

## ***Events***

**Quantrax has created a radical yet progressive method of working accounts in RMEx. Behold 'Events', a landmark but fundamental change that will transform how an agent works an account through account processing. This is another huge step forward for Quantrax and all its users. The RMEx GUI must be installed to utilize Events.**

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**Introduction** 

Now that we are a part of a much greater quest, there is one component of RMEx 2.0 that you will definitely want to implement. This component is our ground breaking feature called **Events**. It will greatly exceed your expectations by allowing you to *fundamentally* change the way accounts are worked in your system. We have exceeded the limitations of yesterday by creating a web based platform to bring features like Events to you.

So, managers can shift their attention from ‘smart codes’ to building Events. Managers who are familiar with work flows, smart codes and scoring will want to take an hour or two to review the following documentation and corresponding links. By acquainting yourself with the information presented in this documentation, you should be able to easily work with the standard deliverable for Events. The entire set-up should take approximately 2-3 days.

Events will transcend your current work flow ~

- making it easier to increase productivity
- standardize internal agent reports
- conform to regulations

Helpful hint:



The  icon will launch a document



The  icon will play an audio or audio video

**Simple step to improving productivity**

‘Thriving’ in today’s economic climate is somewhat difficult and can be very challenging. More and more consumers cannot pay their debt. In addition, more accounts are getting written off, making the job much harder. The need to get through more accounts to maintain the same level of productivity has become critical, so many have turned to third party vendors for scoring, skip-tracing and other offerings. But, what if you did not have to look outside your own collection software to boost productivity?

How can we improve our collection results? What does it take to improve employee productivity? It is important to explore new solutions to tap into the strengths of your workforce and to help motivate the worker. It is also very important to rethink the steps involved through-out the collection process and look for ways to improve those steps taken. Can any of these steps be eliminated? Is there a new method we can apply to an existing step or series of steps?

The need to integrate new solutions to make improvements to the collection process is mandatory. Investing and using the most effective tools will help keep costs down as well as working smarter to accomplish the same tasks and reducing the time it takes to complete those tasks.

We have developed a new web based platform called RME GUI. This platform will be required in order to add a particular new feature that will dramatically change the way accounts are worked. This new feature, 'EVENTS', is a vital step forward for Quantrax and all its clients.

## How Events work!



An integral part of a successful business depends on how well you manage your resources. Is it difficult to measure the value of an account and the work that has gone in to it? Are you currently applying 'internal scores' to an account when an action has taken place? Events will allow an internal score to be applied but, it is a 'Dynamic' process as well. A 'Dynamic score' can be associated with a specific action. As each action is taken, the score on the account is updated. Additionally, are agents applying the same smart code for the same incident? Are they consistent in their notation? If not, then relevant reporting cannot be accurate. By implementing Events, a critical area of collections can be modernized. The first step is to install Quantrax's new web based platform called RME GUI (Graphical User Interface). For details on RME GUI, please click on the following link:



RME GUI document

Once this interface is installed, all of the elements of a PC are available to the user. The user can multi-task, pointing and clicking on options available to them to accomplish a task. The second step is to build events. A standard 'Events' model is available to you, so much of the work has been completed. However, some details need added to customize the 'Events' for your company. Management **must** be involved to complete the set up. To do this, there are several items that need reviewed:

- ✓ Review smart codes used in model and change/update as needed

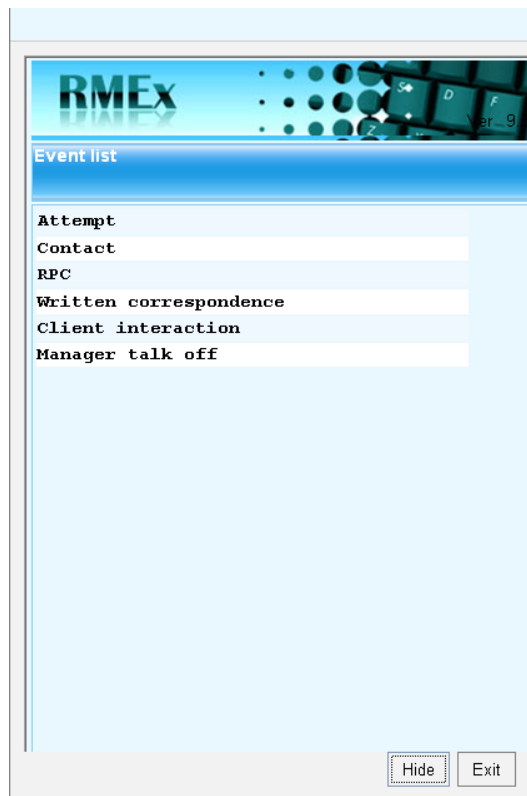
- ✓ ADD dynamic scores to sub levels
- ✓ Add or change notes applied
- ✓ Set up special processes such as client related events, insurance follow-up and legal

Once these items are set up, the 'Events flow' is set up and ready to go. Now any user can log into a GUI session and click on the 'EVENTS' button and point and click their way through the various options that best describe the action that took place. As each option is taken, the items set up for each level are applied to the account ~ each and every time the option is selected.

There are two types of Events, Main events and Sub Events.

*Main Events* are already predefined and cannot be changed. 'SUB' Events are the *USER defined* events or sub levels that need customized. By default, events are 'expandable', which means events can trigger subsequent events automatically. However, the 'Expanding' rules can be controlled at several levels; the Client, User, Description code, Account status, ACAT, Legal/non legal and Linked balances, so only the levels that are needed will be presented as options to the user.

Even though the Main events are predefined, they can be updated to apply a smart code, a dynamic score or add notes when the event is selected. The following screen shows the available Main events:



The main events *allow* all sub events by default, but the event flow can be stopped when needed. Additionally, notes can be applied by the event itself or by a smart code applied to the event.

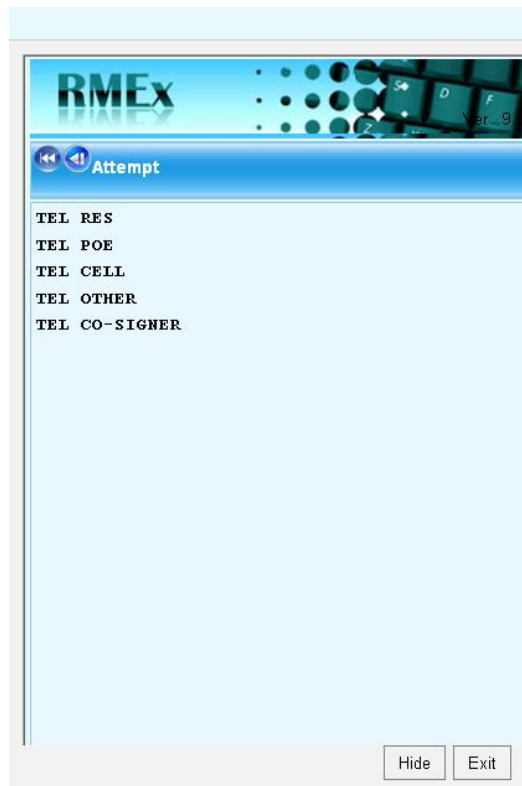
A letter, recall and/or follow up date can be made mandatory for the event too.

*Sub events* are all of the subsequent events that flow from the main events. There is no hierarchy to the sub events. So, the event flow would be as follows:

**Main event → Sub event → Sub event → Sub event → Sub event...**

**Sub event → Sub event → Sub event → Sub event...**

An example of Sub events (from the Main event - Attempt):



Remember, the main events are system defined, so ALL of the sub events can be created and built as needed. A typical call result would be, called home number, left message. Now that process needs to be set up using the events logic. The event flow would start with the 'Main event – Attempt. Then a sub event would need to be created. It would be called 'Called Home'. To set up the *next level* sub event 'Left Message', the sub event would need to be created *from* the 'Called Home' event. Now - does a score need to be associated with this sub event? Does a smart code need applied? Should entering a letter code be mandatory for this event? Should notes be left? Just update each sub event as needed.

**Attempt → Called Home → Left Message**

Taking full advantage of the event levels will allow agents to quickly make a selection from the available options listed,

accurately updating the account with smart codes management has applied, the dynamic score management has applied, the letter management has applied...

A whole host of opportunities is available to management to define the actions necessary at each level, confirming the details that are updated on an account, adhering to client needs or conforming to state regulations. What cannot be overlooked is the method of application. The agent will point and click on the option available, quickly updating the account as each option is selected. Additionally, the agent has NOT entered one smart code but ~ many smart codes may have been applied! The time it will take for an agent to update a call result or action on the account has dramatically been reduced. This process should reduce the amount of time it takes for an agent to work accounts. This is an extremely important factor with events. By significantly reducing the time it takes to work an account, agents should be able to work through more accounts in a day ~ increasing their level of productivity! If Dynamic scoring is also implemented, the events selected will be updating the score on the account as defined by management! Decisions can then be made, based on a Dynamic score!

**NOTE:** Dynamic scoring and Events should be run together so that you can maximize the benefits of Dynamic Scoring and take advantage of future enhancements.

Management Training for setting up the system controls for the “Events process”



Getting started with the “Events model”



## Benefits of implementing events

- ✦ Taking advantage of the new RMEEx GUI environment
- ✦ Agents No longer need to remember or enter smart codes
- ✦ New recruits will *never need to learn smart codes*
- ✦ Adherence to client standards
- ✦ Complying with prevailing industry standards
- ✦ Meeting regulations – making it easier to follow specific rulings
- ✦ Applying management standards
- ✦ Allowing management to SET and easily change standards
- ✦ Improved reporting data
- ✦ Better audit trails – notes can be understood more clearly by all
- ✦ Reducing the time it takes to notate an account – improved productivity
- ✦ Structure is flexible – for the user and designer
- ✦ Sub levels can be maintained easily

- ✦ Dynamically score an account based on the options selected
- ✦ Making many decisions behind the scenes based on **one** action taken

## Technology consideration for events

Adopting new technologies is a critical and necessary step for any company. With minimal investment, GUI, Events and other RMEEx 2.0 featured components can be added to your environment. Once you have secured the licenses for GUI, Events and all of the other components can be purchased. While RMEEx GUI *alone* does not require a separate server, RMEEx *Events* requires GUI and a separate (dedicated) server. Additionally, if any other product offered with RMEEx 2.0 is needed, a separate server will be necessary.

Quantrax generally builds the dedicated server for the components offered in RMEEx 2.0. The dedicated server is referred to as the 'QServer' and will be built to the specifications outlined below. The cost of the server is \$3000. It is built by Velocite, the same group that builds the I-Tel dialer. The server takes approximately two weeks to ship. If you would like to take this task on yourself, we suggest taking all precautions necessary to insure maximum server stability such as using RAIDed hard drives, redundant power supplies, etc. If you are building or purchasing your own server, you should have a solid understanding of the hardware involved, Windows Server 2008 Operating System, and IIS (Internet Information Services). The software for the components is \$1500 or \$500/each if installed by Quantrax.

### The minimum hardware configuration is as follows:

1. Intel Xenon processor – 2.0 GHz
2. Windows 2008 server – 64 bit
3. 6 Gb RAM
4. Raid 1
5. 2 x 1TB Hard Drives
6. Redundant power supply
7. 1 x 1 Gb Network card

### Prerequisites for loading Quantrax Software for the GUI server (QServer):

1. **Windows 2008**
2. **Windows updates installed**
3. **IIS must be installed**
4. **System i Access (formally Client Access), match version to your iSeries**
5. **.NET 3.5**
6. **ASP.NET must be registered in the IIS Web Server**
7. **IIS Web Server**



**Prerequisites** for the iSeries:

1. IBM Operating System - V5R4M0 minimum with 4 gig minimum memory
2. Current on PTF's
3. Latest cumulative PTF installed
4. WebSphere Application Server (V6.1) for i5/OS – 5733W61
5. WebSphere Application Server (V6.1) Express – 5733W61
6. HTTP Admin server
7. Java options 6, 7 & 8 – 5722JV1 – 6, 5722JV1 – 7, 5733JV1 – 8
8. WAS instance created

**Other considerations**

- ✦ Maintaining good records
- ✦ Maintaining good notes
- ✦ User friendly
- ✦ Practically NO learning curve
- ✦ Smart code entry still available

**Summary**

We now have 'Events', a simple but highly effective process that will help you apply the information needed in a more efficient manner. On some level we are pioneers ~ forging a new path for RMEx. New avenues need to be available to work smarter and to be more productive. New resources need to be available to continue to add value to your business. One way is to sharpen the tools we already have. By incorporating Events, smart codes will no longer be the *primary* source for updating accounts. By implementing Events, we are improving efficiencies: scoring with every action, applying a smart code with every action, adding notes or sending letters. The steps offered with 'Events' directs the agent by moving them through the event process, enforcing agent selections and allowing for increased management control over the actions applied to an account. The agent may only enter through a few events, but when the events are selected, *many* actions could be taking place!

Initially, the Dynamic score is acquired by the factors already existing on the account. When an Event has been assigned a score, and that event is selected, the Dynamic score is updated on the account ~ and decisions can be made on these values!

***The event process will have a direct correlation on productivity.*** By improving efficiencies, more accounts can be handled, greatly improving the potential to increase productivity. By reducing the length of time to complete a task, the agent is free to focus on other factors involved in ‘making’ the collection!

RMEx has always been an ‘event’ driven system. The system does not rely on ‘where’ the account is in its life cycle, it relies on an ‘outcome’ or ‘result’. These ‘Events’ drive the account through its life cycle in RMEx, and now we have a new feature that allows you to build an ‘events process’, to facilitate those ‘results’ or ‘events’ that need to be updated on an account!

*More effective actions make for greater results...greater results with less effort!*

