**Global Success Correspondence: Korea Requirements**

**Objective:**

*Provide automatic communication to Learners in the form of progress encouragement and reminders.*

**Assumptions:**

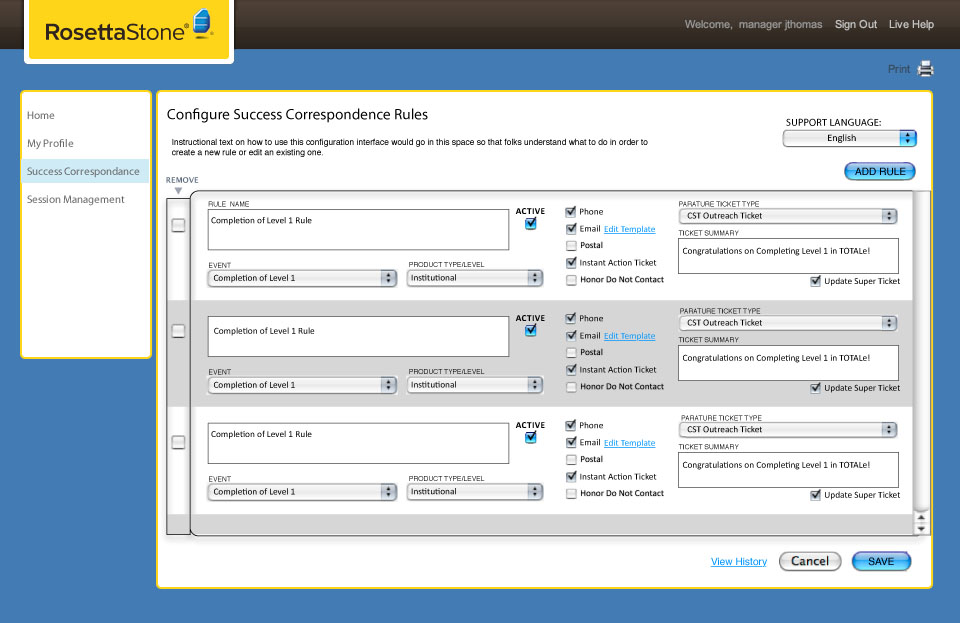
* *Success Correspondence is an international tool, so functionality will be globalized wherever possible.*

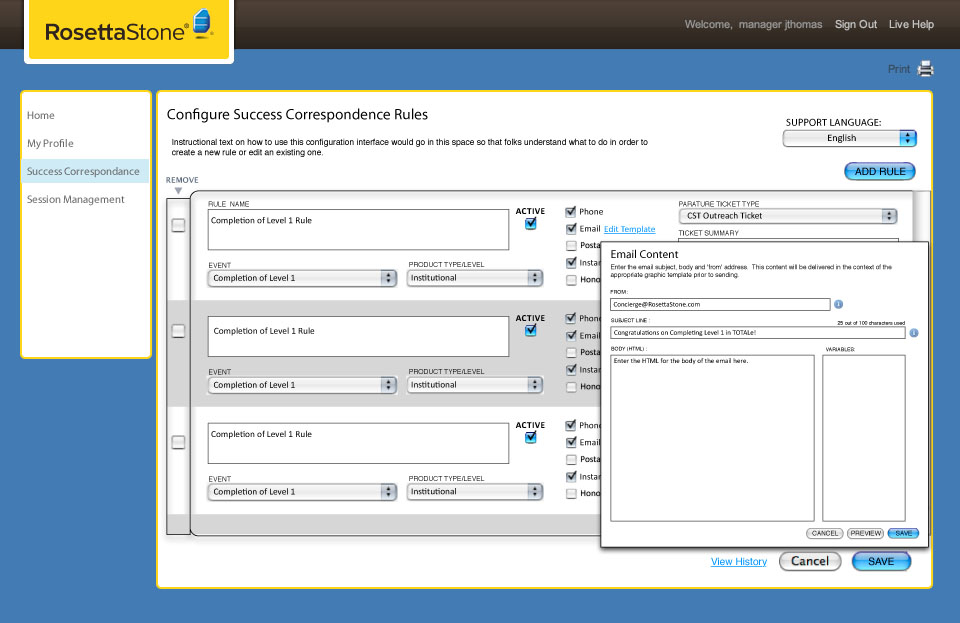
| **Revision History** | | | | |
| --- | --- | --- | --- | --- |
| **Version** | **Requirement** | **Description of Change** | **Author** | **Date** |
| 1.0 | Initial Draft | Initial Draft | Djerame Dasco | 1/27/2011 |
| 1.1 | Draft Revision | Draft Revision based off of Global requirements meeting: 2/1  Added additional requirements from Lorna (not discussed) | Djerame Dasco | 2/10/2011 |
| 1.2 | Revision | Closed Open Items # 1 & 2 | Djerame Dasco | 2/14/2011 |
| 1.3 | Revision | Revision based off of Global requirements meeting: 3/3 | Djerame Dasco | 3/3/2011 |
| 1.4 | Revision | Added LOES based off of Technical review | Djerame Dasco | 3/16/2011 |
| 1.5 | Revision | Added Rank column so business can prioritize requirements | Djerame Dasco | 3/17/2011 |
| 1.6 | Revision | Added Mock up of UI to the Appendix | Djerame Dasco | 3/21/2011 |
| 1.7 | Revision | Rankings finalized based off of Global meeting: 3/24 | Djerame Dasco | 3/24/2011 |
| 1.8 | Revision | Updated Discovery Call Trigger  Removed requirements that were out of scope.  Rearranged requirements by Rank. | Djerame Dasco | 4/05/2011 |
| 1.9 | Revision | Included feedback from the team | Djerame Dasco | 4/06/2011 |

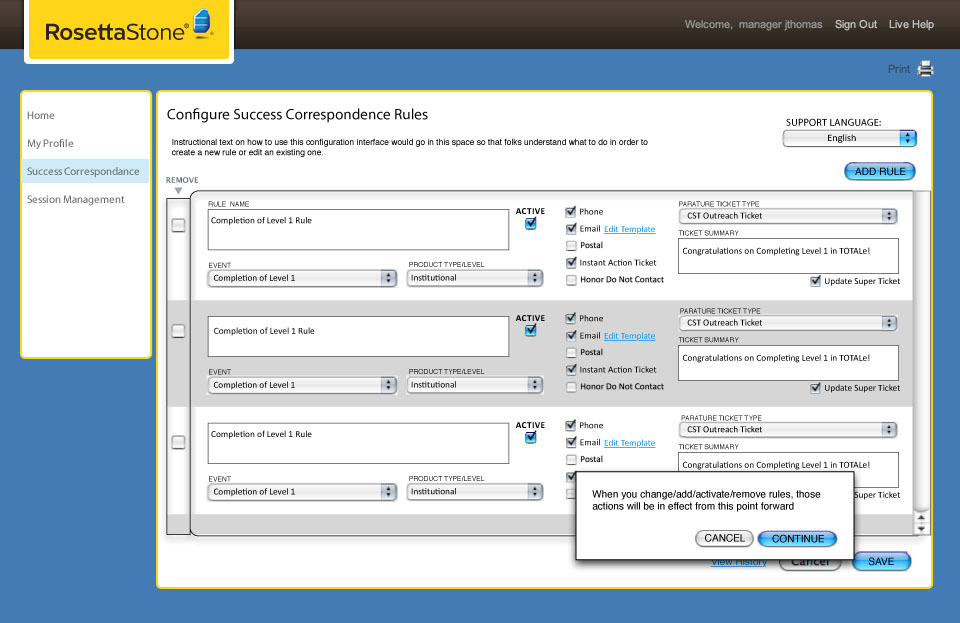
| **Requirements** | | | | | | | |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Req #** | **Functional Area** | **Description** | **Originating Business Unit** | **Priority** | **Impacted System(s)** | **Business Owner(s)** | **Comments** |
| 1.01 | Global | Extend Succor functionality to the Korean Support Language and Korean Parature dept. |  | H |  |  |  |
| 1.02 | SUCCOR | Create an interface so that business users are able to change content, method of contact or ignore trigger for success correspondence. | Customer Success | H | All | Nilofer | (See Appendix)  Admin tool/interface to control method of contact (email, postal report, phone ticket) and the contents of the contact (email templates). |
| 1.03 | SUCCOR | Change all of the English email templates for our new re-branding of Concierge Services and from address to [conciergeservices@rosettastone.com](mailto:conciergeservices@rosettastone.com) | Customer Success | H | Success Correspondence | Lorna Selley | Customer Success (US) is being re-branded to Concierge Services. |
| 1.04 | SUCCOR | Remove the requirement for a learner to be in the BAW as it causes a lag and messages not to be sent.  Also, this will allow pilot/beta/TSUB/etc learners to be included in Success Correspondence. | Customer Success | H | Success Correspondence | Lorna Selley | We are seeing many learners being left out of Success Correspondence (including a one day lag when people activate/claim within 24 hours) and pilot/beta/inst customers. This is a major issue and we’d rather have everyone included and make exceptions if necessary rather than risk so many people being left out. Important for all teams. |
| 1.05 | Trigger | We need to have triggers for when a coach marks that a learner needs a follow up for a poor experience, breaking immersion, or being unprepared. | Customer Success | H | Product, success Correspondence | Sydney Yazdani | Allows us to reach out through phone preferably (if they have phone #s) when Coaches mark in their feedback options that a learner was breaking immersion, unprepared, or had a poor experience due to technical issues/other learners. Very important for all teams to ensure learners are back on track and happy after Studios. |
| 1.06 | Trigger | We also need to have a trigger for when a learner marks “no” that they didn’t enjoy the session in the survey after their session. | Customer Success | H | Product, success correspondence | Sydney Yazdani | Allows us to reach out to all learners who mark that they did not enjoy their Studio session in the post-session survey question. Preferably a phone ticket if they have a phone number. |
| 1.07 | Studio Triggers | Change triggers from being based on locale to being based on support language.  If support language does not equal a relevant template the default communication will be set to English. | Customer Success | H | Product, Parature, Success Correspondence | Lorna, Nilofer | Product will be sending the learner’s “support language” in addition to locale. We will need to change email templates to reflect “support language” instead of “locale”. |
| 1.08 | Trigger | Add “Not logged in for 10 days” Trigger | Customer Success | M | Parature,  Success Correspondence | Sydney Yazdani, Paul Kim | For Log Back encouragement triggers – Internal details should include the elapsed time For Ready for 1st studio session trigger – Internal details should show Level and Unit |
| 1.09 | Trigger | Fix error where learner receives Studio encouragement for levels without online rights. | Customer Success | L | Success Correspondence | Lorna | Owning separate products - when a learner has a V3 and another V4 product and they are receiving notifications that they are ready for Studio for the levels they have in V3, which isn’t possible.  We’ve just had a few learners call in who received these outreaches to sign up for Studio when they didn’t have access to it because it was for their V3 product. |
| 1.10 | Trigger | Discovery Call: Send trigger at initial purchase of product with the ability to define X days since purchase.  -i.e. Send trigger 3 days after purchase | Customer Success | H |  | Paul Kim, Hannah | This trigger will only be for learners who purchase the product via DTC. |
| 1.11 | Studio Triggers | Add the ability to send communication to a mobile phone. | Customer Success | H |  | Hannah / Nilofer | JP: Text messages will be sent to a “phone email address” as oppose to a phone number. |
| 1.12 | Trigger | Add trigger “Session Reminder 6 Hours” | Customer Success | M | Success correspondence | Sydney Yazdani |  |
| 1.13 | Product | Increase the frequency of phone ticket creation | Customer Success | L | Product, Parature | Lorna | For “Not Logged in” trigger, increase frequency from once every 24 hrs to every 6 hrs. |
| 1.14 | Trigger | Send trigger x days before the end of a Learner’s subscription period.  -X days will be configurable by the user via the UI | Customer Success | H |  | Lorna |  |
| 1.15 | Studio Trigger | Provide an on-screen confirmation in Product so that the learner knows he has been successful in booking a studio session. | Studio Coaches | M | Product | Vera Miller |  |
| 1.16 | SUCCOR | Postal Reports will be posted to an internal FTP site.   * Postal Reports will have the language appended to the file name | Customer Success | H |  | Hannah |  |
| 1.17 | Studio Triggers | In the comments section of the Parature super ticket, the contents of the email will be replaced with just the subject of the email. | Customer success | M | Parature | Hannah |  |

| **Open Items** | | | | |
| --- | --- | --- | --- | --- |
| **#** | **Description** | **Owner** | **Status** | **Comments** |
| **1** | Gather more background for the need of this link with Alicia. Would want to avoid being redundant in asking for Learner feedback. | Alicia Knight | **CLOSED** | Alicia: Does not have access to the feedback given by the learner through the product. Their goal is to put positive feedback of the product on the website.  Randy & Willson: It's a 1 yes/no question, something like "Did you enjoy your Studio session?” There isn’t a free text field to fill out comments. |
| **2** | Discuss best practices for email security with Seth Roach | Seth Roach | **CLOSED** | Seth: Sending sensitive data via email is not best pratice. If it is going from and to RS users that is better, but I would suggest using a user restricted location on the fileserver for internal users.   If you require external access then I would put in a quickbase ticket for a FTP site.  Let me know if you have any questions about file server access for FTP setup. |
| **3** | What are all the segmentation points? Are all potential segmentation points available? | Nilofer, Lorna, Hanna, Alex Long, Paul Kim | **CLOSED** | Segmentation Points: Language, Motivation, Level, Age, Gender, End Goal Date, Vertical, and Tenure. |
| **4** | Does there need to be any localization of Success Correspondence for UK Metternich launch? If so, what? | Alex Long | **CLOSED** | Presently, UK will be successing Learners from the English Parature Department (Rosetta Stone Success). Triggers have been reviewed by the UK Office and have been deemed satisfactory. |
| **5** | Does there need to be any localization of Success Correspondence for Korea Metternich & Lotus launch? If so, what? | Paul Kim | **CLOSED** | Email Messages will need to be localized. |
| **6** | Need to investigate the technical requirements for sending text to mobile phones in the different regions. | Rich Monte,  Dmitry Grits | **CLOSED** | Rosetta Stone has a standing relationship with two vendors for SMS. |
| **7** | Need clarification on which user info to use since BAW has several email addresses at time of purchase. | Randy Budnikas | **CLOSED** | Ship to Email Address |
| **8** | Will contact method from the community profile be synced with Parature learner profile? If so, will success correspondence use it for any trigger logic | Nilofer Saidi, Randy Budnikas, Lorna Selley | **Open** |  |

**Appendix:**

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