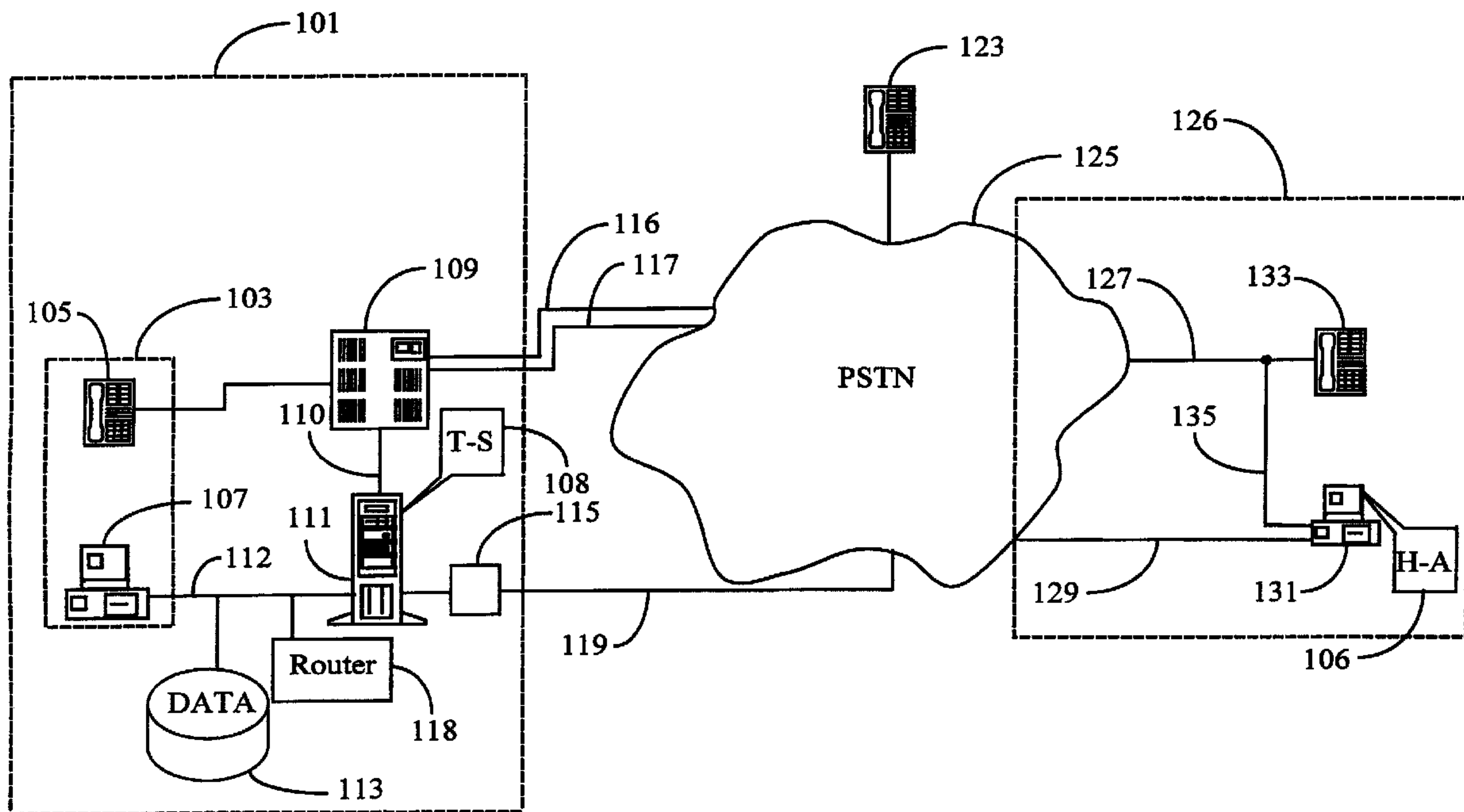




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(54) Titre : SYSTEME ET PROCEDE DE CENTRE TELEPHONIQUE AGENT LOCAL  
 (54) Title: HOME AGENT CALL CENTER SYSTEM AND METHOD



(57) Abrégé/Abstract:

A call center system supports remote agent stations (126) through a network (125) by establishing a data link (119, 129) between a computer platform (131) at the remote agent station (126) and a computer-telephony integration (CTI) processor (111) connected to a telephony switch (109) at a call center (101) and switching incoming calls from the call center (101) to a telephone (133) at the remote agent station (126) while sending data pertaining to the calls via the data link (119, 129) to the computer platform (131) at the remote agent station (126) to be displayed.

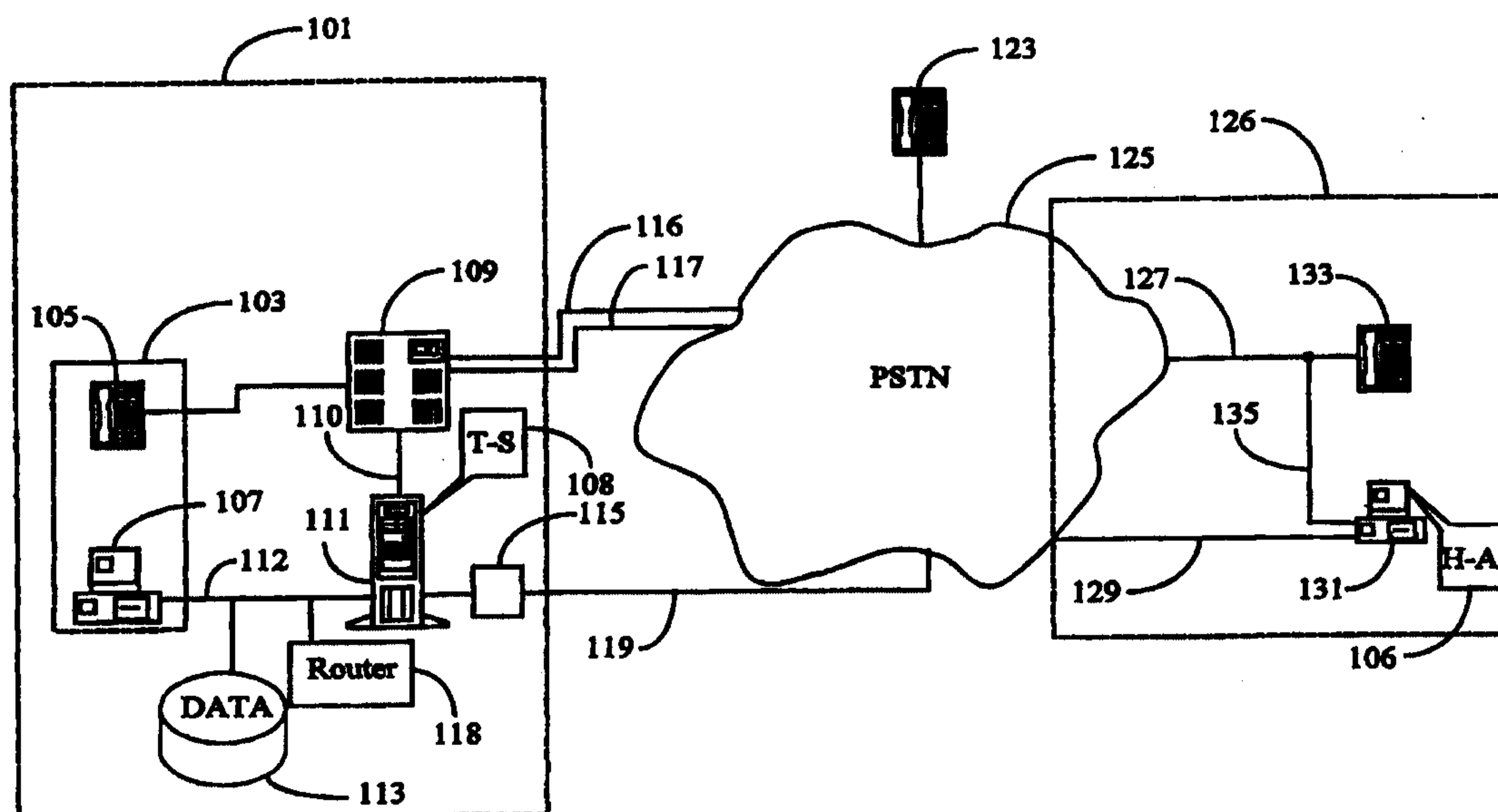
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## (54) Title: HOME AGENT CALL CENTER SYSTEM AND METHOD



## (57) Abstract

A call center system supports remote agent stations (126) through a network (125) by establishing a data link (119, 129) between a computer platform (131) at the remote agent station (126) and a computer-telephony integration (CTI) processor (111) connected to a telephony switch (109) at a call center (101) and switching incoming calls from the call center (101) to a telephone (133) at the remote agent station (126) while sending data pertaining to the calls via the data link (119, 129) to the computer platform (131) at the remote agent station (126) to be displayed.

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## HOME AGENT CALL CENTER SYSTEM AND METHOD

*by Inventors*5 *Oleg Bondarenko, Valery Issayev, Yuri Shtivelman, & Dan Kikinis***Field of the Invention**

10 The present invention pertains to telephony communications systems and has particular application to methods including software enabling a home agent operating away from an associated call center to operate with full call center functionality and resources.

**Background of the Invention**

15 Telephone call processing and switching systems are, at the time of the present patent application, relatively sophisticated, computerized systems, and development and introduction of new systems continues. Much information on the nature of such hardware and software is available in a number of publications  
20 accessible to the present inventors and to those with skill in the art in general. For this reason, much minute detail of known systems is not reproduced here, as to do so would obscure the facts of the invention.

25 At the time of filing the present patent application there continues to be remarkable growth in telephone-based information systems. Recently emerging examples are telemarketing operations and technical support operations, among many others, which have grown apace with development and marketing of, for example,

30

sophisticated computer equipment. In some cases organizations develop and maintain their own telephony operations with purchased or leased equipment, and in many other cases, companies are outsourcing such operations to firms that specialize in such services.

5           In a call center, a relatively large number of agents handle telephone communication with callers. Each agent is typically assigned to a telephone connected to a central switch, which is in turn connected to a public-switched telephone network (PSTN), well-known in the art. The central switch may be one of several types, such as Automatic Call Distributor (ACD), Private Branch Exchange  
10 (PBX), or a Central Office switch equipped with Centrex ACD service.

          An organization having one or more call centers for serving customers typically provides one or more telephone numbers to the public or to their customer base, or both, that may be used to reach the call center service. The number or numbers may be published on product packaging, in advertisements, in user manuals,  
15 in computerized help files, and in any other convenient way. In most cases, when the numbers provided are toll-free numbers, a Service Control Point (SCP) directs the routing of the to one or another of associated call centers.

          Routing of calls may be on several levels. Initial routing may be done at SCPs and further routing may be accomplished at individual call centers. Intermediate  
20 routers may also be used. As described above, a call center typically involves a central switch, which may have, for example, an Automatic Call Distributor (ACD) and may be a Private Branch Exchange (PBX), or a Centrex service. The central switch is typically connected to the public-switched telephone network (PSTN). Agents, trained to handle customer service, operate telephones connected to the  
25 central switch.

          If the call center consists of just a switch and connected telephone stations, the routing that can be done is very limited. Switches, such as PBXs and PABXs and the like, although increasingly computerized, are limited in the range of computer processes that may be performed. For this reason additional computer capability in  
30 the art has been added for such switches by connecting computers adapted to monitor switch activity and to control switch functions. The processes of incorporating

computer enhancement to telephone switches is known in the art as Computer Telephony Integration (CTI). The connected computers execute CTI applications provided to enhance switch and call center functions.

5 In a call center, agent stations having telephones connected to the switch may be equipped also with computers including video displays, such as PCs, so agents operating such stations may have access to stored data as well as being linked to incoming callers by a telephone connection. Such stations may be interconnected in a local area network (LAN) by any one of several known network protocols, and there may be other servers connected to the LAN as well, such a file servers and the like. In  
10 CTI enhanced systems the LAN may also connect to the CTI processor.

When a call arrives at a call center, whether or not the call has been pre-processed at a SCP, typically at least the telephone number of the caller is made available to the receiving switch at the call center by a telephone carrier. This service is available by most PSTNs as Automatic Number Identification (ANI) information  
15 in one of several formats. If the call center is computer-enhanced (CTI) the phone number of the calling party may be used to access additional information from a database at a server on the network that connects the agent workstations. In this manner information pertinent to a call may be provided to an agent.

Even with present levels of CTI there are still problems in operating such call  
20 centers, or a system of such call centers. There are waiting queues with which to contend, for example, and long waits may be experienced by some callers, while other agents may be available who could handle callers stuck in queues. Other difficulties accrue, for example, when there are hardware or software degradations or failures or overloads in one or more parts of a system. Still other problems are due to known  
25 latency in conventional equipment. There are many other problems, and it is well recognized in the art, and by the general public who have accessed such call centers, that there is much room for improvement in the entire concept and operation of such call center systems. It is to these problems, pertaining to efficient, effective, timely, and cost-effective service to customers (patrons) of call center systems that aspects  
30 and embodiments of the present invention detailed below are directed.

Corporations are faced with a challenge to provide consistent levels of customer service in an environment where call volumes are constantly changing. For example, a public response to a TV advertising campaign might require staffing levels far above average. Corporations are in constant need to flexibly change the number of agents based on variable volumes of calls.

One possible solution considered by providers of call center services is a home agent solution, wherein agents may be remotely based from the call center. This concept involves setting up home-based agents with the necessary equipment and lines so as to allow the agent to operate remotely but still retain access to call center functions such as call routing functions, customer information system (CIS) resources, conferencing options, and the like, that are provided to agents operating at the call center.

A problem with this remote agent, or home agent, concept prior to the time of the present invention is that all known implementations of home agent systems require dedicated hardware such as leased lines for both voice and data, special add-on cards enabling communication protocols to be converted, and special proprietary telephones made to operate remotely over such dedicated lines and circuits. Therefore, the expense of enabling multiple agents to function remotely can be very significant, and even much higher than the normal operating costs of expanding or upgrading the call center to accommodate more agents.

What is clearly needed is a method and apparatus whereby a company can station agents in remote locations other than at the call center, such as in their own homes, and still provide full call center functionality and CIS accessibility, without the requirement for added dedicated and proprietary equipment and special leased lines. A solution such as this would reduce company costs and increase call center efficiency and flexibility.

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### Summary of the Invention

According to one aspect of the present invention there is provided a call center system including a call center having a switching apparatus connected to a Public Switched Telephone Network (PSTN), the switching apparatus enhanced by a Computer Telephony Integration (CTI) processor executing a CTI application, and including at least one Home Agent station remote from the call center and accessible through the PSTN, the Home Agent station having a telephone and a personal computer (PC) with separate voice and data channels in the PSTN for the telephone for voice communication and the PC for data communication, wherein the telephone has an integration link with the PC in a manner that the PC may monitor and control telephone functions, a method comprising steps of: (a) accomplishing an initial log-in for the Home Agent station, enabling thereby use of a minimum log-in procedure for subsequent calls until log-off; (b) receiving a voice call at the call center for service; (c) determining by the CTI processor that the call should go to the Home Agent station; (d) placing the voice call to the Home Agent station by dialing through the PSTN for the switching apparatus at the call center; (e) in response to receiving the voice call at the Home Agent station, dialing the call center from the Home Agent station to establish a data channel using the minimum log-in procedure; and (f) monitoring progress of the voice call and providing call center CTI services to the Home Agent station through the data channel, the PC and the integration link.

According to a further aspect of the invention, there is provided a call center system comprising: a switching apparatus connected to a Public Switched Telephone Network (PSTN); a Computer Telephony Integration (CTI) processor coupled to the switching apparatus and executing a CTI application; and at least one Home Agent station remote from the call center and accessible through the PSTN, the Home Agent station having a telephone and a personal computer (PC) with separate voice and data channels in the PSTN for the telephone for voice communication and

0 the PC for data communication, the telephone having an integration link with the PC  
in a manner that the PC may monitor and control telephone functions; wherein upon  
an initial log-in for the Home Agent station, a minimum log-in procedure is  
established until log-off, and upon receiving a voice call at the switching apparatus  
and the CTI processor determining that the call should go to the Home Agent station,  
5 the CTI processor causes the switching apparatus to dial and connect the voice call to  
the Home Agent station, and after the call is answered at the Home Agent station the  
Home Agent station dials the call center establishing a data channel using the  
minimum log-in procedure, and wherein the CTI processor monitors progress of the  
voice call and provides call center CTI services to the Home Agent station through the  
10 data channel, the PC and the integration link.

All call center services available to locally-connected agents are made  
available also to remote agents by compatible software executing on the CTI-  
processor and on the computer platform at the remote agent stations. Plural stations  
15 will typically be supported from a single CTI-enhanced call center. Advantages of the  
invention are realized through processes of maintaining the data connection  
continuously between the remote station and the call center, or, if the connection is to  
be broken between calls, establishing procedures described in full detail below, for  
establishing and using the data connection very quickly as it is needed with each new  
20 call switched to a remote agent station. The invention in its several embodiments  
provides remote agent capability without necessity for leased lines, dedicated  
hardware, and proprietary telephones and the like. Through the teachings of the  
invention remote agent stations may established at any location where a telephone and  
a computer station is available, with two lines so voice calls and data may both be  
25 supported. The two lines may be two POTS lines or the two channels of an ISDN  
connection.

### **Brief Description of the Drawing Figures**

Fig. 1 is an overview of a call center and connected home agent  
30 according to an embodiment of the present invention.



### Description of the Preferred Embodiments

Fig. 1 is an overview of a call center and connected home agent system according to an embodiment of the present invention. In this embodiment a functioning call center 101 and at least one remote workstation 126 are each connected to a Public Switched Telephone Network (PSTN) 125. For purposes of convenient description station 126 may be considered to be in an agent's home, but this is not required. A client telephone 123 is shown connected to PSTN 125 as well, and represents many telephones available to persons who may use the services of the call center and an agent at either workstation 126 or at the call center.

Call center 101 in this embodiment comprises a telephony switch 109 that is connected typically to a number of agent workstations, such as agent workstation 103, each having a telephone 105 and a PC 107 having a video display unit (PC/VDU). There are also typically several to many such agent workstations in such a call center. Switch 109 in this embodiment is enhanced by a computer-telephony integration (CTI) processor 111 connected to the switch by a CTI link 110. Processor 111 and the PC/VDUs at agent workstations are connected on a local area network (LAN) 112. Also connected to the LAN within call center 101 is a file server 113 supporting a client database, and there may be other servers on the LAN as well.

It will be apparent to those with skill in the art that call center 101 may contain a large number of agent stations such as agent station 103 as well as multiple file servers, storage units and other equipment without departing from the spirit and scope of the invention. In this embodiment only one unit of each type at a call center is shown, and this minimum arrangement is deemed adequate to fully describe embodiments of the present invention. Similarly, only one home agent workstation is shown, although there may be many such stations in alternative embodiments of the invention.

A client typically contacts call center 101 using client telephone 123. An incoming call from a client is routed through PSTN 125 and into telephony switch 109 via trunk 116 in this embodiment. Telephony switch 109 may be of the form of a Private Branch Exchange (PBX) or Automatic Call Distributor (ACD), or any other type of telephony switch known in the art and suitable for call center utilization.

In a preferred embodiment of the present invention agent station 126 and call center 101 have a dual connection. One of the two connections is a telephone link between the home agent's telephone 131 and telephony switch 109 at the call center. In various embodiments of the invention a plurality of outgoing call ports are reserved for home agent connection. One such line 117 is illustrated in Fig. 1 for the telephone link from switch 109 to home agent station 126, which is completed from the PSTN via line 127 to the home agent's station.. The other connection is a data connection between the home agent's PC and data services at the call center. In a preferred embodiment this link is made via a telephony link 129 from home agent station 126 via the PSTN to CTI processor 111 at the call center. Lines 127 and 129 at the home agent station may be in one instance two POTS lines (plain old telephony service), or the B channels of an ISDN connection (2B+D).

In the embodiment shown, CTI processor 111 executes CTI functionality by virtue of a proprietary routine 108 known to the inventors as T-Server. When the call from phone 123 enters PBX 109, a proprietary routine 118 known as a Router is alerted. Router 118 can be a separate unit connected to PBX 109 through processor 111 as shown in Fig. 1, or may be implemented in other ways. Router 118 selects the best available agent to answer the call. If the Home Agent is selected, then the call is transferred to telephone 133 through trunk 117 and line 127, and associated data is transferred to the home agent's workstation 131 through the data link 119 and 129. Remote agent functionality in conjunction with T-Server is provided at each remote agent station by executing code routines 106 known to the inventor as Home Agent. In this embodiment it is necessary that the T-Server be compatible with Home Agent for the system to function properly. In other embodiments the software applications may execute on different platforms. Given the teaching herein, it will be apparent to those with skill in the art that this is but one example of many implementations that may be made.

There are a variety of ways a data link may be established and maintained for Home Agent functionality. In the embodiment illustrated by Fig. 1, for example, and the data connection is by a dial-up telephony connection to a modem bank 115 at the CTI processor. The modem bank in this embodiment is adapted to serve as many home agents as there are dedicated ports for home agent connection.

There are a number of other ways the data link may be established and maintained. One is by an Internet connection made by the home agent PC through an Internet Service Provider (ISP) dial up, wherein the CTI server is adapted as an Internet-connected server. NT and UNIX dial-ups are other options. The detailed nature of the data connection is not basic to the invention, and many options will be apparent to those with skill in the art.

The way the data connection is made and used relative to calls switched to home agents is important to the invention. In one embodiment the home agent logs in in a manner similar to a login procedure for an agent at a call center. That is, the home agent, at the beginning of a session, dials up the data connection, which initiates a log-in procedure, which after completion connects the home agent's PC/VDU to CTI processor 111, and indirectly to LAN 112 at the call center, and provides for the home agent the CIS service and functions available to all other agents associated with the call center. In this preferred embodiment the data connection, once made, is kept active until the home agent logs off.

In this preferred embodiment, wherein the data connection is kept active, when a call arrives at telephony switch 109 from a client at a telephone represented by telephone 123, and it is determined (for whatever reason) that the call is to go to home agent 126, router 118 directs the switch to transfer the call to home agent station 126. An outgoing call is placed to telephone 133 at the home agent's station, and at the same time data arriving with the call or accessed from database 113 using information derived from the call is transmitted to PC/VDU 131 at the home agent's station via the always-open data connection. In this manner a screen pop with client information and a script for the agent may be displayed on the VDU of PC/VDU 131 at the agent's station by the time the call arrives, or even before the call arrives. When the telephone connection is made the call from the client is switched to telephone 133.

The home agent station has a virtual SoftPhone connection 135 from the telephone to the PC/VDU. This connectivity and functionality is implemented in one embodiment by a TAPI-compliant modem or bridge at the PC/VDU to which voice line 127 interfaces as well as to telephone 133. This connection enables the Home Agent application 106 to have all telephony controls over phone 133. It ensures that the application behaves in same manner whether the agent is located at home, or at the

Call Center. It is not strictly required that there be a physical telephone and a physical connection as shown in Fig. 1, however. There are, in alternative embodiments, a number of ways that the SoftPhone connection may be implemented. There are, for example, commercially available applications wherein a telephone may be simulated  
5 by software in the PC. There are other implementations as well. What is important is that the SoftPhone is enabled to do outbound dialing for both telephone 133 and data line 129 (modem-connected), and provides other functions as well, such as voice recording, and caller ID.

In an alternative embodiment it is not necessary that the data connection be  
10 constantly maintained. In this embodiment, at the call center end of the data connection a full log-in is accomplished when an agent first dials up and logs in from a home agent station, then a simplified log-in is enabled requiring essentially only that the agent station be verified from calling party identification data when a subsequent dial up is made from the agent station during a normal shift time, until the agent  
15 formally logs off. In this embodiment, when a call is switched to a home agent, the arriving call at the home agent station from the call center triggers the modified dial up, establishing the dial up data connection more quickly than could be done by a more formal log in. . In the minimum log-in embodiment the TAPI interface recognizes an incoming call and automatically dials up the data connection, which, by  
20 virtue of the minimum log-in may be established quickly, so data may be provided to the home agent without creating undue delay.

In yet another embodiment unique capability is provided at the call center end of the data link, providing functionality, once an agent has formally logged in, for the  
25 call center to dial the agent's PC and establish the data connection. In this case no further log in or verification is needed, and each time a call is switched to the home agent's station, the call center re-establishes the data connection and provides the data for the agent at the agent's PC/VDU. This implementation is nearly as fast as keeping the data link always open, allowing the data and telephone connection to be done as  
30 quickly as the voice call is accomplished. In this embodiment circuitry 115 has dialing capability controlled by T-Server 108.

The scope of preprogrammed criteria used to determine whether or not a home agent will be utilized can be unlimitedly broad without departing from the spirit and scope of the present invention. For example, in one embodiment, a home agent may be used only at a certain time of day. In another embodiment, the home agent may be brought in to play after a certain level of incoming calls is detected. In still another embodiment, the home agent may be responsible for answering specific types of requests, and so on.

It will be apparent to one with skill in the art that varying degrees of software integration can be present wherein different commands and functions are utilized without departing from the spirit and scope of the present invention. For example, this instant embodiment describes a control routine used with a typical incoming call to a call center that is predetermined to be transferred to a home agent for disposition. In another embodiment, a different control routine will be used where the incoming call is transferred to a home agent and then linked with a third party (conference calling). Routines for different features available to the call center and subsequently to the home agent such as call forwarding, call waiting, transferring to another call center, and so on will be tailored for each instance. Furthermore, it is intended by the inventor that the present invention supports alternative media types such as Web conferencing, Video Desktop conferencing, and E-mail. With an appropriate ISDN connection and software, all known types of media are supported. It will also be apparent to one with skill in the art that more than one agent can be active and communicating on more than one connected device at the home agents location without departing from the spirit and scope of the present invention. For example, multipoint ISDN configurations are known in the art and allow several users to share the same lines. In another embodiment, Internet connectivity could be maintained by the virtual home agent and the call center whereby an incoming call results from a clickable icon or link embedded in a Web page. In still another embodiment wireless forms of communication may be utilized such as satellite-based communication, and wireless LAN. It is known to the inventor that systems utilizing wireless forms of communication can be linked to a PSTN network and to the Internet to allow for various network schemes and added multimedia capabilities. The present Invention is limited only by the claims that follow.

**CLAIMS:**

1. In a call center system including a call center having a switching apparatus connected to a Public Switched Telephone Network (PSTN), the switching apparatus enhanced by a Computer Telephony Integration (CTI) processor executing a CTI application, and including at least one Home Agent station remote from the call center and accessible through the PSTN, the Home Agent station having a telephone and a personal computer (PC) with separate voice and data channels in the PSTN for the telephone for voice communication and the PC for data communication, wherein the telephone has an integration link with the PC in a manner that the PC may monitor and control telephone functions, a method comprising steps of:

(a) accomplishing an initial log-in for the Home Agent station, enabling thereby use of a minimum log-in procedure for subsequent calls until log-off;

(b) receiving a voice call at the call center for service;

(c) determining by the CTI processor that the call should go to the Home Agent station;

(d) placing the voice call to the Home Agent station by dialing through the PSTN from the switching apparatus at the call center;

(e) in response to receiving the voice call at the Home Agent station, dialing the call center from the Home Agent station to establish a data channel using the minimum log-in procedure; and

(f) monitoring progress of the voice call and providing call center CTI services to the Home Agent station through the data channel, the PC and the integration link.

2. The method of claim 1 wherein the CTI processor at the call center is adapted as an

Internet server, and in step (a) the data link is established by the computer platform at the remote agent station dialing up an Internet service provider and establishing an Internet connection to the CTI processor.

3. A call center system comprising:

a switching apparatus connected to a Public Switched Telephone Network (PSTN);

a Computer Telephony Integration (CTI) processor coupled to the switching apparatus and executing a CTI application; and

at least one Home Agent station remote from the call center and accessible through the PSTN, the Home Agent station having a telephone and a personal computer (PC) with separate voice and data channels in the PSTN for the telephone for voice communication and the PC for data communication, the telephone having an integration link with the PC in a manner that the PC may monitor and control telephone functions;

wherein upon an initial log-in for the Home Agent station, a minimum log-in procedure is established until log-off, and upon receiving a voice call at the switching apparatus and the CTI processor determining that the call should go to the Home Agent station, the CTI processor causes the switching apparatus to dial and connect the voice call to the Home Agent station, and after the call is answered at the Home Agent station the Home Agent station dials the call center establishing a data channel using the minimum log-in procedure, and wherein the CTI processor monitors progress of the voice call and provides call center CTI services to the Home Agent station through the data channel, the PC and the integration link.

4. The method of claim 3 wherein the CTI processor at the call center is adapted as an Internet server, and in step (a) the data link is established by the computer platform at

the remote agent station dialing up an Internet service provider and establishing an Internet connection to the CTI processor.



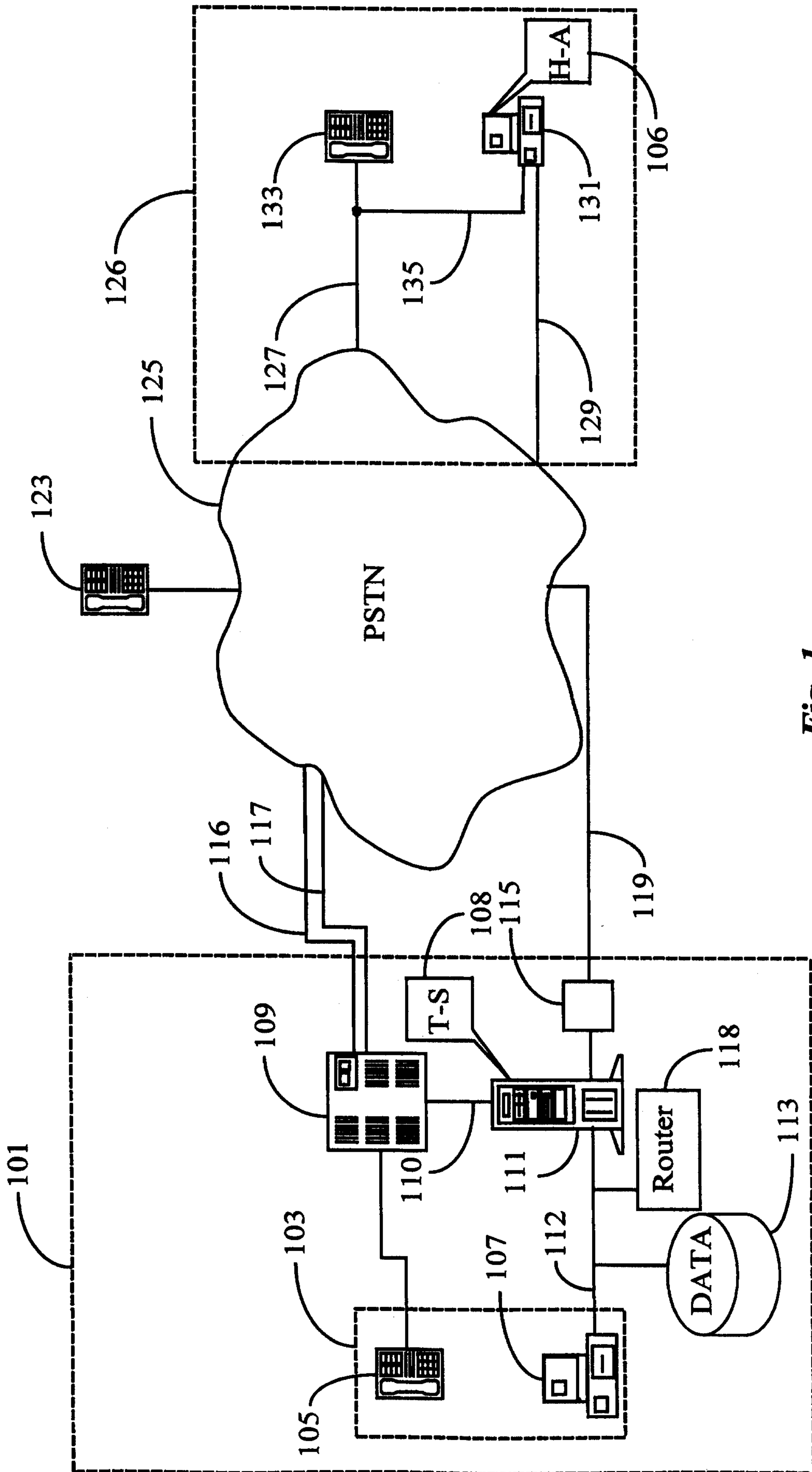


Fig. 1

