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Telemarketing scripts

There are 2 types of TM scripts:

Basic – for a typical data capture form

Complex – for a logic-based form where the responses drive the users journey. This can be used as a pre-qualification, Knowledge management or training tool.

Both these scripts require some preparation before creating them on CustCentric. This is to ensure that what will be created is logical and flows from a usability point of view.

How to create a Basic TM script

A Basic TM script can be considered similar to a paper-based application form whereby a user reads and enters information one page at a time, sequentially. It is still recommended to prepare beforehand.

The following example is similar to a 4-page form.

1. Click Telemarket Management button
2. Click Create Telemarketing – enter Name, Description and select Basic
3. Click the name of the TM script that was created in step 2
4. Create screens – enter screen names **Introduction, Personal detcs, General info, Conclusion**
5. Click the individual screen names to “build” the screens.
6. NOTE on Types:
 - Text** – a small text box generally used to capture one-line information
 - Text Area** – a large text box to capture multi-line notes
 - Select list** – definable values presented as a drop list. Only 1 value can be selected
 - Radio buttons** – definable values presented as radio buttons. Single selection only
 - Check box** – definable values presented check boxes. Multiple selections allowed
 - Script** – Non alterable text for documentary purposes
7. Add Questions/Scripts to “build” the screen, then click OK
8. Click the “Question” to add the answers, then click OK
9. Repeat steps 5 – 8 until all screens have been built
10. Click Test Telemarketing to ensure it works



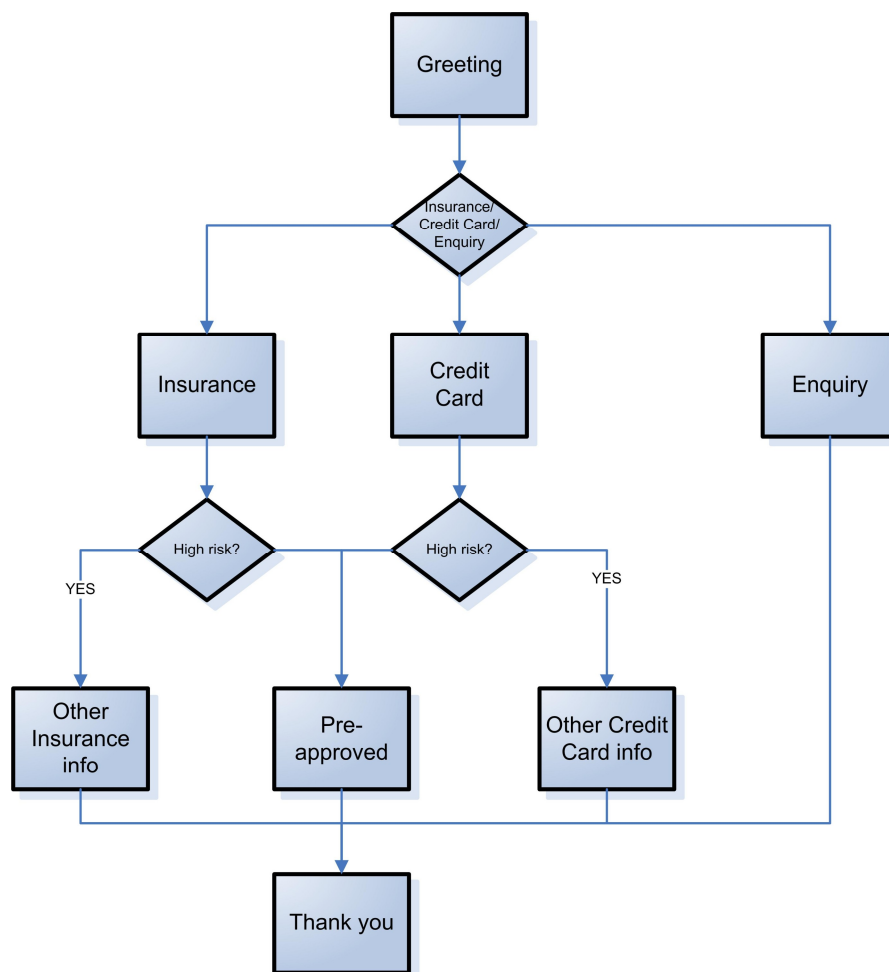
How to create a Complex TM script

A Complex TM script is a logic-based script that can be used as a pre-qualification tool. The navigation or journey is controlled by the responses of the user, thereby allowing them to skip parts of an application that are not relevant.

Other applications of a Complex TM script include:

- Training on the job for new staff. They can use a Complex script as a problem diagnosis tool.
- Knowledge management – share the knowledge and skills of more experienced staff. They can create a series of scripts to demonstrate the types of issues and resolutions.

The example uses the following diagram:



1. Click Telemarket Management button
2. Click Create Telemarketing – enter Name, Description and select Complex
3. Click the name of the TM script that was created in step 2
4. Create Branches – Greeting, Insurance, Credit Card, Enquiry, Other Insurance, PreApproved, Other Credit and Thank You. It is recommended that the Branch names be prefixed with numbers so they are presented in order. Ie, 01-Greeting, 02-Insurance etc
5. Set one of the branches as the first. In this example it will be 01-Greeting
6. Click each Branch and Create screens – each Branch can have one or more screens.
7. Click the individual screen names to “build” the screens.



8. NOTE on Types:
 - Text** – a small text box generally used to capture one-line information
 - Text Area** – a large text box to capture multi-line notes
 - Select list** – definable values presented as a drop list. Only 1 value can be selected
 - Radio buttons** – definable values presented as radio buttons. Single selection only
 - Check box** – definable values presented check boxes. Multiple selections allowed
 - Script** – Non alterable text for documentary purposes
9. Branching questions can be of the type Select List or Radio Button. A Branching questions determines which Branch will be displayed next based on the response. Each Branch can ONLY HAVE ONE branching question.
10. Add Questions/Scripts to “build” the screen, then click OK
11. Click the “Question” to add the answers, then click OK
12. Select the branching question and Click Set As Branch Question.
13. From the pre-defined responses, select the resulting branch (Child branch) from the drop list, the click OK
14. Repeat steps 5 – 13 until all screens have been built
15. Select View Telemarket and click Branches tab to ensure all Branches have “Children”. Only the last Branch (see diagram below)
16. Click Test Telemarketing to ensure it works

View Telemarket

Account: [American Express](#)
 Telemarket: Complex example
 Description:
 Status: Active
 Step: Pending
 Type: Complex

Branches	Screens	Scripts	Activities	Responses
Branch Name	First Branch	Children	Operations	
01-Greeting	True	03-Enquiry 04-Credit Card 02-Insurance	View	Edit Del
02-Insurance	False	06-Pre Approved 05-Other Insurance info	View	Edit Del Set As First
03-Enquiry	False	09-Thank you	View	Edit Del Set As First
04-Credit Card	False	08-Other Credit info 06-Pre Approved	View	Edit Del Set As First
05-Other Insurance info	False	09-Thank you	View	Edit Del Set As First
06-Pre Approved	False	09-Thank you	View	Edit Del Set As First
08-Other Credit info	False	09-Thank you	View	Edit Del Set As First
09-Thank you	False		View	Edit Del Set As First

Name:

Description:



How to start using a Telemarketing script

To start capturing Customer Responses the Status of the TM script must be set to Started.

1. Click Telemarket Management button
2. Click the name of the TM script you want to "Start"
3. Click Change Step
4. Click Start button

The TM script is now ready to be used. To begin capturing responses:

5. Select a Customer by either clicking Customer Management, View Customer lists or Search
6. Click the Name or Customer ID
7. You will be presented with the View Customer details screen
8. Click Run Telemarket and go through the screens
9. Upon completion, click Finish. If you are unable to complete the TM script, click Save. These scripts can then be return to later.