



## Proposed Solution Document for Uber



## Table of Contents

<b>Proposed Solution for Uber .....</b>	<b>2</b>
Proposed Solution .....	2
Introduction .....	2
Overview .....	2
Objective .....	2
Purpose of Document .....	3
References .....	3
Technical Summary .....	4
Essential Features .....	5
Overall Solution Overview .....	7
Key Benefits .....	9

## Proposed Solution for Uber

### Proposed Solution

#### Introduction

This document highlights the software and technical capabilities being proposed to Uber to manage Web-chat , with the responses supported by Teleperformance as an outsourced service partner.

We have the expertise in developing customized CRM solutions for our clients ranging from different domains and have the necessary processes in place for integrated and cohesive solutions to manage customer service.

We work with technology partners to provide the following solutions based on the client's needs and discretion:

- Design & Implement CRM solution
- Customized and automated reporting structure
- Process Digitisation
- Technology upgrade and integration

Our proposed solution will help Uber deliver quality service through a centralized easy to use application.

#### Overview

Uber intends to outsource the development for chat solution to support Web-chat interactions.

Towards this, Teleperformance would like to showcase their capabilities with the following proven strategies to drive results:

- Web-chat
- Dashboard reports
- Administrative capabilities

#### Objective

Teleperformance intends to implement chat solution supporting instant messaging via Web-chat. The main objective of the tool is to accomplish the following:

- TP Client Chat solution with provision for logging service request for Web-chat and tracking them for closures

- Reports that will provide statistics on the Uber chat process, day-to-day operations.
- Administrative capabilities –Data allocation, Master & User management

This would comprise utilising new technology to realize and enhance the business requirements to achieve business and stake holder's vision.

### Purpose of Document

The purpose of this document is to specify the project features, deliverables, assumptions and scope of the intended solution.

The audience of this document are project stakeholders at Uber and Teleperformance Operations team handling this process.

### Document Scope

This document would provide a listing and classification of all the requirements that the proposed application would satisfy.

### References

Reference basis for this document is the requirements shared by Uber in the month of April 2021.

### Assumptions and dependencies for Webchat service Development

- This document only showcases the proposed features and is not binding for development. Features for development would be signed off separately by the client.
- Pre-sign off phase would involve detailed requirement gathering session or period where process flow, business logic and specific client requirements would be gathered and elicited.
- Prior to development the SRS document should be mandatorily signed off and approved from all concerned client stakeholders.
- The entire application would be developed using Microsoft .Net technology and Database server would be SQL 2016 Enterprise edition
- For Email Notifications if any to be sent, the email ID would be provided by Client, along with SMTP details and access credentials required for sending emails.
- For notifications to be send by SMS, if any. SMS Vendor, whose services would be utilized for sending SMS, to provide the URL and API details basis which SMS would be automated through CRM.
- Standard API consumption factored in TP Client, without any custom development in TP Client.

- No data migration factored in the current proposal. Data migration, if required, to be taken separately, where Teleperformance would share the format of the data to be provided by Uber.
- Application user interfaces will be in English language only.
- For any integration request with Uber or third-party sub systems, we assume, software will provide a Web API (Web Services, HTTP POST, XML). Efforts for integration, to be shared post study of type and level of integration required with Uber System or any other Client provided system
- The scope does not include importing existing complaints to the Call Centre software (Ticket Management). Follow up on existing tickets from Uber, to be handled as new ticket, with specific rules to be set in SRS phase.
- Any change request post SRS Sign Off would go through the Change Request process with impact analysis and estimated cost implications to be shared and approved by Client for implementation
- The costing is based on features and solution specifications as mentioned in this document. Any further changes and additions would mandate for a revision in the costing presented to the client.
- The Intellectual Property Rights of the application being developed for Uber would remain with Teleperformance Ltd. Source code for the application, would remain with Teleperformance and cannot be shared with Uber

## Technical Summary

Teleperformance proposes to develop interactive chat solution supporting Web-chat messaging, in Microsoft .NET Technology with SQL server 2016 as the back end.

To achieve Instant messaging chat CRM, Teleperformance proposes three-tiered architecture application, where one layer can be completely redefined, without affecting the other two.

This approach provides less risk, less fuss, less complexity, less maintenance cost. Further, it would be able to deliver a broad set of commonly needed features out-of-the-box, which our Customers can quickly customize, integrate and deploy to address their current and evolving business needs.

To achieve the above goals, we follow the below steps/practices:

1. Agile methodology of software development for all software projects.
2. The entire project would be well documented, and the documentation would contain User training manual and process flow documentation.
3. Teleperformance executes projects with the expertise of an in-house software team, hence enabling quicker response to change requests and hence speedy deployment.
4. Following are the Modules for the proposed System:

- a. Web-chat
  - b. Case management (ticket logging)
  - c. Report Module
  - d. Admin Module
5. CRM is seamlessly integrated with the Dialler to facilitate telephony features.

## Essential Features

- Customer Service
  - Detailed history of past contacts
  - Workflows with multi-party participation in case solving
  - Knowledge Base
  - Frequent Answers repository
  - Customer online case monitoring and feedback
  - Customer Alerts
- Online Support - Chat
  - Text Chat
  - Access Client information, scripts, frequent answers
  - Access chat and case history
  - Chat Agents monitoring
- Business Process Workflow
  - Flexible workflow definition
  - Back-office group assignment
  - SLA at Case and Task Level
  - Multiple Calendars and Schedules
  - Task notification, reminder and escalation
  - Custom States definition for cases
  - Private cases and tasks handling
  - Notifications
- Case Classification

- Multiple Process
- Multiple Classifier Dimensions
- Custom Forms and Fields
- Agent Scripting
- Quick Classifiers with hotkeys
- Customer Database
  - Multiple Customer Types
  - Custom Forms and Fields
  - Customer Contacts
  - Customer Products
  - Case/Attachments History
  - Online case monitoring and feedback
  - Customer Search/Merge
- Knowledge Base
  - KB Articles and attachments
  - Workflow for publishing
  - Folder Permissions
  - Product Catalogue handling
  - Standard Response Library
  - KB Simulations
- Security
  - Roles Based Access Control (RBAC)
  - No concurrent login
  - Block/delete/relocate Users
  - Password control information security standards (length, composition, history, expiry password, encryption, etc.)
  - Secure access of data
  - Administration on sensitive data

- GDPR Compliance (Personal Data Handling & Deletion, Tracking Customer data access, Customer Consents, Data Subject Rights, Business Purpose Retention)
- Reports
  - Customized reports as per client needs
  - Dashboard reports
  - Typically, 5-10 reports for entire suite
  - Output dump in client required formats & filters

## Overall Solution Overview

Teleperformance will provide a home-grown TP-Client Chat enabling the Chat activities and associated tools for CRM. The CRM would involve chat console for instant messaging.

These applications would be embedded in the Agent solution and would be accessed, based on services assigned to agents. Agent can access the chat module, with a complete trail of the customer interaction on various instances

### Functional overview

The key functionality of the solution would be

#### ■ Workflows

Custom workflows in TP Client manage pending issues and automatically assigns responsibility to solve cases. By presenting work that needs to be completed it ensures consistent issue resolution. Workflows can be configured to match the needs.

- Automate Detailed Workflows: The agent can view the associated workflow, with the details of each task, and the custom states associated with the workflow. Each step in the workflow can be configured to have a time limit, and as each step is completed the workflow will move the user to the next step.

#### Post Chat

Name	Field Type
Support provided	Dropdown
If other please specify	Free text
End result	Dropdown
If OC / Jira raised, please specify the ident	Free text
Flex Budget	Dropdown
Amount Approved (Please mention 0 in case rejected)	Number Only
RCA for support required	Dropdown
Comments	Free Text



- Task Responsibilities: Tasks can be assigned to multiple users and can be dynamically calculated.
- Task Cycles: Create workflows with cycles or loops, where a task can be executed multiple times.
- Decision Tasks: Change the workflow path based on yes or no answers.

#### ■ Webform

Provide a webform for the advisor to login and interact with the supervisor. Webform will be used to validate the user and capture the basic details.

##### Pre Chat

Name	Field Type
Contact link (Bliss)	Small text
Contact type	Small text
Queue	Drop Down
Reason for contact	Drop Down
Details	Free text

#### ■ Documents

Provide a comprehensive, searchable database of common customer submitted issues, requests, and resolutions.

- Knowledge Base: Searchable repository of documents and product details.

Find Solutions to Common Issues with documentation such as troubleshooting information, how-to articles, user manuals, product specs, and FAQs, all stored in the Knowledge Base for easy access.

- Customer History

TP Client can show the case history across every channel, making sure that agents have all the necessary information to best help the customer.

#### ■ Reports & Dashboards

- Standard Reports: TP Client provides a robust list of standard reports that can be exported to Excel for modification.

- Workflow analysis and consistency, Cases (details, average handle times), Survey results if any, Chat, Knowledge Base, Access logs, Instant messages.
- Custom Report: TP Client also includes provision of Custom Reports.
- Dashboards: Real-time, visual reporting of TP Client data. Customized dashboard views with graphical presentation of reporting data.
- Tables (Table, Bar-table, Heat-map, Row heat-map, Column heat-map), Pie-chart, Line-chart, Bar-chart and Stacked-bar

#### ■ Administration and Security

The Admin User would have the ability and permission to configure all system functions such as security/ data upload, profile management, team/User management, User role and rights, report management, master data management etc.

### Key Benefits

Our entire effort focuses on enhancing Customer relationship and maintaining trail of Customer interactions for easy references.

- Customer relationship:
  - Maintaining consistent and meaningful dialogue with customers
  - Enhance customer relationships.
  - Single view customer history
  - Customer trail with latest updates
- Operation level benefits:
  - Service level access provided through admin utility
  - Build productivity
  - Provides vision on Advisor performance
  - Real Time Customized Reporting.
  - Data available in client required format.
- Technical benefits
  - Secure Centralized and highly available data.
  - Administration on data is easier
  - Voice and data synchronization