# Project Scoping Document

This document is intended to ensure a delightful customer experience and a clean handover from sales to implementation.  
It serves the purpose of aligning the expectations of the implementation team by providing them with essential information. It also aids in identifying the right support packages required from Parloa when support is needed.

The documentation must be completed by the individual or team who participated in the sales process to delineate the parameters of the project agreement. Please ensure that all relevant information is reflected here, even if not specifically requested, in the default format.

| **Customer Name:** |  |
| --- | --- |
| **Link to additional information on the implementation** |  |

**Project Scoping Document**

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## 

# General Overview

## 1.1. Project Key Data

| Dialog (Bot Building) Implementation Partner |  |
| --- | --- |
| Telephony Integration Partner |  |
| Ecosystem Integration Partner |  |
| Call volume per month |  |
| Preferred Go-Live |  |

## 1.1. Use Case Overview

| Intent-Based Routing |  |
| --- | --- |
| Automated Customer Authentication |  |
| FAQ Automation (Rule-Based) |  |
| FAQ Automation (LLM) |  |
| Service Automation - (End-to-End or Self-Service) |  |

# Project Key Contacts

## 2.1. Project Team Contacts

| Account Executive / Partner Seller |  |
| --- | --- |
| Solution Engineer / Voice over IP (VoIP) Engineer |  |
| Project Manager |  |
| CX Designer |  |
| Data Analytics |  |
| Language Experts (If more than one language) |  |
| Further Contacts |  |

## 2.2. Customer Contacts

| Champion Name & Email |  |
| --- | --- |
| Admin contact for telephony |  |
| Admin contact for backend |  |
| Admin contact for contact center |  |
| Further Contacts |  |

## 2.3. Parloa Team Contacts

| Account Excecutive |  |
| --- | --- |
| Sales Engineer |  |
| Customer Success Manager |  |
| Solution Engineer |  |
| CX Designer |  |
| Further Contacts |  |

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# Technical Readiness Assessment

Overview of the technical infrastructure of the customer. The goal is to ascertain beforehand whether all systems intended to interface with Parloa have also been effectively connected and integrated before.

| Planned Contact Center Solution. (Existing experience in implementing Parloa in the solution?) |  |
| --- | --- |
| Planned VOIP technology integration. (Existing experience in integrating Parloa with the technology?) |  |
| Additional VOIP Technology in use |  |
| Outsourcers, BPO’s and other third parties |  |
| Current Agent Handover Technology |  |
| Backend System Accessibility from Internet (Is it REST-accessible?) |  |
| Backend System Inventory (Incl. Auth + Business Logic) |  |

# Integration Assessment

## 4.1. Forwarding & Handover

| Should the call be forwarded to an agent with handover information? |  |
| --- | --- |
| Which agent desktop software is in use? (e.g. Salesforce, Novomind, Genesys etc.)? |  |
| How is handover information displayed to the agent? |  |
| How will handover information be transferred from Parloa to the contact center software? |  |
| Is sending SMS to callers currently in scope in the project? |  |
| If so, will Parloa’s SMS system be used, or does the customer require integration into an existing system? |  |
| Is sending Email to callers currently in scope in the project? |  |
| If so, which email system will be used? Is integration into this system known with Parloa? |  |
| Will the bot need to create tickets in external systems such as CRM or ITSM? |  |
| Which ticketing systems are in use? |  |
| Are specific routing targets planned for the forwarding of the call? |  |

## 4.2. Telephony

| Do you want to connect to Parloa via SIP or via PSTN? |  |
| --- | --- |
| In case you are using 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)? |  |
| In case you are using SIP: What is the method of sending data back from the bot to your telephony system (e.g. SIP REFER w/ User-to-User-Attribute, call id & hang up)? |  |
| In case you are using SIP: Is your telephony system capable of accepting and handling SIP REFERs in order to transfer calls (e.g. to an Agent)? If not, can you provide a REST API that can be used for call control? |  |
| When you transfer a call to Parloa, does your SIP implementation support sending a SIP URI with a fully-qualified domain name (such as <customerid>.voip.parloa.com) for the SIP INVITEs? |  |
| Is there any documentation/architectural chart for the telephony infrastructure you can share with Parloa? |  |
| In case you are using SIP: Is your SBC exposed to the internet with a public IP address? |  |
| Do you want to use TLS for call encryption? |  |

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# Use Case Details

# 5.1. Use Case Details: Intent-Based Routing

| Please describe in as much detail as possible |  |
| --- | --- |
| Anticipated call volume |  |
| Will Intent Recognition be LLM based or rule based |  |
| Will Parloa replace an existing provider?  When does that contract or service end? |  |
| Will Parloa answer calls directly, or will calls be forwarded by IVR to Parloa? |  |
| In case you require authentication/identification of callers: How do your end-users currently authenticate/identify? Which information is required? |  |

## 5.2. Use Case Details: Automated Customer Authentication/Identification

| Please describe in as much detail as possible |  |
| --- | --- |
| Anticipated call volume |  |
| Will Parloa replace an existing provider?  When does that contract or service end? |  |
| In case you require authentication/identification of callers: How do your end-users currently authenticate/identify? Which information is required? |  |

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| Which authentication backends are in use? |  |
| --- | --- |
| How are your authentication backend systems hosted (e.g. on premise, private virtual Cloud, SaaS product)? |  |
| Is your backend system accessible via REST API? |  |
| Is there any documentation/architectural chart for the backend systems and interfaces/APIs you can share with Parloa? |  |
| What API authentication methods should be used to access your backend (e.g. Token, BasicAuth, IP Whitelisting)? |  |

## 5.3. Use Case Details: FAQ Automation (LLM or Rule-Based)

| Please describe in as much detail as possible |  |
| --- | --- |
| Anticipated call volume |  |
| Will FAQ be LLM based or rule based |  |
| Will Parloa replace an existing provider?  When does that contract or service end? |  |
| Will Parloa answer calls directly, or will calls be forwarded by IVR to Parloa? |  |
| Which FAQ data should be ingested by the bot?  Please provide as much detail on data formats and locations as possible. |  |

## 5.4. Use Case Details: Service Automation - (End-to-End or Self-Service)

| Please describe in as much detail as possible |  |
| --- | --- |
| Anticipated call volume |  |
| Will Parloa replace an existing provider?  When does that contract or service end? |  |
| Will Parloa answer calls directly, or will calls be forwarded by IVR to Parloa? |  |

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| How are your backend systems hosted (e.g. on on-premise, private virtual Cloud, SaaS product)? |  |
| --- | --- |
| How are your authentication backend systems hosted (e.g. on premise, private virtual Cloud, SaaS product)? |  |
| Is your backend system accessible via REST API? |  |
| Is there any documentation/architectural chart for the backend systems and interfaces/APIs you can share with Parloa? |  |
| What API authentication methods should be used to access your backend (e.g. Token, BasicAuth, IP Whitelisting)? |  |

# Additional Information

Please attach any available diagrams of the technical infrastructure, schematics, or additional information that may be available.