**ISDM Case Study Key Notes**

* Develop an information system to improve the operation of a travel company’s in-house call management centre (CMC).
  + The system will adjust the call flow rate to suitable Relationship Managers (RM).
* To provide improved call routing and dynamic call flow control for both inbound and outbound calls, the information system will provide assistance to RMs in serving their end-customers (or potential customers) and will match RMs and end- customers according to RMs skills and customers profiles.
* One way to improve the call flow rate is to match customers based on RM performance and product knowledge.
  + For example, in selling particular travel packages, the system would do well in matching end-customers to well informed RMs with appropriate knowledge about the destination and its traditions.
* Assume a supporting tool to create customer profiles exists, Profiler Tool.
  + A corresponding RM profile may depend on the age, sex, culture, language proficiency, experience and product knowledge.
  + The system sought will be used as a skill matcher between end-customers and RMs based on their profiles.
  + The system aims to increase potential for sales or service.
* RM profiles are initialized at hiring.
  + Employees take 10 min questionnaire, used to build a profile and a skill matrix.
  + System will adjust according to RMs subsequent performance in selling packages and in serving customers effectively and efficiently.
* For outbound calls, the system automatically dials numbers according to a customer target list generated by the system (from database).
  + It then displays the details and provides the RM with guidelines and a script to help in providing an improved service to the end-customer.
  + For the outbound calls, the system will create a target list (<potential customer, product proposed>) for each RM based on their skills and profile.
* For inbound calls, customers dial a number reaching the CMC which has its own private automatic branch exchange to route the calls.
  + A call routing and distribution routine that minimizes inbound call costs by reducing per-call handling time.
  + Skill score is calculated based on the RM’s previous call duration and profile.
    - A score from 1-10 based on the likelihood to purchase the product is given to a customer according to some preloaded criteria.
      * For example, repeat customers may have a higher score, customers from particular postcodes may have lower scores, etc.
    - Customers with the highest scores are served first. Their calls are directed to RMs based on skill levels and best match.
  + The schedule of dialling end-customers and the estimated call duration vary according to a RM’s skill level and previous performance.
* During busy times, inbound customers can be directed to an Interactive Voice Response unit prompting them for options, and may even ask for call reasons in a few words and then redirect the call to an Automatic Call Distributor routing the call to the first available appropriate RM.
  + Customers may hang up when they suffer from a long wait time.