# Scoping Document Phase Two

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** |
| O. | Customer Success Manager | [Austen Lake](mailto:austen.lake@parloa.com) |
| O. | CX Designer | **TBD** |

## Deployment Information

| M. | **Contact Center Solution?** | Genesys, Salesforce |
| --- | --- | --- |
| M. | Which Backend System(s) is/are in use **where customer data lives?** | Salesforce |
|  |  |  |
| 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 | TBD |
| --- | --- | --- |
| M. | Implementation start date | TBD |
| M. | Which Languages are needed? | AMP only (English) |
| M. | Do we have implementation phases? **Timelines:** | This is Phase Two, which includes authentication and custom skills. Phase One will have already been completed, which includes Routing and FAQ. |
| M. | What Channel do they want to use?   * Telephony | Voice/Telephony |

## 

# **Sales Engineer**

# Use Case Discovery

| Routing Skill | No, done in Phase One |
| --- | --- |
| Knowledge Skill (Conv. FAQ) | No, done in Phase One |
| Authentication Skill | Yes |
| E2E / Self-service - Custom Integration Skill | Yes |
| Custom Notes: Core use cases | SIM Activation, Account, Renewals |

## 

## Use Case Details: Customer Authentication

| M. | Will it be Identification or Authentication? **Caller is not authenticated 100% of the time, only in certain use cases** | SIM activation will take place - identification of SIM card will be necessary. Renewals may also require authentication |
| --- | --- | --- |
| M. | If Identification: How will the Identification work? | Else ⬇️ write below |
| M. | Which information will be required to authenticate callers and what format will this information have?  E.g. (Birthdate, 5 or 8-digit number, Alphanumeric number) | See below and this document -> [Validation Guidelines Mint[1].pdf](https://drive.google.com/open?id=1lEHzedvdV_HA6loYrOT5yc8gMVoV89ph) |
| M. | Do you need to Chain API calls for this Use Case? | Need to find out -> **Authentication**  **Level 1 Requirements - (require 2)**   1. Name 2. ICCID 3. IMEI 4. Last four of CC 5. Email Address 6. Mailing Address 7. E911 Address   **Level 2 - send one-time 4-digit temporary code using SMS (can also Send Email OTP)**   1. PIN/PUK Code Request 2. Voicemail Reset 3. Voicemail Password Reset 4. Suspend / Unsuspend Account 5. CDR Request.   **Level 3 - Send one-time 6 digit temporary code**   1. Port Out Information 2. Phone Number Change 3. Email Address Change 4. Sim Swap / Sim Activation 5. Mailing Address Change 6. Replacement pSIM/eSIM |
| M. | Which functionalities are supported to send data to your system? | Need to find out -> |
| M. | What authentication methods should be used to access your backend (e.g. Token, BasicAuth, IP Whitelisting)? | Need to find out -> |
| M. | Backend feasible? (Check backend section) | Need to find out -> |
| O. | Add any additional detail | Documentation -> [Genesis API .xlsx](https://docs.google.com/spreadsheets/d/1z5I0-D1-l_6UVpxlaboN2xXWYwfrvhkB/edit?usp=sharing&ouid=112680849449655125412&rtpof=true&sd=true) |

## E2E / Self-service - Custom Integration Skill

| M. | What exact use Case does the customer want? | Account Balance  Make Payment (PCI Compliance will be necessary)  Renew Subscription  Activate SIM |
| --- | --- | --- |
| M. | Can an example transcript be provided? | Yes? |
| M. | Which data points do we need from the caller to automate this workflow? | Authentication above |
| M. | Which APIs can we use to retrieve/send data from/to your backend system and Parloa? | We have a spreadsheet with key endpoints. |
| M. | Do you need to Chain API calls for this Use Case? | Need to find out -> |
| M. | Which functionalities are supported to send data to your system? | Need to find out -> |
| M. | What authentication methods should be used to access MintMobile backend (e.g. Token, BasicAuth, IP Whitelisting)? | Need to find out -> |
| M. | Backend feasible? (Check backend section) | Need to find out -> |
| O. | Please describe in as much detail as possible |  |

## Self-service Channel

| M. | Which Self Service channel will be used? | Need to find out -> Chatbot only |
| --- | --- | --- |
| M. | Will Parloa’s Services or external services be used? | Need to find out -> Yes |

## 

## Telephony

| M. | Do you want to connect to Parloa via SIP or via PSTN? | Genesys Cloud |
| --- | --- | --- |
| 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? | Yes |
| O. | Do you want to use TLS for call encryption? | Yes |

## 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 (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 |

## 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 | Salesforce |
| 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? | PCI |
| O. | Are there any specific security protocols or compliance requirements (e.g., GDPR, HIPAA) that need to be adhered to during the integration? | PCI |
| O. | Is there any documentation/architectural chart for the backend systems and interfaces/APIs you can share with Parloa? | Standard Salesforce API |

## 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? | Yes |
| O. | Which Analytics tool is in use? | Standard Genesys and Salesforce |
| O. | What KPIs do they want to report? | Volume, containment and handoff |

# 

# 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 |  |