

## EnsemblePro Feature, Function, Benefit Guide

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### **AUTOMATIC OUTBOUND DIALING (AOD)**

**AUTOMATIC OUTBOUND DIALING PROVIDES TOOLS FOR PROACTIVE CUSTOMER CONTACT, INCLUDING PREDICTIVE AND PREVIEW DIALING, CAMPAIGN AND CALL LIST MANAGEMENT, AUTOMATED MESSAGING AND SCHEDULED RECALLS.**

This document is meant to serve as a technical guide for those users looking to identify the product features, understand their function and have the associated benefit defined.



| Features                                | Function   | Benefit  |
|---|--|--|
| <b>Automated Outbound Dialing (AOD)</b> | Provides tools for proactive customer contact, including predictive and preview dialing, campaign and call list management, automated messaging and scheduled recalls.   | Improved customer contact via automated dialing based on business rules and maximized agent productivity through call progress detection. Outbound IVR and text to speech applications increase contact efficiencies, provide customer personalization and self-service opportunities. |
| Manual Dialing                          | Agents can place manual outbound calls using the dial pad or by accessing the speed dial directory.  | Gives agents the flexibility to dial on their own.   |
| Power Dialing – Dial-to-Agent Ratio     | Outbound calls can be placed automatically by the system. The number of calls dialed is based on the predefined call-to-agent ratio.   | Allows the operation to gain efficiency by load balancing outbound calls.  |
| Preview Dialing                         | Agents can have the opportunity to preview an automated outbound call before it is dialed. Preview dialing allows the agent time to prepare for the call about to be placed, and is one of the methods available to ensure that an agent is available before a call is placed. | The agent has the ability to review the customer details and is better prepared to handle the call.  |
| Timed Preview                           | The amount of time that an automated call is previewed to an agent before being dialed is configurable by the contact center manager. Timed previews can range from 1 to 600 seconds.  | System automatically dials calls allowing supervisors to control pacing.   |
| Predictive Dialing                      | The system uses an algorithm to predict when an agent will become available to handle the next call and dials based on these assumptions.  | Increases the overall agent productivity by maximizing the number of calls placed and achieve low idles times. Increased contacts per hour leads to lower costs and greater revenue.   |
| Pacing Controls                         | The rate of dialing (pace) or number of outbound records dialed at a time can be controlled by numerous parameters in the system.  | Gives managers the flexibility to control the speed and effectiveness of the dialing campaign.   |
| Target Abandoned Percentage             | The contact center manager can provision the target abandoned rate for the campaign. In predictive mode, the system will adjust the number of calls dialed to adhere to the target abandoned rate setting.   | Maintain the appropriate service level while benefiting from the productivity gains of a predictive dialing campaign.  |
| Wait for Available Agent                | This setting controls the maximum amount of time (in seconds) that an outbound call in queue will wait for an agent before it is disconnected.   | Controls agent idle time to gain efficiency.   |
| Goal Service Length                     | This setting represents the target number of calls desired in queue at any point in time.  | Allows managers to achieve efficient load balancing.   |

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| Goal Service Time         | This setting represents the target amount of time a call should be held in queue. The Goal Service Time should be lower than the Wait for Available Agent setting.   | Allows managers to control the outbound queue for greater agent productivity.                                     |
| Goal Service Percentage   | This setting represents the percentage of time the goal service length and goal service time settings are expected to be upheld.   | Gives manager visibility into the status of calls.  |
| Within Goal Service Time  | This setting is calculated by multiplying the goal service percentage and goal service time fields.  | Gives managers visibility into the status of calls.   |
| Calls in Service          | This is used to approximate the number of active outbound calls in the service at any point in time.   | Gives manager visibility into the status of calls. Managers can make adjustments based on these types of metrics. |
| Agents Working in Service | This is used to approximate the number of active agents in the service at any point in time.   | A useful tool to calculate the dial-to-agent ratio.   |
| Call-to-Agent Ratio       | This setting is calculated by dividing the calls in service by the agents working in service fields. This is a non-binding target number that can be used in prioritization.   | Valuable metric for managing calls and agents.  |
| Wait Message              | The wait message is an audio message that can be played to customers while they are waiting to be connected to an agent. The wait message will be interrupted as soon as the agent on the outbound campaign becomes available.   | Reduces the chance of an abandoned call by communicating with the customer who is about to speak with an agent.   |
| Call Table Administration | Call records can be stored in a table for dialing and associated with an outbound service. Contact center managers can use the Director application to provision the outbound call tables.   | Gives managers greater control and flexibility in managing campaigns.   |
| Table Import              | Call tables can be imported into the system for the purpose of dialing. Only tables in a fixed width ASCII format or from an ODBC source can be imported. Additionally for ACSII formatted tables, each row must end with a carriage return (ASCII 13) and a line feed character (ASCII 10). | Gives managers the ability to load new numbers for services.  |
| Data Mapping Definitions  | Each field within the call table must be mapped with a field type and length. The data mapping allows the system to recognize each element within the call table. It also identifies whether null values are acceptable for a field and if the field is an index or a primary key.           | Definitions aid managers in developing call tables.   |

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| AMD Type Selection Per # | Each phone number within a call record can have its associated Answering Machine Detection type. The AMD type determines the algorithm that will be used to perform the call analysis. For example, a different AMD type can be selected for home numbers and business numbers. | Gives flexibility to having AMD turned on as the types can be changed based on type of locations being called.    |
| Header Inclusion         | Contact center managers can select whether the header will be included as part of the imported call table.  | Gives managers the ability to customize the import and export structure for call tables                           |
| Header Suppression       | Contact center managers can select whether a header in the ASCII data file will be excluded from the call table.  | Gives managers the ability to customize the import and export structure for call tables.                          |
| Trailer Inclusion        | Contact center managers can select whether a trailer in the ASCII data file will be included in the call table.   | Gives managers the ability to customize the import and export structure for call tables.                          |
| Trailer Suppression      | Contact center managers can select whether a trailer in the ASCII data file will be excluded from the call table.   | Gives managers the ability to customize the import and export structure for call tables.                          |
| Record Preview           | The data in the imported table can be previewed before being dialed.  | Enables supervisors to validate the call list that is about to be dialed. Reduces the risks of errors.            |
| Scheduled Import         | Call tables can be automatically imported according to a pre-set schedule. The schedule can be set for one day or for a set hour on a daily basis.  | Automation of the import task can be scheduled in the system allowing managers to focus on higher priority tasks. |
| Import from Text File    | The call records can be imported from a flat ASCII text file. A source directory must be provisioned in order for the system to know where the file will be located.  | Gives flexibility as to what type of files can be imported into the system.                                       |
| Import from ODBC Source  | The call data can be imported from an external ODBC data source into the system for dialing.  | Gives flexibility as to what type of files can be imported into the system.                                       |
| One Time Import Option   | The scheduled import can be set for a particular time during the day.   | Automation of the import task can be scheduled in the system allowing managers to focus on higher priority tasks. |
| Daily Imports            | A recurring daily schedule for the imports can be provisioned.  | Allows for full automation of recurring call table imports.   |
| Table Export             | Call tables with the results of the outbound campaign can be exported from the system to be used in an external database or application.  | Allows for Decision Support and analysis.   |
| Export to Text File      | The call table data can be exported to a flat text file.  | Gives flexibility as to how tables can be exported.   |
| Export to ODBC Source    | The call table data can be exported to an external ODBC data source.  | Gives flexibility as to how tables can be exported.   |

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| Scheduled Export                    | The exporting of the call table data can be scheduled to automate the upload process to an external data source.  | Automation of the export task can be scheduled in the system allowing managers to focus on higher priority tasks.  |
| Table Filters                       | A filter can be applied to a call table to select a subset of the records within the table to dial in a specific outbound campaign.   | Allows for flexibility within a call campaign to achieve more targeted outbound dialing.   |
| Record Range Selection              | Within the table filter, the range of records (e.g. 1-1000) can be selected for dialing.  | Gives flexibility as to how filters can be defined.  |
| Arithmetic Operations               | Arithmetic operations can be performed as part of the filter to determine which records will be dialed.   | Gives flexibility as to how filters can be defined.  |
| Boolean Operations                  | Boolean logic can be used as part of the filter to determine which records will be dialed.  | Gives flexibility as to how filters can be defined.  |
| Sorting                             | The call table can be sorted by the system before it is dialed.   | Gives managers greater control of dialed calls.  |
| Record Count                        | A count of the total records in the call table and total records filtered is provided.  | Allows managers to gain insight into call record statistics.   |
| SQL Statement View                  | A SQL statement view of the filter is provided for verification   | Provides a script view of the filter being applied. Enables advanced administrators to verify that they are selecting the right set of records to dial.  |
| Visual Filter                       | The filter applied to the call table can be designed in a standard window with point and click options.   | Allows managers to have easy access to the applied filter on the desktop.  |
| Filter Preview                      | The result of the filter (selected call records) can be previewed before dialing.   | Enables managers to validate the call list that is about to be dialed. Reduces the risks of errors.  |
| Table Deletion                      | Imported call tables in the system can be deleted to manage data storage in the system.   | Reduces the need for storage resources.  |
| Exclusion Management                | The system maintains an exclusion list that is filtered against before a number is dialed. The exclusion list enables contact center managers to control the numbers that can and cannot be dialed within a specific campaign. Exclusions are managed at a system-wide level or an application level. | Managers can control all numbers being dialed by creating filters for exclusion. By excluding records system-wide or by application, managers can help optimize the results of campaigns or applications. Allows companies to exclude customers that do not want to be called from the list. |
| Exclusion List Preview              | The supervisor can preview the call records in the exclusion list.  | Provides the ability to monitor call records.  |
| Exclusion by Social Security Number | Records can be added to the exclusion list with the Social Security Number acting as the baseline for the exclusion. If a call table contains a record with a Social Security Number matching that in the exclusion list, the record will not be dialed.  | Managers can control numbers being dialed by excluding defined customer Social Security Numbers. By excluding records system-wide or by application, managers can help optimize the results of a campaign or application.  |

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| Exclusion by Account Number                   | Records can be added to the exclusion list with the Account Number acting as the baseline for the exclusion. If a call table contains a record with an Account Number matching that in the exclusion list, the record will not be dialed.  | Managers can control numbers being dialed by excluding defined customer account numbers. By excluding records system-wide or by application, managers can help optimize the results of the campaign or application. |
| Exclusion by Phone Number                     | Records can be added to the exclusion list with the Phone Number acting as the baseline for the exclusion. If a call table contains a record with a Phone Number matching that in the exclusion list, the record will not be dialed.   | Managers can control numbers being dialed by excluding defined customer phone numbers. By excluding records system-wide or by application managers can help optimize the results of the campaign or application.    |
| Exclusion Expiration                          | Supervisors and agents can set an expiration period for the exclusion. The expiration allows the users to control numbers that cannot be dialed for a short time range (e.g. on the same day).   | Allows for the creation of temporary exclusion filters. By setting a time range, the manager does not have to start and stop exclusion filters.   |
| Exclusion Addition                            | Records can be individually added to the exclusion list with an exclusion criteria of Phone Number, Account Number or Social Security Number.  | Managers can exclude records on an ad-hoc basis allowing for optimized results.   |
| Exclusion List Export                         | The entire exclusion list can be exported to an external system. It is recommended that a customer periodically export the exclusion list to filter the call records before they are imported on the next day to the system.   | Allows an administrator to filter customers that want to be excluded from their main database.  |
| NANP Manager                                  | The North American Numbering Plan (NANP) provides a precise definition of the location of the phone number. The location is determined by the number's area code and exchange. NANP is used to determine the time zone associated with a number. This information is used to determine the appropriate time to contact a customer. NANP is available for North American phone numbers only. Internally, the Time Zone mapping option must be used. | Creates an efficient calling environment by mapping time zones to phone numbers ensuring that agents are calling numbers at appropriate times.  |
| View Area Codes and Exchanges                 | The contact center manager can view the area codes and exchanges that comprise the NANP table.   | Gives managers a view of time zone mapping.   |
| Add Custom NANP Entry                         | If new area codes and exchanges are available but are not reflected in the current NANP table, custom entries can be added to enable a system to map the time zones properly.  | Managers can proactively manage the addition of new area codes without having to wait for NANP tables to be updated.  |
| Daylight Savings Time Observance by Area Code | Contact center managers can define whether daylight savings is observed for each area code.  | Allows managers to control the call list based on daylight savings times.   |

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| NANP Table Download                            | The NANP table is updated on a periodic basis. Users can download the NANP table updates using the download manager in the Director application.   | Provides an efficient way to stay current with NANP changes.   |
| Time Zone Administration                       | Contact center managers can map the time zones for the international phone numbers to determine the appropriate time to call.  | Gives managers the flexibility to control time zones on an international basis.  |
| Time Zone Groups                               | The set of time zones used in a specific outbound campaign can be grouped for ease of use.   | Provides managers with an easy tool for greater efficiency in managing call tables.                                    |
| Time Zones by Area Code                        | The time zones can be mapped using available area codes in the call table.   | Enables managers to determine the time zone based on the area code of the caller.                                      |
| Time Zones by State                            | The time zones can be mapped using an available state field in the call table.   | Enables managers to determine the time zone based on the postal code of the caller.                                    |
| Time Zone by Postal Code                       | The time zone can be mapped using an available postal code in the call table.  | Provides managers with an easy tool for greater efficiency in managing call tables.                                    |
| Answering Machine Detection Options            | The system can perform advanced call analysis to determine if the call has been answered by an answering machine or a live voice.  | These options provide significant cost savings to outbound application campaigns by connecting callers to live voices. |
| Answering Machine                              | This is the standard answering machine detection algorithm used by the system. With the Digital Communications Processor (DCP), the detection rates range from 90-95%. With the Dialogic boards, the detection rates with this option range from 70-75%. | Significantly reduces contact center costs by connecting agents with live voices.                                      |
| Custom Answering Machine                       | This option is available only when Dialogic boards are used to perform the call analysis. It provides higher detection accuracy for Dialogic, delivering rates of 80-85%.  | Customization for a specific environment will deliver better detection accuracy.                                       |
| Business Detection                             | This option is used to detect answering machines when the number being dialed is a business number.  | For B2B applications it significantly reduces contact center costs by connecting agents with live voices.              |
| Positive Voice Detection                       | This option is used when any voice response is desired. It does not distinguish from a live voice and an answering machine. It does however filter SIT tones, busy signals, pagers, modems, etc.   | Gives the manager additional flexibility to set the system options that will best achieve desired objectives.          |
| Connect – AMD Off                              | This option is used to turn off answering machine detection. Any form of connect will be passed to the agent.  | Especially useful for FTC compliance.  |
| Answering Machine Detection Options per Number | A different type of answering machine detection can be selected for each number in a call record. This allows the user to select the optimum detection algorithm for the number dialed.  | Gives the manager additional flexibility to set the system options that will best achieve desired objectives.          |

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| Multi Number Dialing – Up to six Numbers | A record within a call table can contain up to six numbers. These numbers can be designated a value (e.g. home, business, cell, etc.)  | Gives agents a better chance of reaching desired individuals.  |
| Dial Order Selection                     | The contact center manager can provision the order in which the phone numbers in a call record are dialed (i.e. Home first, Business second, Cell third etc.). If the call attempt is unsuccessful for the first number, the system will dial the second number associated with the call record.                                     | Gives agents a better chance of reaching desired individuals.  |
| External ODBC Database Dialing           | The call records used by the system for the purpose of dialing can reside in an external database table. The external table allows the user to bypass the import and export process. The system will attach to the external table, dial the call records, and store the call outcomes (dispositions) directly in the external table. | Managers have flexibility in loading call records. By alleviating the need for import/export, the manager is not limited to only calling imported call tables. |
| Automated Dialing Feed                   | Call records can be fed (trickled) into the dialer from an external application. Using the AOD Feed API, call records will be periodically trickled into the dialer. The call dispositions are passed back to the external application through the API.  | Managers have flexibility in loading call records. By alleviating the need for import/export, the manager is not limited to only calling imported call tables. |
| Disposition Administration               | Contact center managers can provision the types of expected call outcomes (dispositions) that they want to track.  | Gives the manager options for tracking call outcomes.  |
| Dispositions Classes                     | A disposition class is a term that refers to an overall category under which dispositions are created. For example, a disposition class called “Do Not Call” can have individual dispositions: “Not Interested”, “Irate Customer”, etc.  | Provides for a more detailed reporting on the outcome of the call.   |
| User Disposition Codes                   | A disposition code is a combination of characters (a maximum of three) used to describe the outcome of a call. There are two types of disposition codes. The first is an EnsemblePro™ type, which is tied to a system disposition (e.g. DNA – no answer). The next is a User type, which is created by contact center managers.      | This feature allows for further customization of the system to meet the company’s specific business requirements.  |
| Disposition Routing Attributes           | Routing attributes enable you to select an action to be performed with the disposition. For example, if the dialer reaches a pager number, you can select Send Digits and send a page to that number.  | By creating customized attributes, contact center managers can provision for additional actions thereby maximizing their investment in the call.               |
| Hang-up Routing Attribute                | The hang-up routing attribute lets the system know to terminate the call once the disposition is found.  | Allows agents to immediately take another call and reduces costs by not keeping the call engaged.  |

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| Play Message Routing Attribute                                     | This routing attribute indicates to the system to play a select message to the caller as a result of the disposition entered.                                     | Allows managers to tailor messages that will be played to the customer towards the end of the call.   |
| Reroute to Multi Media Manager (M <sup>3</sup> ) Routing Attribute | This routing attribute indicates to the system to reroute the caller to an M <sup>3</sup> script as a result of the dispositions entered.                         | By creating customized attributes, contact center managers can provision for additional actions thereby maximizing their investment in the call.  |
| Redial Routing Attribute   | This routing attribute directs the system to redial the number based on the disposition entered.  | By creating customized attributes contact center managers can provision for additional actions, thereby maximizing their investment in the call.  |
| Send Digits Routing Attribute                                      | This routing attribute is typically used once a pager disposition is identified. It indicates to the system to send digits to the pager.                          | By creating customized attributes contact center managers can provision for additional actions thereby maximizing their investment in the call.   |
| Send Fax Routing Attribute   | This routing attribute indicates to the system to send a fax as a result of the disposition entered.  | By creating customized attributes contact center managers can provision for additional actions thereby maximizing their investment in the call.   |
| Transfer Routing Attribute   | This routing attribute indicates to the system to transfer the call as a result of the disposition entered.   | By creating customized attributes contact center managers can provision for additional actions thereby maximizing their investment in the call.   |
| Dial Next Number Routing Attribute                                 | This routing attribute indicates to the system to dial the next number following the disposition entered.   | By creating customized attributes contact center managers can provision for additional actions thereby maximizing their investment in the call.   |
| Disposition Report Attributes                                      | The disposition report attributes are used to categorize the dispositions for reporting purposes.   | Numerous disposition attributes give managers access to detailed reporting capabilities.  |
| Abandon  | The abandon disposition attribute is used to report on the calls that were abandoned by the customer.   | Managers can track the number of times the dialed party was actually reached.   |
| Contact  | The contact disposition attribute is used to report on the calls where the customers were successfully contacted.   | Managers gain critical insight into the call disposition for reporting and analytical purposes.   |
| Follow-Up  | The follow-up disposition attribute is used to report on calls when the customer needs to be called back.   | Managers can track the number of pending items awaiting follow-up.  |
| Call Outcome Categories  | Call outcome categories are used for real-time statistics, routing and reporting. They represent the various classifications of the result of the call.           | By analyzing call operations in real-time, managers can monitor and make adjustments to applications and call routing. Call outcome categories can be viewed in real-time allowing managers to monitor the success of a campaign. |
| Success  | Dispositions can be categorized with a success call outcome. This can be used to indicate that the call resulted in a sale, satisfactory problem resolution, etc. | Managers can track the number of successful dispositions within a particular campaign.  |

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| Refusal                            | Dispositions can be categorized with a failed call outcome. This can be used to indicate that the customer was not interested.   | Managers can track the number of customer refusals within a particular campaign.  |
| Callback                           | Dispositions can be categorized with a callback outcome. This can be used to indicate that the customer requested a scheduled callback.  | Managers gain critical insight into the call outcome for reporting and analytical purposes.   |
| Exclusion                          | Dispositions can be categorized with an exclusion outcome. This can be used to indicate customers that want to be added to the “Do Not Call” list.   | Records can be managed to meet FTC/FCC compliance requirements.   |
| Scheduled Callback to Service      | Callback requests from customers can be scheduled by the agent to be delivered to any agent available in the outbound service at the callback time.  | Efficiently empowers agents by allowing them to automatically schedule callbacks with any available agent.  |
| Scheduled Callback to Agent        | Callback requests from customers can be scheduled to be delivered to the same agent.   | Empowers the agent to schedule callbacks to him/herself allowing them to complete the service.  |
| Blending                           | Agents can belong to inbound and outbound voice, chat, email, and workflow services concurrently. The system will deliver the appropriate contacts to the agents across these channels.  | Minimizes idle time by moving agents to various campaigns. Agents can be moved from inbound to outbound which helps to reduce costs by maximizing agent productivity. |
| Static Priority Routing            | Each service can be assigned a static priority number (0-10). In the event that multiple services are trying to access an agent at the same time, the static priority is used to determine which service the agent will be assigned to. The lower the priority number, the higher the priority.  | Gives the control of routing calls directly to the manager.   |
| Dynamic Priority Routing           | A service call can be assigned a dynamic priority template to compensate for the cases where another service competing for the same agent has an equal static priority. The Dynamic Priority Template is an 11x10 matrix of parameters and weights. Each parameter (Absolute Longest Wait, Relative Wait, Time to Goal Service Time, Absolute # of Calls in Queue, Relative # of Calls in Queue, Absolute # of Calls, Relative # of Calls, Service Level, Relative Resource Group Utilization, Affinity, and Call-To-Agent Ratio) can be assigned a weight from 1 to 10. The system will compare the total weighting of each service to determine which service the agent will be assigned to. | By giving managers the ability to set priorities, higher priority calls can be made before lower priority calls.  |
| Multiple Outbound Services Support | Agents can belong to multiple outbound services at the same time. The initial service flag and service flow configuration will determine which outbound service the agent will be active in.   | Allow companies to manage multiple outbound applications at the same time.  |

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| Initial Outbound Service Selection      | The initial service flag lets the system know which of the outbound campaigns agents will belong to when they log in.   | Agents can log-on and begin working immediately. Saves the time of having to direct the agent to a specific service.  |
| Service Flow                            | Agents can automatically move (flow) from one outbound service to another as the numbers in the initial service are depleted. Service Flow allows supervisors to maintain agent utilization across multiple outbound campaigns during the day.  | Contact centers gain efficiency by moving agents across various services within the system. Agent utilization can be evened out with less peaks and valleys.            |
| Dynamic Scheduling of Outbound Services | An outbound service does not have to be manually started or stopped; it automatically adheres to the schedule provisioned. At the defined service start time, it becomes active. At stop time, it allow calls in queue and active calls to be completed and either reroutes or plays a message to callers that dial in after the provisioned stop time. | By not having to manually begin and end services, managers can focus on higher priority tasks.  |
| Least Cost Routing                      | Various trunks can be allocated for outbound dialing in a resource group. The trunks can be connected to various carriers with differing rates (\$/min). Least cost routing ensures that the system is using the lowest cost trunk available when placing outbound calls.   | Cost savings benefit that maximizes various calling rate structures. Companies can minimize the long distance costs by routing calls over the least expensive circuits. |

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