How Can Virtual Assistants Increase the Productivity of Mobile Business People?

Introduction

As business people, we’ve become very dependent on our desktop environment to manage our day-to-day activities. Everyday is filled with tasks such as making and answering telephone calls, reading and replying to e-mails, and managing appointments, task lists and phone books to stay in contact with our customers and associates. But what happens when we are on the road traveling or visiting customers? What about all that time wasted stuck in traffic, or waiting at an airport?

We rely so much on our desktop environments, that it became extremely important for us to have remote access to our messages, appointments and address books when we are away from our office. And what happens when important customers call while we are on the road?

We use a variety of small mobile devices and solutions such as Blackberry and find-me follow-me services to stay in touch with our business and customers, but while these tools solve some of our problems, they fail to do the job when we are driving because they are all visual and offer limited display and data entry capabilities. The fact is, while devices are getting smaller, our hands and fingers are still the same size and our sight diminishes as we age.

In this white paper, we will explain why mobile business people need speech-enabled virtual assistants and how these solutions fill the gap left by traditional mobility solutions. If you are an executive or salesperson looking for a mobility solution to conduct your business while on the road, this white paper will tell you what to expect from a true virtual assistant solution.

What Is A Virtual Assistant?

The best way to describe a virtual assistant is to look at what a real personal assistant does.

- It answers your customer calls and forwards them to you everywhere you go based on your instructions and preferences. If you answer, it tells you who’s calling and gives you the option to take the call, transfer it to a colleague or send it to your voice mail. If it can’t reach you, it takes a message and sends you a notification.

- When you call, it recognizes and takes your spoken commands to read your emails and appointments to you over the phone, helps you schedule meetings, calls contacts and dials phone numbers for you, etc. Your assistant can also set your status and call forwarding when you are in-meeting or out-of-office.

Virtual assistants are a new breed of business communications and mobility solutions where speech, wireless and Internet get together to help us increase our productivity, improve customer satisfaction and give us unprecedented mobility. Virtual assistants are entering the mobility market to fill the need for business productivity while driving.
What Should A Virtual Assistant Do For You?

It should route your calls based on your schedule and preferences. The multiplicity of telephone numbers, e-mail addresses and communication devices are forcing our customers and business associates to remember a lot of cryptic information to reach us. Not only that, but they also have to remember our time schedule to call us at the right place at the right time. Why do we put this burden on our important customers? Can’t we give one number that reaches us everywhere? Personal assistants do this. Simply say if and where you want to be reached at different times and days, and let your assistant do the rest. It should greet your callers by their name, and in their language, before transferring them to you or to your voice mail based on your instructions. And every time your phone rings, it tells you who is calling so you can make the decision to take the call or send it to voice mail.

It should give you access to critical business information when you need it. When you are driving, you should be able to access more than just voice mail, because your mail also includes e-mails, meeting requests, task assignments and faxes. So why settle for a voice mail or unified messaging when you can have a personal assistant that can understand your spoken commands to give you interactive voice access to all your business information.

It should also be aware of your trips and vacation. You should be able to inform your personal assistant about your travel and vacation plans and how you want your calls to be handled during these periods. That’s all you have to do to make sure that your callers are properly greeted during your absence. Your Virtual Assistant should always know where you are and how you want your calls to be handled.

Can the virtual assistant change your call forwarding while you are on the road? Most modern IP-PBXs in the market today offer the Find-Me/Follow-Me feature to enable users to be reached on different numbers – office, mobile, home, etc. Some support schedule-based call forwarding allowing users to program the PBX to route their incoming calls to different numbers based on the date and time of call. A good personal assistant must offer this type of smart call forwarding and more. It should allow you to change your status and call forwarding using speech commands by phone. Isn’t that what a real personal assistant would do for you if you had to leave your office in a hurry? You simply call and let your assistant know where you are, for how long and how you want your calls to be treated. It should be that simple.
**The assistant should call your contacts for you.** True personal assistants know all about your business contacts to call them, send e-mails or invite them to meetings. Anytime you need to call or send an urgent e-mail to someone while driving or waiting at an airport, you should simply call your assistant and say something like “Call John Smith on his mobile phone” or “Send a message to John Smith”. Or you may just need the address of the customer you are driving to visit. Virtual assistants are expected to help you in these situations. Just say your command.

**The assistant should access your calendar to let you review and schedule meetings with your voice.** Meetings and appointments are an important part of our day-to-day business activities. We continuously consult our agenda to check our availability for an important meeting. But what if you need to schedule a meeting from your car right after a phone conversation with a customer? Like executives who have personal secretaries, you should be able to ask your assistant to lookup your calendar and book the meeting with the customer. The meeting request should be sent to the participants as if you did it from your desk.

**The assistant should be able to call back people who called you.** You should expect your assistant to tell you about the date and time of any call you made or received. How often did we need to return missed customer calls or to re-contact people who communicated with us recently? True virtual assistants keep a log of all your incoming and outgoing calls not only to help you manage your business relationships, but also for customer billing and project costing.

**The assistant should call back e-mail senders.** Since virtual assistants sit between telephony systems and messaging servers, you should expect them to provide you with new benefits resulting from this integration. When you bring telephony together with user contacts, a new set of functions should become available to people on the road. The virtual assistant should be able to offer functions such as call back e-mail and voice mail senders, forward messages to your colleagues and contacts, send new voice messages as e-mails to any contact in your address book, etc.

**The assistant should access all your voice, fax and e-mail messages at once.** Most new IP-PBX systems offer unified messaging where voice messages and faxes are stored in your Inbox with your e-mails. This enables you to access all your messages in one mailbox from your desktop, web mail or phone. As a mobile person, you spend a lot of time out of the office driving or visiting customers, and that’s when you need to access your messages and process them. Make sure that the virtual assistant you choose enables you to access and process your e-mails, faxes and voice messages using speech commands. Simply speak to archive, delete, forward or reply to any message.

**Your ROI should be measurable by productivity increase.** Saving time and generating more revenues are the key benefits expected from an efficient virtual assistant. You can calculate your ROI either on the cost savings side, the increase in revenues, or both. According to a Yankee group study, mobile people gain 20% to 30% more productivity when they use unified communications. The cost of these services varies between 1% and 2% of the user’s salary.
Why Speech is Better than Text?

We can talk while driving, but not read and type e-mails. When the first PDAs made their entry into the market, mobile people used to take big risks in order to make some business calls while driving. The knees holding the steering wheel, the PDA in one hand, and the cell phone in the other. That’s how dangerous it was to get some productive work done during the time wasted in traffic. Wouldn’t it be safer to simply speak to call your customers, process your mail and manage your calendar? Most wireless phones have Bluetooth to work with earphones or hands-free in luxury cars. A speech-enabled virtual assistant will help you conduct your business while keeping your hands on the wheel and your eyes on the road.

Speech is the natural communication language. Why limit ourselves to the language of text and buttons when we can use speech? It is obvious that speech carries more information than text. It conveys such aspects as humor, tone and volume variations that can’t be read in an e-mail. How many misunderstandings were caused by e-mails written in one mood but read in another? Industry leaders are publicly predicting that speech will become the primary medium for our electronic communications.

Can the Assistant Work for the Enterprise?

The assistant should answer your company calls and act as a virtual receptionist. It is important that the solution you choose for your mobile executives and sales people can also act as a speech-enabled receptionist for your company as a whole. Callers should be able to simply say the name of the person or service they want to reach, and the receptionist transfers them using the applicable call-forwarding rule. In addition, it should allow you to personalize the menu options and directory for your company. Make sure that the virtual assistant is available as a hosted service to give your enterprise the professionalism and first class image of a big business at a small price.

Do you have to purchase expensive speech technologies to get the services of a virtual assistant? Like many people, you may recognize the benefits of having a speech-enabled virtual assistant to help your mobile executives and salespeople, but when you look at the costs associated with such a project, you cannot justify the investment. Indeed, the cost of speech technologies, the computing power they require and the costs of keeping up with new developments are still prohibitive for small and medium enterprises. Would it be possible to use this technology as a hosted service? More and more companies prefer hosted services to in-house solutions. They pay low subscription fees and save the cost of purchasing and maintaining expensive technology.

How about moving from hosted to in-house solution? The number of users and the volume of communications may force your enterprise to move from hosted to in-house solution. What happens then? Will users get the same type of service with the same visual and speech user interfaces? It is important to avoid the heavy costs of retraining users on a different enterprise solution. The ideal virtual assistant solution should give you the exact same service whether the service is hosted or installed in your premises. This gives you the option to try before you buy.

Can the assistant interact with your existing telephony and IT systems? When choosing a virtual assistant solution, make sure that it is compatible with your existing PBX and mail system. It should smoothly communicate with your
phone system whether it is a legacy TDM PBX, a new IP-PBX or a hosted IP-Centrex. It should also be able to access and interact with your current messaging system whether it is in-house or hosted. If the solution supports POP3, IMAP and HTTP-based messaging protocols, it will work with the majority of mail systems. This is important not only if your enterprise uses different mail servers, but also to protect your investment if you change vendors in the future.

**Does the solution affect the reliability of your PBX?** It must not be disruptive and should not affect the reliability or quality of your telephone service in any way. It should be installed as an adjunct solution to your existing telecom system so that even if it is turned off, it does not affect your basic telephone calls.

**How about serving remote corporate offices?** The selected assistant must support VoIP telephony to be able to seamlessly interconnect remote offices with your headquarters without disrupting your existing network infrastructure. This is important if you need direct voice communications between your offices at the lowest costs.

**Is the assistant ready for worldwide roaming?** If your mobile people travel around the world, then you should look for a virtual assistant that can meet the challenge of worldwide virtual roaming using internet telephony.

**Do you need special devices to access your business information?** Most people have been using special mobile devices such as Blackberry and Palm to have access to their e-mails and other business information. A large number of technology-savvy executives, salespeople, lawyers and financial advisors have adopted these productivity tools because they help them handle their business mail while away from the office. Some like these devices because they can use them discreetly if they get bored in meetings and theaters! But many complain about the usability of these devices: the small screen makes e-mails hard to read, and the tiny keyboard makes answers hard to type. Did you notice that most replies originating from these devices are very short, often limited to “yes”, “no” and “maybe”. As speech technology matures, more and more people are turning to voice solutions to access their mail while in real time. There is no special device to purchase or carry. Any phone whether mobile or not can be used.

**Can the virtual assistant be used to provide custom mobility services?** Real personal assistants can book airline tickets, make restaurant reservations, check the stock market, etc. The ideal solution should offer the option to build and integrate new custom speech applications for the specific needs of mobile people. The platform should enable these custom apps to share the same speech and telecom resources resulting in cost savings and efficient use of assets.

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**A QUICK LOOK AT THE EXCENDIA SOLUTION**

**Excendia is a speech-enabled virtual assistant.**

Excendia enables business people to use ordinary phones to conduct their business while on the road. Of course they can use a PC, a WAP-enabled phone or a PDA, but all these devices are visual and offer limited display and data entry capabilities. Excendia offers an interactive voice access to the mail and phone system from anywhere and at anytime. It is a new real-time business mobility solution unique for its simplicity and effectiveness.
Excendia is a speech-enabled middleware that uses direct access to your phone system and your messaging server to help you manage your day-to-day communications more efficiently. People using Excendia say it is like having an intelligent personal assistant working for you 24 hours a day, 7 days a week. It provides cost savings, improved business efficiencies, safe mobility and increased productivity in an enterprise-grade unified communications server.

**Here is how Excendia works**

The following diagram shows how Excendia can deliver personal assistant functions for mobile business people who need more safety and productivity on the road without disrupting their existing telephony and IT infrastructure.

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**Excendia Integration**

The Excendia Server uses an Internet link to your telephone system and your mail server to enable you to remotely control both of them by phone using speech. It makes the phone system more “intelligent”, and gives remote voice-access to business information, without disrupting either side.

**Excendia can be offered as a hosted service or as an in-house solution.**

For greater flexibility, Excendia can be used in a variety of configurations to meet your mobility needs and to fit into your business communications plans.

- It can be used as a hosted business mobility service. In this case, companies and individuals simply subscribe with a local service provider to use the service. All account management is done through an intuitive Web user interface.
- It can also be used as an in-house solution integrated with your existing telephony and IT infrastructure. This configuration is adequate for medium and large enterprises that need more control and more privacy.

**CONCLUSION**

Business is built on communications. Keeping in touch today requires an armada of devices and messaging systems, yet we still miss key phone calls and waste a lot of time checking an assortment of inboxes. A good virtual assistant should help us stop
this time-drain, enhance our mobile safety, improve customer response time, and eliminate phone tags.