Customer Setup Requirements

Dear Customer

Thank you for subscribing to Smartdesk, we hope the procurement process has been smooth so far. This document is for you to record details about your business and or existing front office communication function to enable us setup Smartdesk for you. If you need any help completing this form, please feel free to email us at onboarding@smartdesk.intelliteck.ai or call us on call using the number closest to your region from this list at https://smartdesk.intelliteck.ai/supportnumbers

Customer (company) Name		
Address (Head Office / Where Smartdesk is to be deployed)	Post Code /Zip Code:	
	Country:	
Smartdesk service(s) ordered		

Section 1 - Point(s) of Contacts

First Name		Surname	
Email			
Phone			

Name		Surname	
Email			
Phone			

Section 2 – Front Office at your Organisation

Ref	What Front Office functions do you have?	Reception ☐ Direct Sales ☐		Customer service ☐ Other ☐ *please specify*	
1.	Activities performed by your front office	Reception:			
		Customer Service			
		Direct Sales			
		Other:			
2.	Provide your telephone numbers for	Reception		Customer Service	

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		Direct Sales		Other	
3.	Number of staff employed in your front office function	Reception		Customer Service	
		Direct Sales		Other	
4.	Name of your phone provider(s)				
5.	Which of your Front desk functions have you outsourced?				
6.	How many staff do you have in your organisation as a whole?				

7.	List the IT Systems / Apps your Front desk team have access to and how many users they support	System/App	Used for (e.g. calendar/diary, email, excel, CRM, ticketing system)	Number of users supported

8.	Where are the systems and Apps listed above hosted	Cloud service ☐ Onpremise ☐ Other ☐
9.	Please provide any other relevant information	

Section 3 – Business Activity(ies) & Industry

1.	Please describe your business / organisation activity (ies)	
2.	Where are your customers located?	
3.	In what language(s) do you do business?	
4.	What Industry/Sector Is your organisation?	

5.	How many people are employed at your organisation			
6.	What is your business opening hours?	Monday		
		Tuesday		
		Wednesday		
		Thursday		
		Friday		
		Saturday		
		Sunday		
7.	What time of day do you experience peak and troughs inbound calls	Peak:		Trough:
8.	What month or time of year do you have a high customer demand? Please provide event in 2nd column	January		
		February		
		March		
		April		
		May		
		June		
		July		
		August		
		September		
		October		
		November		
		December		
9.	What function would you delegate to Smartdesk			
10.	Please state any relevant compliance or regulatory standard. (e.g. GDPR, ISO 27001, PCI DSS etc)			

Section 4 - Smartdesk Service

1.	What Smartdesk Service have you ordered?	
2.	We will a copy of your scripts for all relevant functions. If non exists, we are happy to help develop this	Receptionists Customer service Sales IT tech support Other
3.	In what language would you like Smartdesk to operate?	
4.	Do you have a knowledgebase for your front office team?	

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5.	Do you have an induction document for members of your Frontdesk team?	
6.	Please provide the names of your front office agents	
7.	How are your users / customers verified prior to service?	
8.	Would you require call recording	
9.	Call records may be available online for 90 days. please specify if you require a longer time	
10.	What level of reporting would you require? If any	
11.	If custom voice is required, please provide details	
12.	Please provide names of the team lead/supervisor and another person in the front desk team for call handover when Smartdesk is unable to complete a task	
13.		
14.	We typically give Smartdesk callers the opportunity to opt out of the bot service if they insist on speaking to a human. Would you like this opt out for your customers/users?	
15.	An additional free benefit of Smartdesk is a free internal phone communication for your organisation. If you would like to take up this benefit, please provide a list of the names and email addresses for the staff members.	**Note: please specify where only internal calls permitted or if outbound connections required as well.** **Also state where a user may require a direct inbound number.** *These users will be required to deploy our IP phone client software on their computers and or mobile devices*

Section 5 - Other Requirements

Depending on Smartdesk service ordered, we will need you to provide us with the following

- Username and password to the relevant systems recorded above
- Access to your customers / users' database (not their records or personal information) for verification purpose
- Access to systems and information currently used by your front desk functions
- A copy of the script used by your reception, customer service, helpdesk or direct sales teams
- An org chart for your business users and teams served by your front desk team