Articles
Over the past several years, we have been asked to submit articles for several trade journals.

Following is a list of these articles and others we have put in our own newsletter.

The Golden Rule of Call Accounting
– TELECONNECT June 1998
(It's still true today.)

I have been involved in the sales, installation, and training of more than 300 call accounting systems. The most significant thing I have learned from these labors is that getting the best value from a call accounting system demands a "labor, belief, and intelligence investment" from the customer. Unfortunately, too many customers will, after buying a system, sit through an hour of training and never really learn how the system works. Then a month later, they may sit down with it and expect it to magically produce reports. A call accounting system can provide significant benefits, but only if it is used properly.

The following are some of the steps a system administrator needs to take, to insure that an investment in call accounting reaps rewards:

* Distribute a memo from a top company officer announcing the installation of your system, indicating their endorsement and support of the system. Use the memo to restate corporate policies on personal telephone use.
* Help the vendor set up the database that the system will use. This information consists of your company's hierarchy, a list of extensions with name and department assignment, trunk information, and call pricing information. You'll need all this information to produce meaningful reports. You'll also need to understand it — in order to modify it later.
* Practice using the system after the training, to apply what you've learned. You'll remember it better.
* Understand how to add, delete, and modify items in the database. Walk through the process of doing moves, adds, and changes several times. Teach another employee how to do it (there's no better way to check your own learning than to try to teach something to somebody else).
* Commit to making necessary changes on a regular basis. If the database is not current and accurate, reports will not be taken seriously and they will not be used effectively.
* Understand what reports are available and how to produce them. Make up a list of some of the basic reports with samples, and distribute them to department managers. Find out which reports managers want to see, and produce and distribute them regularly.
* Develop a maintenance schedule of items and make sure that at least one other person knows it.

Each system will vary, but some of these items include:

Daily: Make sure that calls are being processed. Check buffer.

Weekly: Make changes to database to insure that reports are accurate.

Monthly, or as needed: Produce and distribute reports. Managers will learn to depend on this information.

Back up previous month's calls and current database.

Quarterly: Make sure area code updates have been supplied by your vendor and add them to your system. (And your PBX!)

* Make sure your backup person is familiar with the system and knows how to contact the vendor for support, additional training, updates, etc.

* Monitor results and inform top management of any successes that result from installing the system. It will benefit your career and increase your importance to the company.

Telecom Reseller – series of articles, entitled: “Call Accounting Tips”

<u>#1 in a series of articles on call accounting issues”– May 2002</u>

Why do you suppose every business doesn’t have and use a call accounting system?

Usage represents approximately 70% of your telecommunications expense. The easiest way to reduce this is to install a call accounting system and distribute reports.

There are many factors to consider in the selection of a call accounting system and several things that should be done to use it effectively. Following are a few of the items that will be discussed in detail in future articles:

Using a System Effectively
• Announce its installation from a HIGH level executive
• Assign an administrator who will take the responsibility seriously
• Generate and distribute reports regularly
• Educate department heads and promote use of reports.
• Update area code changes at least quarterly.

Items to be aware of
• Call durations – off hook or connect time?
• The real cost of making a phone call has to include the personnel cost.

Desired Functionalities
• Synchronize with other databases to save labor
• Toll fraud and call alert
• Scheduled reports
– send to email addresses— saves time and trees.
• Network and web-based access to system and reports

Purchasing a System Intelligently
• Don’t purchase as part of a PBX purchase’– make it a separate decision— we’ll explain why.
• Don’t buy more functionality than you can use.
• Ask for several references and call them
– questions to ask will be included.

#2 in a series of articles on call accounting issues – June 2002
Installation Requirements (aka - Prior Preparation Prevents Poor Performance)

Question:
After I select a system and vendor, what needs to happen to install a new call accounting system?

Answer:
Preparation will vary widely depending on the complexity and size of the system, number of sites, etc. Accurate and thorough preparation is essential to the success of any installation. Following is a description of items that need to be addressed by each of the parties involved. In some cases, the PBX vendor will also be the call accounting vendor.

Customer:
* Provide a PC configured with the recommended specs, not the minimum.
* Provide an administrator and at least one alternate to be responsible for the system. They should be competent with computers and most important, should actually "care" about the system and the reports it produces.
* Prepare and provide a database of Extensions, Names, Dept., Division, etc. to the call accounting vendor for import. This is necessary to ensure that each manager can get reports for only their employees and top management can see reports sorted by hierarchial level.
* Provide desired call pricing for all types of calls. This should include local and long distance vendor information, price plans, etc. Some organizations may want to price calls at a higher rate than their actual costs.
* Announce the installation to all employees in a memo from a high-level executive. The higher the executive, the more it shows employees that the use of a call accounting system is endorsed by top management.
* If the system is to be connected to your network, have an IS technical person review the specs and be present at the installation to ensure security issues are addressed.

PBX Maintenance Company:
* Program PBX to generate call records for both incoming and outgoing calls for all trunk groups.
* Provide the call accounting vendor with details of the SMDR output; baud rate, etc.
* Provide list of trunk groups and members with descriptions for import into the system.
* Deliver SMDR records to the location where the system will be installed.
* Have a technician available during the installation process.

Call Accounting Vendor:
* Provide customer and phone vendor all necessary information for their part of the project.
* Provide forms that need to be completed by each party and require that these forms be completed prior to scheduling installation.
* Schedule an installation date and time that is convenient for the customer and the PBX vendor.
* Provide training, as needed for the system administrators.

* Provide customer with written routine maintenance requirements such as updating area code tables, etc. and who to contact for on-going technical support.

#3 in a series of articles on call accounting issues - July 2002

"Sync" your call accounting system database with external databases
External databases, most notably those in PBX Administration systems can be used to automatically update a call accounting system's database.

The objective is to make call accounting system reports' accurate and believable. An inaccurate, out-of-date database produces reports which have little credibility, therefore very little value. A secondary benefit of automating this process is to eliminate the extra labor required to manually input this data and also reduce the errors that are inherent in manual input.

Avaya's Terranova, DSA and ASA programs and Nortel's MAT and OTM are popular software programs that perform adds, moves and changes in a windows program that is easier to use and requires less technical training than directly accessing the PBX. Other products include Unimax and PhoneMaster that can be integrated with some call accounting systems.

Often these programs do not include all of the fields that are needed in a call accounting system, such as; department, division, cost center, etc. This "missing" data can be imported from other databases such as human resources.

Future articles here will include more tips on how to use a call accounting system effectively and purchase it intelligently. We will explain how to use this valuable tool more effectively, using real examples from our customers. (We will be presenting a workshop at the 2002 INNMUG conference in Miami on this topic. #BA09)

Your
questions are encouraged. We will answer them personally and print them in future columns.

#4 in a Series of Tips on Call Accounting Systems

– Aug., 2002

This month's article covers a few issues that we deal with regularly.

Operator Statistics
We get calls from organizations that want detailed console activity reports.

Unfortunately, most PBXs' SMDR records do not provide enough information to get this information from a call accounting system.

There are however, a few PC-based consoles for some PBXs that do provide both detail and summary reports on operator activity.

Some of these reports show things like; # Calls Received, # Calls Answered, # Calls Transferred, Maximum # Rings, Average Talk Time, Maximum and Average Hold Time, # Abandoned, etc.

Don't buy more functionality than you can support
We frequently speak with businesses that purchased a multi-module telemanagement system expecting that the system would provide substantial benefits. They soon came to realize that each module requires a certain amount of time to populate, learn, administer and manage in order to realize these benefits.
Once they realize the amount of time required, they come to the realization that they simply do not have the FTE to utilize it effectively and basically abandon the function. They end up with "egg on their face" with management by having requested and spent hard-to-come-by funds for a product that become useless.

The Lesson – Before purchasing these modules, speak to other users (hopefully references from vendor) and ask lots of questions about the value of the benefits and the amount of time required.

"I just want something cheap!"
This is usually the beginning of a conversation from someone calling to inquire on our products. When you shop for a PBX or Router or ACD or Voice Mail, do you also say, "I want something really cheap?"

I would like to have somebody say, "I want something that has great value, offers great support and is reasonably priced."

"Really cheap" implies, I don't want the best system and don't care if I get any support. If a purchasing decision is based on this criteria, the end result is usually predictable.