

# CSG Custom Rules Engine

Set rules, save money. We'll help you create new efficiencies in your legacy platforms.

When your business serves a large population of customers, a single flaw in your billing process can be costly. You could be over- or undercharging customers, taking incorrect actions on their accounts, sending out unnecessary truck rolls and making other errors that damage your customer experience (CX) and hurt your bottom line.

Often, all you need to fix these flaws are well-placed business rules.

With the CSG Custom Rules Engine, you can create versatile business rules that help you get the most out of your existing platforms for billing, customer orders, technical support and other operations..

## What Is The Custom Rules Engine?

The Custom Rules Engine (CRE) is a system that streamlines a vast range of billing system functions based on business rules you create. It automates actions to be performed on a billing account, or prevents unwanted actions, under criteria you specify.

### The CRE is versatile

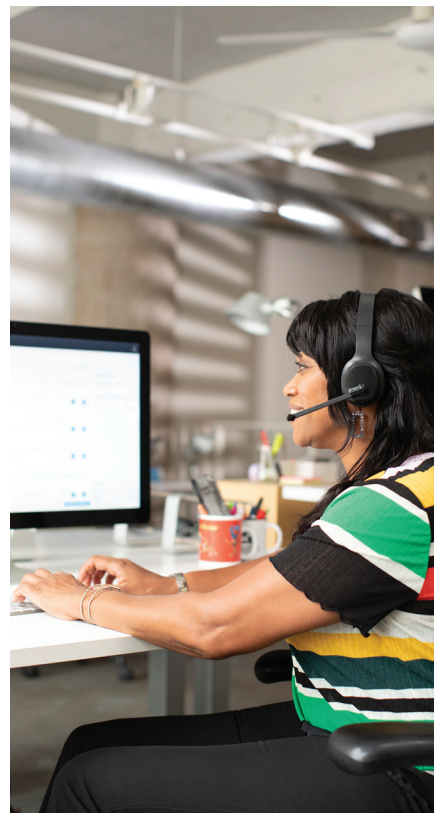
The CRE integrates with virtually any billing system, and its rules can be quickly reconfigured as your business conditions change.

### The rules are versatile

The same rule can standardize operations across both contact centers and brick-and-mortar locations. You can also apply different versions of the same rule for separate geographic regions or business divisions.

### The CRE is a problem-solving engine; our developers are problem solvers.

We work with you to identify solutions to process issues you have, and our developers code the rules to integrate them into your existing platform.



200  
MILLION+

BUSINESS RULES BEING  
EXECUTED EVERY MONTH

90,000+

CUSTOMER SERVICE  
REPRESENTATIVES ASSISTED  
EVERY DAY

CSG customers have implemented some especially useful custom rules, which we've broken down here into four categories:

- Simplify Order Entry.
- Customer Experience.
- Compliance.
- Reduce Truck Rolls.

Below you'll find a sampling of rules, the problems they help solve and the benefits customers reap from them in terms of CX and cost reduction.

### Simplify Order Entry

Are there functions in your billing system you want to automate for specific situations? Or actions you want to block under certain circumstances? The CRE enables you to create rules that streamline orders for your agents, preventing adverse actions and second-guessing that can cause customer friction and increase costs.

#### Box Revenue

On occasion, a customer might be inaccurately charged for the equipment they're currently renting: they might be using a cable box or router that is going uncharged on their account, or they're paying rental for equipment they don't have. Many companies correct discrepancies after an audit, but these corrections can increase customers' bills unexpectedly, driving calls to the contact center.

This rule contains logic that ensures that when the agent is servicing the customer account, the account has codes for each piece of equipment the agent sees on the equipment screen. If the information doesn't match, then the rule requires the agent to reconcile the information before they complete the order.

### THE CRE SAVINGS IMPACT

By using the Box Revenue rule, one CSG customer avoids over- and undercharging customers for rented equipment, saving an estimated **\$32,000 PER DAY**—nearly **\$1 MILLION PER MONTH**

### Customer Experience

You can implement rules through the CRE that make your agents' functions more efficient and accurate, improving CX in both your contact centers and brick-and-mortar locations.

#### Front Counter Solution

If you take payments from customers in person, your agents at those front-counter locations might have to key the transactions manually. The CRE can streamline various transactions—credit card, check and electronic funds transfer—by pulling payment information directly from the reader to fill out the payment forms.

You can also implement rules to automatically email customers customized receipts from those in-person payments—an eco-friendly alternative to producing print receipts by default.

### Compliance

Every business trains its customer care agents to adhere to company policy, industry regulations and other guidelines in serving its customers. But still it pays to have guardrails around your billing system that prevent costly errors. The CRE helps you customize those guardrails to fit your business and its changing obligations.

### Restarting Accounts

When a customer’s service is deactivated due to delinquency, there are certain situations where the business would prefer to forgive the customer’s bad debt and reactivate their service. But how do you standardize that decision-making among your agents?

Using the CRE, you can create a rule that blocks agents from restarting a written-off customer account if it meets specific criteria, such as if it reaches a certain balance due or has aged a certain number of months. You can also implement a rule to forgive the debt on accounts that meet specific criteria; it adds an adjustment to the account on the back end, allowing the agent to enter the restart without having to make the adjustment manually. With key rules applied, the CRE can help your agents take more consistent actions on customer accounts in adverse standing, maximizing revenue.

### Reduce Truck Rolls

For the typical communications service provider (CSP), sending a field service technician to assist a customer costs the business an average of \$70 per truck roll. CSG customers have realized savings by preventing unnecessary truck rolls through various operations in their contact center.

### WiFi-Ready Automation

CSPs sometimes have situations where their end user is moving out of a residence, but the internet equipment should stay put. This is common when a homeowners’ association is the customer account; when an outgoing user deactivates the service, it is unnecessary for them to return the equipment or for field service to retrieve it.

In this or a similar situation, a rule can populate a reminder to the agent notifying them that the equipment shouldn’t be removed during disconnect, or the customer doesn’t need it installed to activate it.

#### THE CRE SAVINGS IMPACT

A CSG customer provides internet for about 11,300 locations where an association owns the account, and not the resident. The WiFi-Ready Automation rule prevents about one truck roll per location, per year when residents move.

**11,300 LOCATIONS**  
**X \$70 PER TRUCK ROLL**  
**\$800,000 SAVED PER YEAR**

The company also estimates an additional savings of nearly \$80,000 by containing calls to the contact center.

### What New Efficiencies Can The CRE Uncover For Your Business?

These are a few examples of the custom rules CSG customers are implementing in their billing systems to improve CX and reduce costs. But every business is different and can realize efficiencies in a multitude of functions across the enterprise.

What CX and revenue problems could the CRE solve for your business? Contact a CSG representative to learn more ways to create efficiencies in your workflow.