# Scoping Document Phase One

This document is intended to ensure a delightful customer experience and a clean handover from sales to implementation.

Please ensure that all relevant information is reflected here, even if not specifically requested, in the default format.

| **Customer Name:** | MintMobile |
| --- | --- |
| **Opportunity Name:** | MintMobile - AMP - Ibex |
| **Opportunity Link in SFDC:** | https://parloagmbh.lightning.force.com/lightning/r/Opportunity/006aa000008voTKAAY/view |

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## 

# **Account Executive**

## Parloa Team

| M. | Account Executive | Trey Owings / Pavel Sardar |
| --- | --- | --- |
| M. | Sales Engineer | Kevin Chang |
| O. | Solution Engineer | TBD | Expected Eduardo will need to support with Genesys integration |
| O. | Customer Success Manager | [Austen Lake](mailto:austen.lake@parloa.com) |
| O. | CX Designer | [Adam Schear](mailto:adam.schear@parloa.com) with support from [Jingmiao Feng](mailto:jingmiao@parloa.com) |

## Deployment Information

| M. | **Contact Center Solution?** | Genesys |
| --- | --- | --- |
| M. | Which Backend System(s) is/are in use **where customer data lives?** | NA |
|  |  |  |
| M. | Integration / Implementation Partner | Ibex |

## Deployment Contacts

| M. | Champion Name & Email | [pavel.sardar@ibex.co](mailto:pavel.sardar@ibex.co)  [sinnan.khan@ibex.co](mailto:sinnan.khan@ibex.co) [zeeshan.ahmed@ibex.co](mailto:zeeshan.ahmed@ibex.co)  wasiq.ashfaq@ibex.co |
| --- | --- | --- |
| O. | Client project manager | Pavel |
| O. | Admin contact for telephony | Sinnan Khan, Zeeshan Ahmed |
| O. | Admin contact for backend | Wasiq Ashfaq, Zeeshan Ahmed |
| O. | Admin contact for contact center | Wasiq Ashfaq, Zeeshan Ahmed |
| O. | Further Contacts |  |

## 

## Project Information

| M. | Preferred Go-Live | 6-8 weeks |
| --- | --- | --- |
| M. | Implementation start date | 12/13/2024 |
| M. | Which Languages are needed? | AMP only (English) |
| M. | Do we have implementation phases? **Timelines:** | This is Phase One (FAQ and Routing) |
| M. | What Channel do they want to use?   * Telephony | Voice/Telephony |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXD(not rated)   SolEngHigh (3) | CXDHigh (3)   SolEngHigh (3) | CXDMedium (2)   SolEngMedium (2) | * [timeline] timeline is very short for go-live   + Risk: missed deadlines * [capacity] challenging time of year due to holidays, vacation, etc. * [partner] unclear how much contact Parloa will have directly with the customer |
| Final: |  |  |  |  |

# 

# **Sales Engineer**

# Use Case Discovery

| Routing Skill | Yes |
| --- | --- |
| Knowledge Skill (Conv. FAQ) | Yes |
| Authentication Skill  (May not want this in the beginning) | No, phase two |
| E2E / Self-service - Custom Integration Skill | No, phase two |
| Custom Notes: Core use cases | No, phase two |

## 

## Use Case Details: Routing Skill **Step (1)**

| M. | How many routing destinations do you have?  & Will it be a multi or Single condition Routing? | Multi - see -> [Mint\_WaveIX Initial Implementation Flow chart[1].pdf](https://drive.google.com/open?id=1EtDpg_VlM0WnnK2bpQ5G64N3Ulyjdd1i) |
| --- | --- | --- |
| O. | Will Parloa replace an existing provider? | No |
| O. | Add any additional details/ conditions? | Not at this time. They are not tied to their IVR so far. They love the front-end with the Parloa experience. Don’t want a drop off from that to the IVR menu experience. |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXD(not rated)   SolEngMedium (2) | CXD(not rated)   SolEngMedium (2) | CXD(not rated)   SolEngMedium (2) | * [routing] unknown number of routing destinations * [routing] unknown client skill set/familiarity with routing inside of Genesys |
| Final: |  |  |  |  |

## Use Case Details: Knowledge Skill **Step (2)**

| M. | What FAQs/Knowledge should be included? | FAQ from Home Site |
| --- | --- | --- |
| M. | How many FAQs? How large is the content? | Large, 64 pages |
| M. | Can you provide the knowledge base content in a Parloa readable format (CSV, PDF, API connection - recommended is CSV)? | We have the pdf -> [Mint FAQ.pdf](https://drive.google.com/open?id=1TTtsEzUeKSsdWl3TsJ3BD4PxEk6W9wuF) |
| M. | Will it be Text-only Q&As (Question answer paring) | For Parloa, we will leverage text based Q&As. |
| M. | FAQ rich Content in PDF ( -> images, large tables, graphs fine print, legal documentation, and contracts don’t work well) | Yes |
| O. | Add any additional detail | No |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXDMedium (2)   SolEng(not rated) | CXDHigh (3)   SolEng(not rated) | CXDMedium (2)   SolEng(not rated) | * [format] FAQs will require extraction and formatting to be prepared and ready for Knowledge Skill ingestion and use |
| Final: |  |  |  |  |

# 

## Telephony

| M. | Do you want to connect to Parloa via SIP or via PSTN? | SIP  Genesys Cloud, owned by Mint. |
| --- | --- | --- |
| M. | PSTN: What is the method of sending data back from the bot to your telephony system (e.g. rolling number, over dial digits, CLIP no screening)? | NA |
| M. | SIP: Can your system establish a SIP connection over the internet (i.e. outside of the internal network - via your SBC for example)? | Yes - |
| M. | SIP: Can your telephony system use an FQDN (fully-qualified domain name) in the To: header of the SIP invite? | Yes |
| M. | SIP: Is there a way to refer calls back to your system (NOTE: Parloa cannot send outbound/outgoing INVITES), either via:   * SIP-INVITE * SIP-REFER * API | SIP-INVITE Can do both |
| O. | Is there any documentation/architectural chart for the telephony infrastructure you can share with Parloa? | Not needed |
| O. | Do you want to use TLS for call encryption? | Yes |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXD(not rated)   SolEngLow (1) | CXD(not rated)   SolEngMedium (2) | CXD(not rated)   SolEngMedium (2) | * [telephony] Genesys cloud CX is confirmed compatible with Parloa * [telephony] not confirmed that the customer can provide adequately skilled resources to manage the integration and routing on their side |
| Final: |  |  |  |  |

## 

## Forwarding & Handover

| M. | Will you have more than one Routing target in your CCAAS solution the call should be routed to? | Yes |
| --- | --- | --- |
| M. | Do you wish to send data from the dialogue to the agent? | Yes, pop up required that includes call context (i.e. handover information if the call is transferred back to a human) |
| M. | If so, what possibilities do your system offer?  Examples:   * Query database via rest * Display HTML * Read data from a SIP Header | Read data from a SIP Header Can support All |
| M. | Which agent desktop software is in use? (e.g. Salesforce, Novomind, Genesys, etc.)? | Salesforce |
| M. | If you want to get information, do you want to use Parloa’s Call Data Service?  If you are using the UUID Header to pass over data, does your CCAAS require you to encode the data or any other requirements ? | Yes |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXD(not rated)   SolEngMedium (2) | CXD(not rated)   SolEngHigh (3) | CXD(not rated)   SolEngMedium (2) | * [handover] unclear which mechanism they want to use, "can support all” but * [handover] as [Tomas Gear](mailto:tomas.gear@parloa.com)correctly pointed out, agent displays/popups should be confirmed as being within the client sphere of responsibility * [backend] unclear if SF integration will be required in Phase 1, not confirmed whether Parloa will play a role in the integration between Genesys and SF |
| Final: |  |  |  |  |

# 

## Backend

| M. | How are your backend systems hosted (e.g. on on-premise, private virtual Cloud, SaaS product)? | Cloud |
| --- | --- | --- |
| M. | Is your backend system accessible via REST API or SOAP? | Yes, REST |
| M. | Please list what the backend services we will need to integrate for all the use cases above | Genesys |
| O. | Do you require BYOK (Bring your own key)? | No |
| O. | Are there any specific security requirements, e.g. protocols or certifications that are required. For example, do they require the connection to be secured via a VPN or any other security measure? | NA |
| O. | Are there any specific security protocols or compliance requirements (e.g., GDPR, HIPAA) that need to be adhered to during the integration? | No |
| O. | Is there any documentation/architectural chart for the backend systems and interfaces/APIs you can share with Parloa? |  |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXD(not rated)   SolEngMedium (2) | CXD(not rated)   SolEngLow (1) | CXD(not rated)   SolEngHigh (3) | * [security] security requirements are potentially not clarified – has the possibility to derail the project * [backend] no information about APIs, authentication methods, etc.   + Has been a major issue in previous projects when this information was not available at an early stage |
| Final: |  |  |  |  |

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## Analytics (How does Ibex want to track analytics for MintMobile?)

| M. | Does the customer want to use our Analytics offering? | Yes |
| --- | --- | --- |
| M. | Should we host the analytics on our server (Cosmos DB) or does the customer want to host it themselves? | Parloa hosted, customer hosted is not currently supported in AMP |
| O. | Which Analytics tool is in use? | Standard Genesys |
| O. | What KPIs do they want to report? | Volume, containment and handoff |

## 

| \*\* | Risk Assessment (CX) | Likelihood (CX) | Impact (CX) | Description  Tags: backend, auth, file format, timeline |
| --- | --- | --- | --- | --- |
| Initial:  2024 Nov 13 | CXDHigh (3)   SolEngHigh (3) | CXDHigh (3)   SolEngHigh (3) | CXDHigh (3)   SolEngHigh (3) | * [evaluation] There is currently no standard setup for AMP analytics to track custom or customer-specified KPIs   + Built-in dashboard contains only consumption data * [tooling] Genesys also contains only consumption data (and potentially recordings *if the customer elects to record and remain in the call*) |
| Final: |  |  |  |  |

# 

# PARLOA TEAM

# Unknowns/risks for technical implementation

You want to highlight for CX handover

| What kind of unknown? | Potential risk |
| --- | --- |
| Unknown 1 (e.g. telephony) | No risk |
| Unknown 2 (e.g. Backend) | No Risk |
| Unknown 3 (e.g. XYZ) | Green |

# Additional Information

Helpful internal sources

* CCaas Integrations - [Link](https://www.notion.so/parloa/9563d6b83c0947628ad48fc9fde7d6e0?v=c963d0e4e905494db9a93da914a51588&pvs=4)
* Customer overview - [Link](https://www.notion.so/parloa/fd0f94acf94b49698c861272d11afbe5?v=fe2389395d2a446093f5530aceebd0d2)
* Chat Integrations - [Link](https://www.notion.so/parloa/Chat-Integrations-d69c44e29fff4e298952d90b4a8e1173)

Service Packages from CX

| M. | What Service package(s) and/or Add Ons are needed? |  |
| --- | --- | --- |
| M | Service/Add-On 1: | Price: |
| O | Service/Add-On 2: | Price: |
| O | Service/Add-On 3: | Price |
| O | Have any risks/red flags been identified |  |