

Call Logging & Analysis Software

Running an effective help or advice line service can be a daunting prospect – keeping call and caller records in order, maintaining confidentiality and Data Protection standards, and finding the time to compile valuable statistics.

Helplinepro from Fisk Brett brings a solution to these problems.

An efficient call handling and tracking system, Helplinepro allows you to concentrate on dealing with calls and enquiries, whilst providing an easy to use, non-intrusive method of data capture.

Information about callers (if applicable), call topics and resulting actions can be logged with ease.

What's more, if you wish to 'signpost' the caller to other advice-giving agencies, Helplinepro will locate those nearest to the caller and allow you to provide a high level of customer service.

Helplinepro will retain caller contact details – with their permission, of course – in order to build your organisation's contact database for future fundraising, membership or marketing initiatives.

Caller confidentiality is respected at all times. Helplinepro includes tools to purge personal data whilst retaining valuable statistical information.



helplinepro

What is Helplinepro?

It is call logging and analysis software offering:

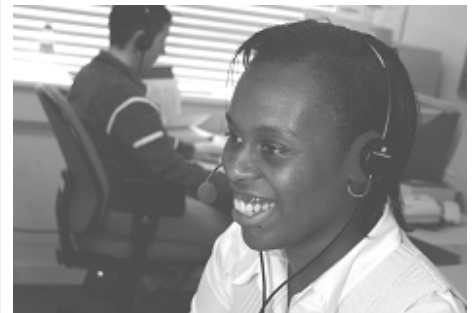
- **Efficient call handling**
real-time call entry, rapid address recognition from postcode, and batch fulfilment processing
- **Rapid call entry**
simple point and click functionality, with multiple call handling, means you can capture call data quickly, accurately, and sensitively
- **Total flexibility**
you can run any number of call schemes, each with their own set of call parameters
- **Maximised customer service**
enables call handlers to concentrate on the caller, not the computer
- **Timely information**
data is stored so as to allow very powerful reporting and analysis using tools such as MS Excel®
- **Confidentiality**
full features to enable calls to be handled whilst retaining caller anonymity and confidentiality

One parent families

The National Council for One Parent Families operates the Lone Parent Helpline, a national service, providing support and information to 17,000 callers last year – a statistic that was easy to produce, thanks to Helplinepro

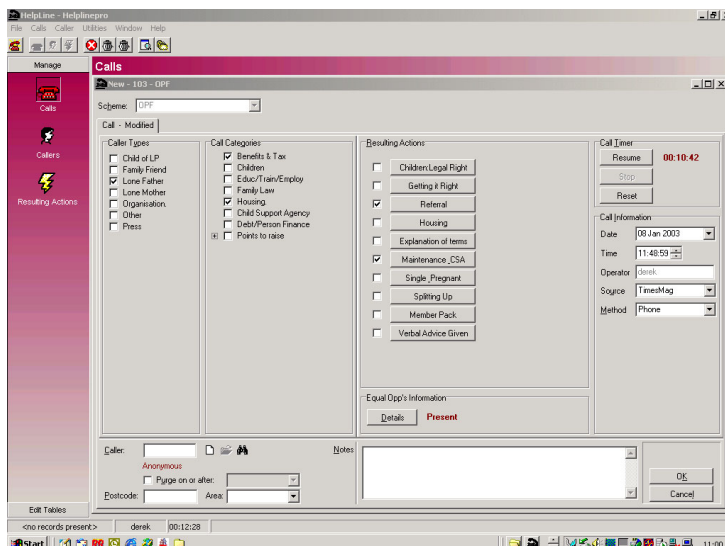
Natasha Benenson, Head of Direct Services recalls, "we used to have only a handwritten call monitoring system and input rudimentary information into an Excel spreadsheet each month. This was really time consuming and involved a lot of duplicate effort.

"We wanted to develop a system that would improve our method of recording and monitoring calls, allowing us to properly capture names and addresses and make sending information to callers much easier.



As many THA members have found, there are a mind-boggling number of database suppliers and packages in the market, yet a frustrating drought of solutions specifically designed to meet the needs of helpline organisations in this way.

For the full case study contact Fisk Brett. For more information on One Parent Families, visit www.oneparentfamilies.org.uk



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Helplinepro in General

• Helplinepro is fully featured call logging and analysis software for helplines, advice lines and call centres

- Multi-scheme design allows you to design call handling screens for different schemes / lines / accounts
- Works with database of advice agencies for 'signposting' (referrals)
- Optional link to the ProgressCRM database to enable caller information to be retained for future contact
- Robust design capable of high-volume, high-capacity operation, or occasional use
- Designed in the UK with built-in support for UK-oriented features, and with UK-based customer support

Calls

- Scheme selection – i.e. which service is this call for? Call entry form varies according to scheme selected (can default)
- Caller type(s)
- Call categories – multi-level selection with ability to expand and collapse the list
- Resulting actions – publication requests,, signposting and other forms of follow-up
- Call timer – automatic, with suspend and resume
- Call stamped with date, time, operator id
- Call source and method
- Review previous call history if any (unless anonymous)
- Capture postcode and automatically link to area code for geographical analysis
- Call notes
- Flags to indicate whether caller information to be purged following fulfilment of enquiry
- Equal opportunities survey information – for optional statistic gathering if funder requires

Callers

- Name, address and postcode, phone, fax, email, job title and organisation if applicable
- When linked to Progress®: membership status, giving history, contact history, volunteer groups

Advice Agencies

- Database of agencies to whom callers may be signposted (these can be maintained, or bought in)
- Services provided by the agency
- Agency type – national, local etc
- Agency Group
- (e.g. Citizens' Advice Bureau, Debtline etc)
- Geographical areas covered
- Opening hours information
- Agency contact names

Data Entry

- Familiar, easy to use, Windows look and feel, with Outlook-style screens
- Point-and-click call-centric interface, enabling multiple call entry
- Rapid address recognition using AFD postcode products
- Mouse and/or keyboard entry – non-sequential data entry – does not force caller to answer questions in order

Security

- User id and passwords
- Access and security rights strictly controlled by Systems Administrator
- Individuals can be assigned 'roles' within call schemes

Reports and Queries

- Comprehensive library of standard reports
- Optional Report Writer for creation of your own reports, or modification of the standard reports
- Simple point-and-click on-screen filtering features
- Filters can be saved for dynamic re-use
- Open database access enables you to use other reporting tools of your choice (data model documentation supplied) according to permissions

Integration

- ProgressCRM– optional link allows the retention of caller information for future contact
- MS Word® for mail merging and ad-hoc letter production
- MS Excel® for data analysis
- MS Outlook® for caller signposting emails
- Export data to CSV and text files
- AFD Postcode Plus™ for rapid addressing and signposting according to distance

Flexibility and Customisation

- Creation of unlimited number of call schemes, each with their own user-definable fields and call entry characteristics for caller type, call categories and possible resulting actions
- Maintains balance of flexibility and supportability – allowing customisation to be retained following future upgrades
- All dropdown lists user definable

Support

- Unlimited access to help-desk in office hours
- Free upgrades
- Proactive account management to assist strategic use of software

Implementation

- Standard or Tailor-made implementation (according to requirements)
- Managed approach, experienced product specialists
- Data conversion from existing systems if applicable
- Full training given according to needs

Technical & System Requirements

- Based upon MS SQL Server (supplied if not already present)
- Client PC – Windows 98, NT, 2000 or XP
- Desktop Edition – up to 5 users – requires server with minimum Pentium III 800mhz processor, 512 RAM, 1gb available hard disk space, MS Windows 2000 Server or Small Business Server 2000
- Client Server Edition – from 3 users to unlimited - requires server with minimum Pentium III 1ghz processor, 1gb RAM, 5gb available hard disk space, MS Windows 2000 Server.



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