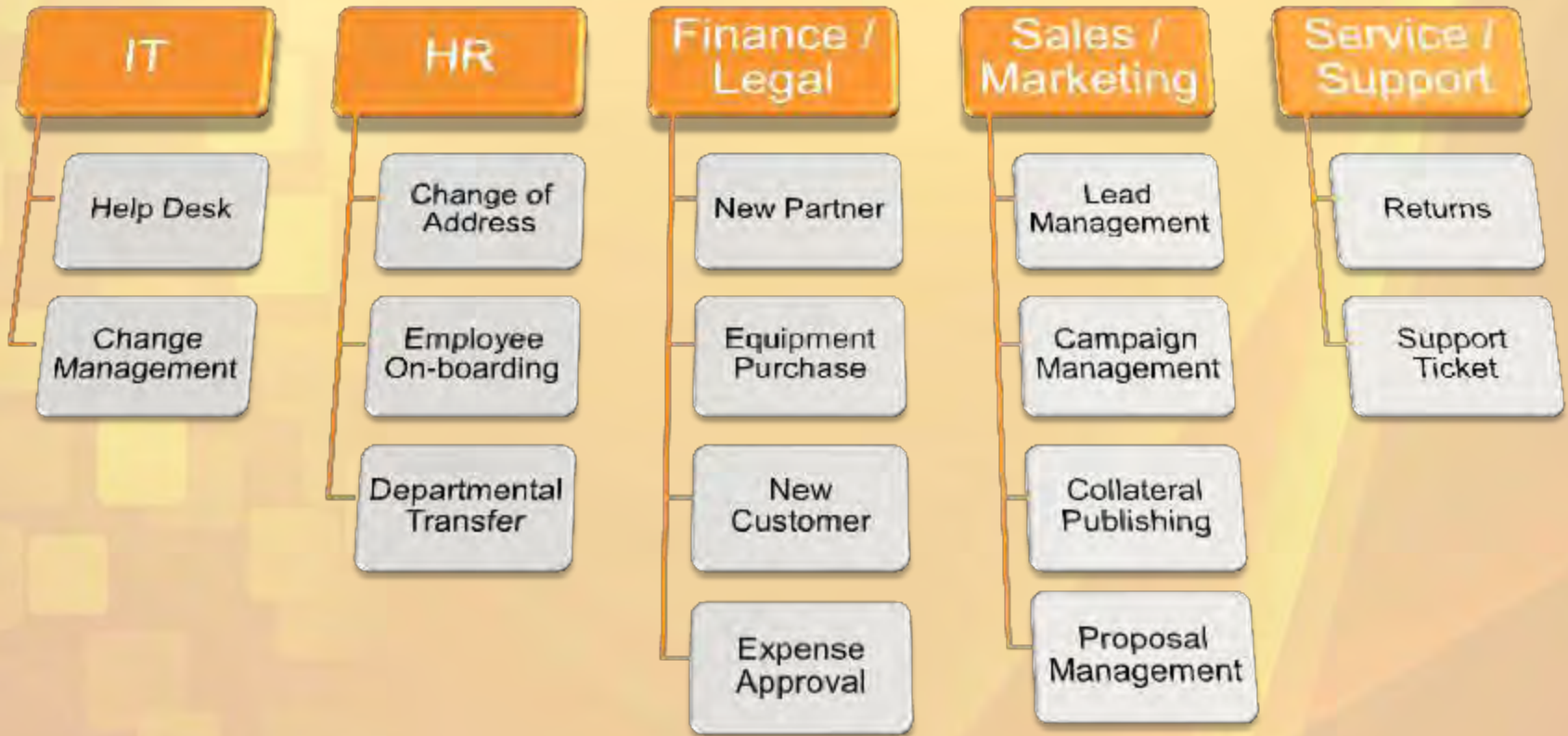
- First In, First Out
- Skill Based Routing
- Time and Motion (Average Handle Time)
- Service Level Delivery
- Resource Forecasting / Scheduling
- Real-Time Monitoring / Historical Reporting
- Eliminate 'Paper-itis'
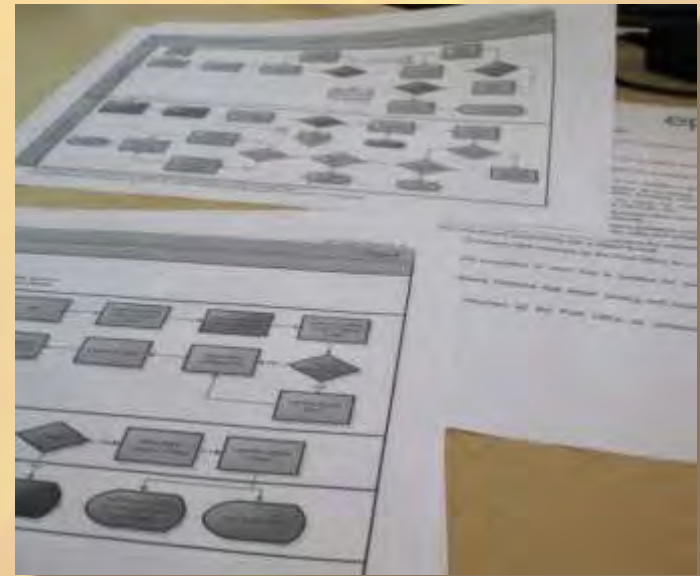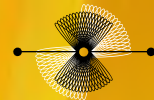
"Horizontal" Processes

There are many examples of business processes that could occur in any organisation, regardless of industry:

IT	HR	Finance / Legal	Sales / Marketing	Service / Support
Help Desk	Change of Address	New Partner	Lead Management	Returns
Change Management	Employee On-boarding	Equipment Purchase	Campaign Management	Support Ticket
	Departmental Transfer	New Customer	Collateral Publishing	
		Expense Approval	Proposal Management	
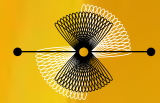
"Vertical" Processes

There are also examples of business processes that are specific to a particular industry:

Insurance	Healthcare	Financial Services	Government
Participant Enrollment	Patient Access	Loan Origination	Claims processing (welfare, social services)
Claims Processing	Revenue Cycle	Credit Fulfillment	Citizen Interactions
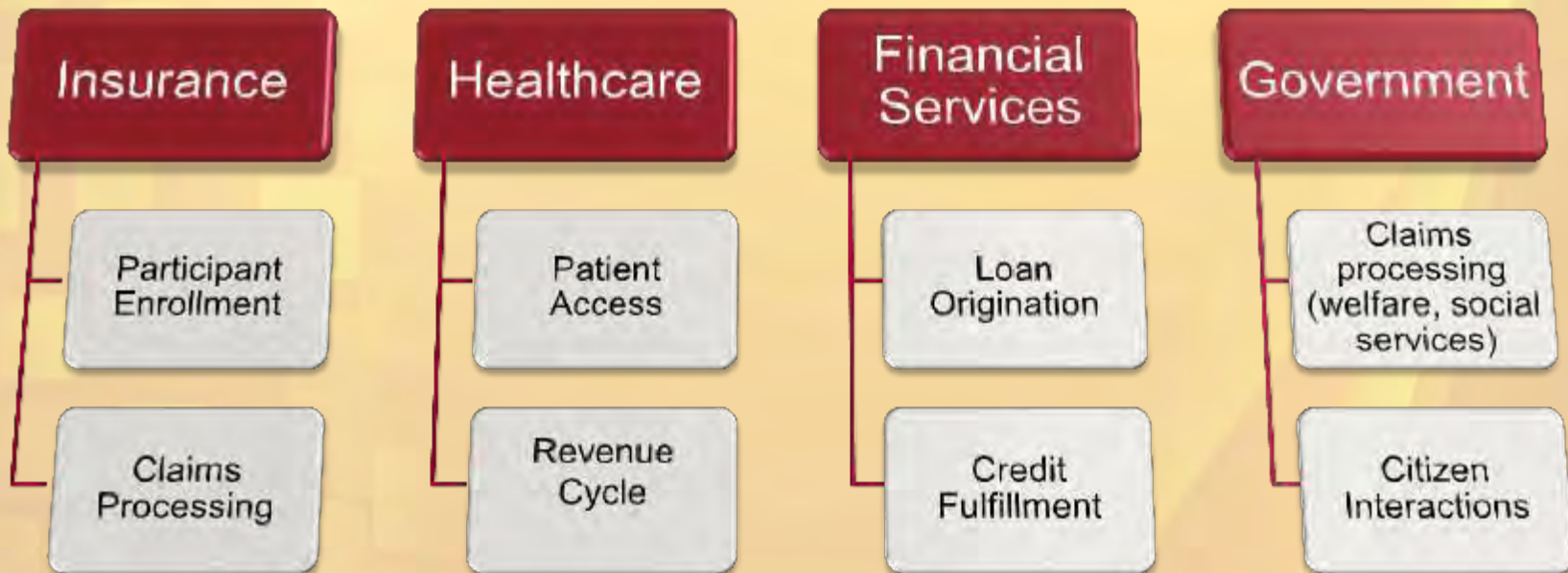
The common factor of the processes we are focused on is the fact that they are *multiple-step*, *people-centric* processes.

How IPA Delivers Measurable Return on Investment (ROI)

Minimizes

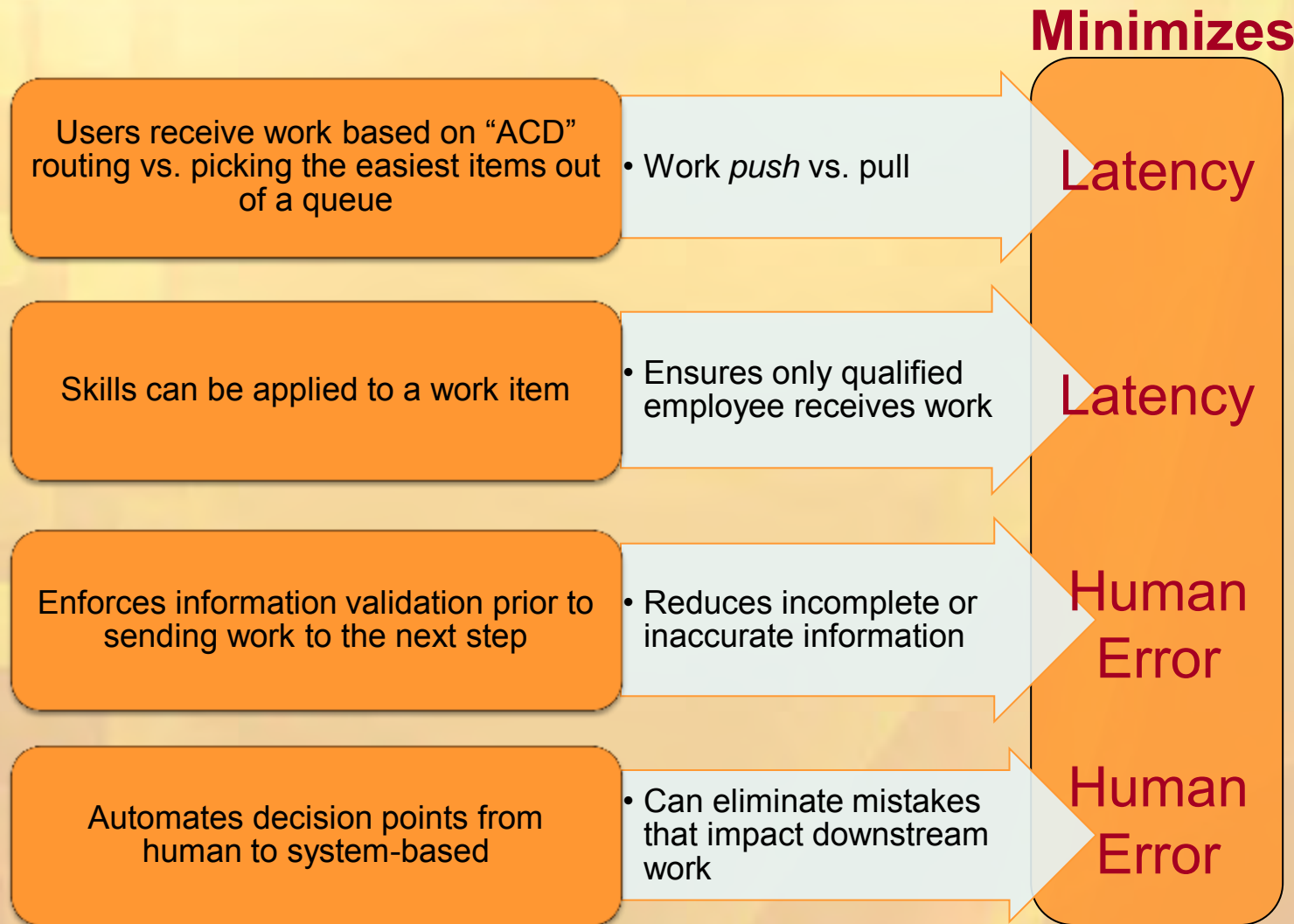| Feature	Benefit	Minimizes
Users receive work based on "ACD" routing vs. picking the easiest items out of a queue	• Work *push* vs. pull	Latency
Skills can be applied to a work item	• Ensures only qualified employee receives work	Latency
Enforces information validation prior to sending work to the next step	• Reduces incomplete or inaccurate information	Human Error
Automates decision points from human to system-based	• Can eliminate mistakes that impact downstream work	Human Error

Call Centre Management Information

Real Time Statistics and Historical Reporting

- How many work items are pending? Who has a work item now?
- How long on average do work items take?
- How many work items have been handled by the team?
- Associate interactions with the process they support

Improve Process Efficiency

- Find bottlenecks in the process and eliminate them
- Reduce overall cycle time
- Improve overall throughput

Futures

- Optionally record activity, including just work, or all desktop activity while work is underway
- Schedule work activity more efficiently, and to predict upcoming staffing needs

What does it look like ?
Some examples……

1. How you build processes ….?

2. What do call centre agents see / use ?

3. Show me what information or reports you have ?

Interaction Client: .NET Edition

File   Edit   View   Options   Processes   Help
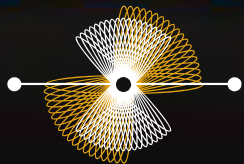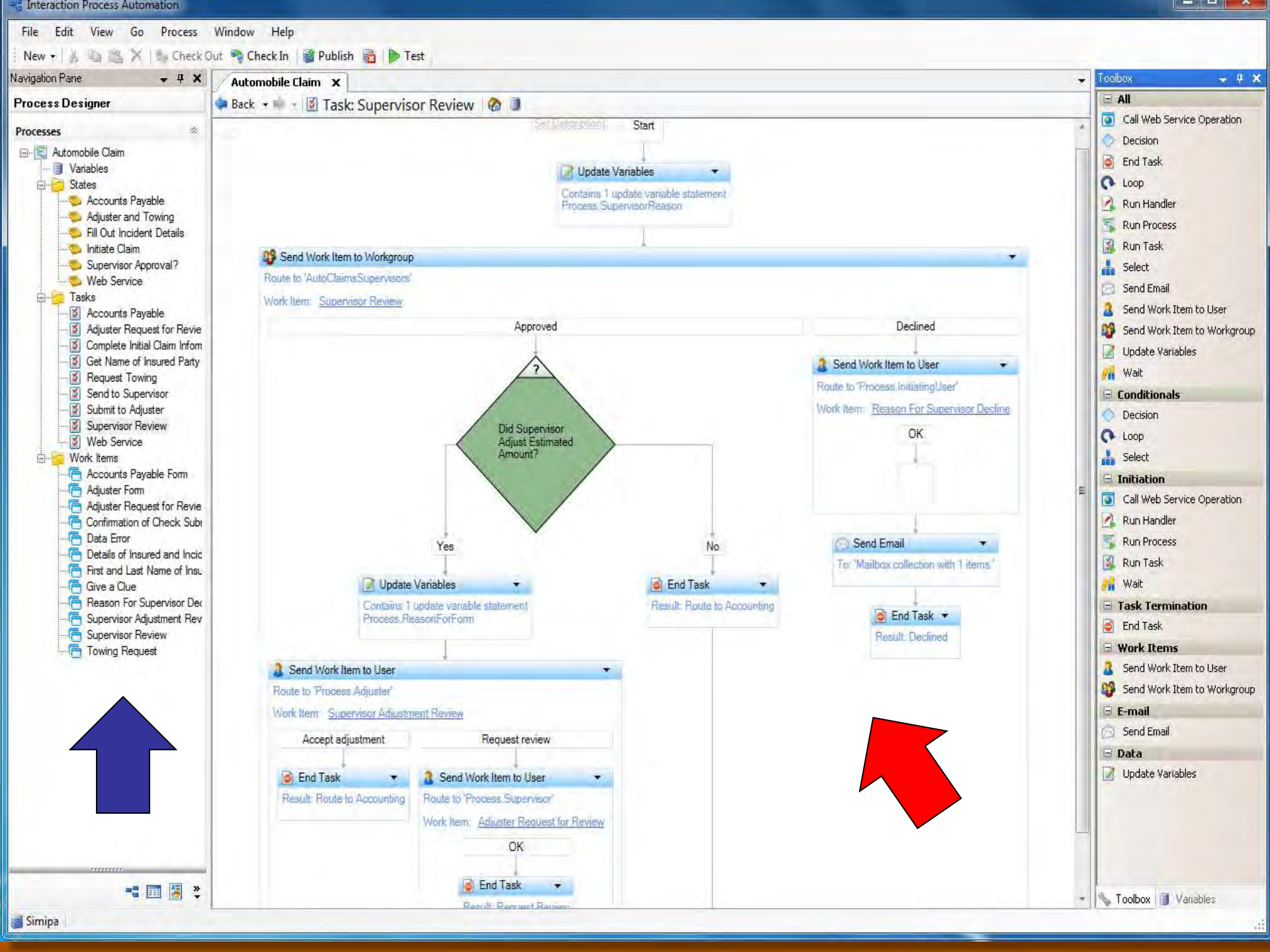
Number _____ ▼   Make Call ▼

My Interactions | My Work Items | Call History

Queue	Name	Call Id	Number	Duration	State	User	Station	Line
📞	To Jason Carter	2001105882	(317) 123-4327	0:00:29	Connected	Jason Carter	317 484327	Sim

Pickup   Hold   Mute   Tran...

My Status 🖥 Available

Company Directory

Launch Process

Name	Description
Automobile Claim	First Report of Loss in a Collision
Demo Request	First attempt at a process for requesting a Tech Sales demo res
Health Insurance Enrollment	The process an insurance company might take when enrolling
HR OnBoard Preperation	Process to make sure all system are ready for any new employe
Insurance Update	Update existing Insurance Policy
New Auto Insurance	Start a new Auto Insurance policy
New Life Insurance	New Life Policy
Order Fulfillment	Process to launch for order fulfillment.

Launch   Close

Status Summary	Last Name					Until	C
🧑❌	Zerbe						
👤❌	Wargel						
🧑❌	User2						
🧑❌	User1	Sim	8001		🧑 Available		
👤❌	Stewart	Don	8653	Technical Sales	👤 Available, No...		
❌👤❌	Stauffer	Veronica	8125		❌👤 Invalid Status		
👤❌	Shappell	Bob	8616	Technical Sales	👤 Available, No...		
👤❌	Rincker	Miles	8702		👤 Available, No...		
	Phillips	Andy	8515	Technical Sales	Available		

Dial   Business   Mobile   Business   Camp   Chat   Transfer   Properties

🔒 Simipa   3177484827

Interaction Client: .NET Edition

File   Edit   View   Options   Processes   Help

Number [   ] ▼   Make Call ▼

My Interactions | ➜ My Work Items | Call History

My Work Items (All)	Queue	Category	Description
Initiate Claim Process		Initiate Claim Process	Carter
Items Returned from Data...		Items Returned from Data...	Jason, Carter, Incident Claim Number: 10554

⏳ Pickup   ⌛ Hold   ⓘ Process Details

My Status 🔋 Available ▼   21:24:29 Set status details   👤

Company Directory

[   ] [   ] [   ] [   ] [   ]

Status Summary	Last Name ▼	First Name	Extension	Department	Status	Status Notes	Until
👥✖	Zerbe	Todd	8248		🔋 Available		
👤✖	Wargel	Beth	8650		👤 Available, No...		
👥✖	User2	Sim	8002		🔋 Available		
👥✖	User1	Sim	8001		🔋 Available		
👤✖	Stewart	Don	8653	Technical Sales	👤 Available, No...		
❌✖	Stauffer	Veronica	8125		❌ Invalid Status		

👐 Dial   👐 Business   📱 Mobile   📇 Business   📇 Camp   💬 Chat   ➡ Transfer   ⓘ Properties

🔒 Simipa   3177484827   📖

Interaction Process Automation

File   Edit   View   Go   Help

Navigation Pane

Process Monitor

Process List

- Processes (7)
  - **Automobile Claim (3)**
  - Demo Request (0)
  - Health Insurance Enrollment (0)
  - HR OnBoard Preperation (0)
  - **Insurance Update (1)**
  - **New Auto Insurance (1)**
  - New Life Insurance (0)
  - **Order Fulfillment (2)**
  - Rick Test Process (0)
  - Sample Insurance (0)
  - WRM Employee OnBoarding (0)

All Processes

	Launch Mode	Process ID	Initiator	Current State	Status	Version	Process Name	Start Time	Details
✓	Regular	10560	Jason Carter	N / A	Complet...	v1	New Auto Insura...	02/09/2010 02:03 PM	None sp
✓	Regular	10561	Jason Carter	N / A	Complet...	v1	Insurance Update	02/09/2010 02:03 PM	None sp
●	Regular	10555	Jason Carter	Supervisor Approval?	Running	v30	Automobile Claim	02/09/2010 11:37 AM	Incident
●	Regular	10556	Jason Carter	Initiate Claim	Running	v30	Automobile Claim	02/09/2010 02:02 PM	None sp
●	Regular	10557	Jason Carter	Initiate Claim	Running	v30	Automobile Claim	02/09/2010 02:02 PM	None sp
●	Regular	10558	Jason Carter	Order Entry State	Running	v3	Order Fulfillment	02/09/2010 02:02 PM	None sp
●	Regular	10559	Jason Carter	Order Entry State	Running	v3	Order Fulfillment	02/09/2010 02:02 PM	None sp

Simipa

Work Items

Automobile Claim

					Total duration:	2:02:33:42	Total Work Time:	1:00:09:04
	Description	Process	Started	Ended	Duration		Picked Up	Work time

Adjustors

Adjuster Form				Totals: 1	00:00:00		00:00:10
Avg. Work Time: 00:00:10	Avg. Total Time: 0						
	Sent to Adjusters in the state of, MI, Insured Customer Last Name: Shappell, Incident Claim Number: 10379	10379	1/7/2010 3:38:38 PM	1/7/2010 3:38:39 PM	00:00:00		00:00:10

Andy.Phillips

First and Last Name of Insured				Totals: 1	2:02:32:11		1:00:02:05
Avg. Work Time: 1:00:02:05	Avg. Total Time: 2:02:32:11						
	None specified	10378	1/6/2010 10:53:57 AM	1/8/2010 1:26:09 PM	2:02:32:11	1/6/2010 10:53:58 AM	1:00:02:05

Bob.Shappell

Adjuster Form				Totals: 2	00:-05:-35		00:00:10
Avg. Work Time: 00:00:10	Avg. Total Time: 0						
	Sent to Adjusters in the state of, MI, Insured Customer Last Name: Shappell, Incident Claim Number: 10379	10379	1/7/2010 3:38:39 PM	1/7/2010 3:38:53 PM	00:00:14		00:00:00
	Sent to Adjusters in the state of, MI, Insured Customer Last Name: Shappell, Incident Claim Number: 10379	10379	1/7/2010 3:44:43 PM	1/7/2010 3:38:53 PM	00:-05:-49	1/7/2010 3:44:46 PM	00:00:10

Details of Insured and Incident				Totals: 1	00:01:04		00:01:02
Avg. Work Time: 00:01:02	Avg. Total Time: 00:01:05						
	Suzanne, Shappell, Incident Claim Number: 10379	10379	1/7/2010 3:37:33 PM	1/7/2010 3:38:38 PM	00:01:04	1/7/2010 3:37:35 PM	00:01:02

Questions

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