

# Using **E-Mail Response Management** to Improve **Customer Service** and Achieve **Competitive Advantage**



## Background

Increasingly, your customers are turning to your Web site to locate information on your company's products and services, to seek support, and to conduct purchasing transactions and your volume of incoming e-mail is growing accordingly. The challenge lies in deploying an effective strategy for enabling your contact-center staff to rapidly and efficiently respond, and to turn every e-mail inquiry into an opportunity to strengthen and deepen your customer relationships.

According to the Harvard Business Review, a company in the United States can expect to churn half of its customer base every five years. Significantly, the Yankee Group reports that two-thirds of this turnover is the direct result of poor customer service. It follows, then, that retaining your valued customers means providing them with unsurpassed, personalized service they simply can't get from your competition. This emphasis on customer loyalty and retention becomes even more compelling when you consider that it can cost up to ten times more to attract and secure a new customer than it does to keep one you already have.

Today, meeting customer expectations for personalized service means accommodating individual preferences for multimedia contact options.

An effective e-mail response management (ERM) system is a critical component of this multimedia approach to customer contact. According to the Pelorus Group, 42 percent of top-ranked Web sites either took longer than five days to respond to customer e-mail or never responded at all. Addressing this critical challenge can create both opportunity and competitive differentiation for a business committed to optimizing its e-mail response strategy.

A basic ERM system must analyze incoming messages, route messages to agents, send automatic responses when appropriate, supply response tools, and track messages accurately. However, turning e-mail response management into a competitive advantage for your business requires more. Specifically, your ERM system must:

- Ensure timely and relevant responses to customers
- Provide an extensible platform that integrates with other customer-support and service applications
- Streamline your support organization and processes
- Scale with your needs

This white paper describes Cisco E-Mail Manager—the ERM component of the horizontal, open Cisco customer contact platform—and how it addresses these strategic requirements for an ERM system.



## Ensuring Timely and Relevant Responses

**The Challenge** Your customers increasingly prefer e-mail over other communication mediums for many reasons. They appreciate that they can send messages at their convenience, unburdened by business hours and time zones. After sending a message, customers can then go about their business while waiting for a response, instead of spending an unpredictable amount of time navigating a telephone system or idly waiting while on hold. Finally, customers can store e-mail for easy reference; they don't have to rely on memory or hastily written notes of what a telephone agent said.

Though e-mail offers customers ease and efficiency, they expect the same quality support, if not better, than they expect from telephone contacts. They demand that the assistance they get through e-mail is timely, specific to their needs, and consistent. An immediate response that is relevant to a customer's inquiry sends the message that your company cares about service and wants to meet and exceed expectations. Furthermore, a response that is aware of and uses knowledge of a customer's previous contacts, whether by e-mail, Web collaboration, or telephone, demonstrates a loyalty that will be returned. Needless to say, delayed, unhelpful, or inconsistent e-mail responses can only drive away existing and potential customers.

As your volume of e-mail continues to increase, the challenge to provide customers with accurate and timely information grows. You need an ERM platform that can ensure that customers receive the best and quickest responses possible.

**How Cisco E-Mail Manager Meets the Challenge** Cisco E-Mail Manager provides this total solution by enabling you to send timely, relevant, and personalized responses to messages from customers, leading to their increased satisfaction and loyalty. Cisco E-Mail Manager accomplishes this through four stages of message processing: system rules, personal and skill group distribution rules, message queues, and automatic escalation.

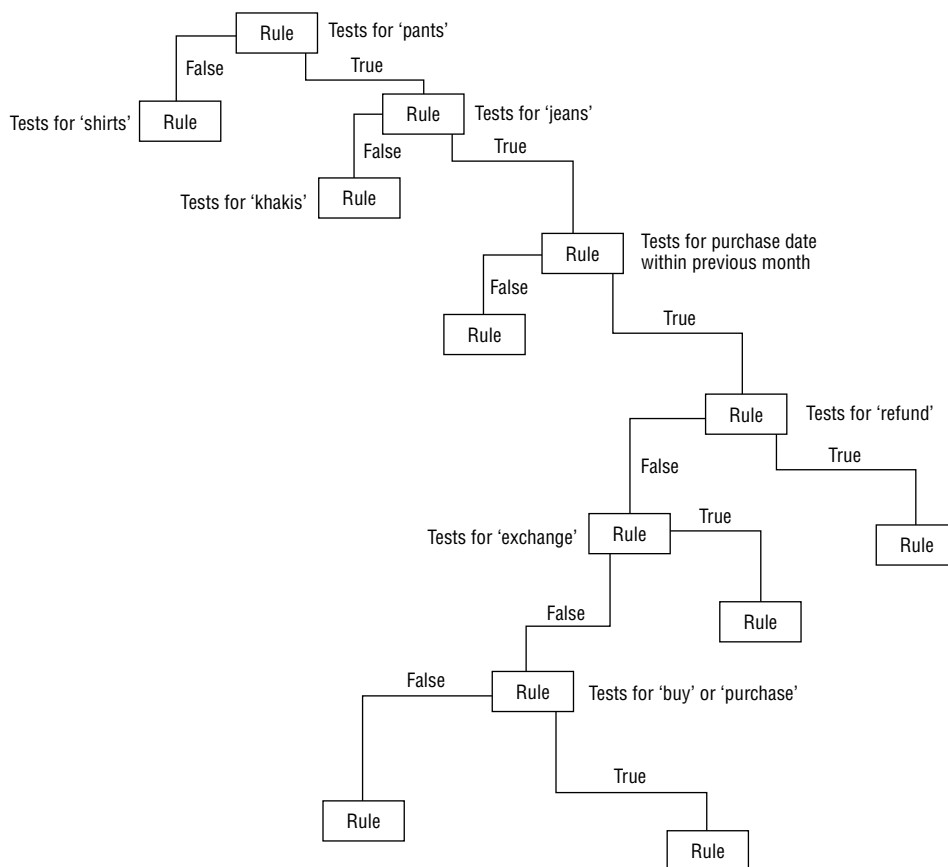
### System Rules

The heart of Cisco E-Mail Manager is a system of customizable rules that test the content of messages and take appropriate actions. You can define rules to test for the time and date a message was received, for text strings anywhere in the message, and for other variables you define. Based on the results of those tests, rules can do many things, including automatically sending responses. For example, the rules can determine that a potential customer is asking about your products and prices, and can automatically send a response with an attached catalog. Because the rules recognize a request for standard information, the potential customer receives an answer quickly, instead of having to wait for an agent to read and respond to the request. Rules can also, based on the results of tests you define, assign a message to a group of agents with a particular skill, associate categories with the message, suggest appropriate responses, and change the priority of the message.

The Cisco E-Mail Manager rule system is unique for its hierarchical, branching logic. This logic allows for an unlimited number of tests and actions on messages, enabling you to send the most detailed and personalized responses possible, as well as to categorize messages for highly detailed trend analysis. While other e-mail management systems use a limited, flat logic approach wherein message processing stops the first time a test on a message is positive, Cisco E-Mail Manager can continue message processing after a message tests positive, to narrow down the purpose of the message and to identify the optimal response. For example, when other ERM systems detect the word "pants" in a message, processing stops and the defined actions are taken. Cisco E-Mail Manager, however, can perform additional tests to determine the type and style of the pants, when they were purchased, and if the customer wants to get a refund, to exchange the item, or to buy more of the same, as shown in Figure 1.



**Figure 1** Hierarchical, Branching Rules Logic



There is no practical limit to the detailed processing rules can perform. As a result, the response, whether sent automatically or by an agent, is more tailored to the customer's needs.

### Personal Distribution Rules

After the system rules have completed processing of a message, the message is typically assigned to an agent's or skill group's queue for further processing. Each agent and group has a personal distribution rule (PDR) that executes as soon as a message is assigned to it.

PDRs can take many actions to improve your customers' satisfaction. For example, a PDR can send notification to an agent that a message has been assigned to his queue; for an agent who is not always logged in to Cisco E-Mail Manager, this notification can improve response time. A PDR can also send automatic responses from the agent's or skill group's personal template library, further tailoring the information your customers receive. For example, when the system rules assign a message to the group "Returns," the group's PDR can automatically send a response reiterating the return policy and stating that the message is presently being reviewed by a member of the Returns department. As a result, the customer is reassured that the message was received and is being acted upon by the appropriate people.

A PDR can also take different actions based on the date and time of day. This can be useful when an agent is on vacation, in which case the PDR can reassign the message to ensure a timely response, or when special company policies are in place during a specific time period. To continue the preceding example, if your company has a different return policy for the week following a holiday sale, the “Returns” group’s PDR can detect messages received during this timeframe and send a different automatic response.

Another distinctive feature of Cisco E-Mail Manager that is implemented through an agent’s PDR is called MailTrack. When MailTrack is enabled, each message assigned to the agent is forwarded to the agent’s external e-mail address, along with the priority, notes, categories, and relevant response templates associated with the message. This feature can be particularly useful for agents who for any reason do not log in to the Cisco E-Mail Manager Web interface. Using his or her standard, client-side e-mail application, the agent can compose a response and send it back to Cisco E-Mail Manager, which automatically routes the response to the customer. While agents using MailTrack can respond to messages using an everyday e-mail application, Cisco E-Mail Manager still processes and tracks all their communication with customers. MailTrack, therefore, enables Cisco E-Mail Manager to perform as the message-processing platform while enabling the company to utilize an existing e-mail client application.

### The Queue

After a PDR executes, agents read the messages and respond accordingly. The administrator can determine if an agent “picks” messages to respond to, or if messages are “pushed” to the agent. When agents pick messages, they view a queue and manually select messages to work with. To help agents select messages in the most appropriate order, the queue includes visual indications of the priority of each message and the date it was received. When messages are pushed, agents do not choose messages; agents are automatically given the most important message to work with, based on the priority of the message and the length of time it has been waiting in queue for a response.

Besides viewing the priority and the date of the message, agents can also view a history of messages received from the customer, as well as any notes attached to the message by the system rules or by other agents. Easy access to this information helps ensure that responses sent to the customer from your company are informed and consistent.

Agents can also use predefined response templates to save time when responding to customers. In many cases, the system rules may suggest one or more relevant templates for the agent to use. For example, a rule can detect the word “catalogue” in a message and suggest that an agent use a template with an attached .pdf file of your company’s catalogue. Suggested templates are listed on screen for the agent to insert into the response in one quick step. An agent can also search all public templates to find an appropriate response. Moreover, managers can create templates for agents’ use when setting up the system, and agents can save their responses as templates to easily reuse the same text. In this way, a team can develop and expand a template library over time so that responses for most messages are just a click away, helping agents reduce the time spent researching and writing responses.

Finally, when an agent does not know how to respond to a particular message, he or she can easily reassign and escalate it to another agent or to a manager.

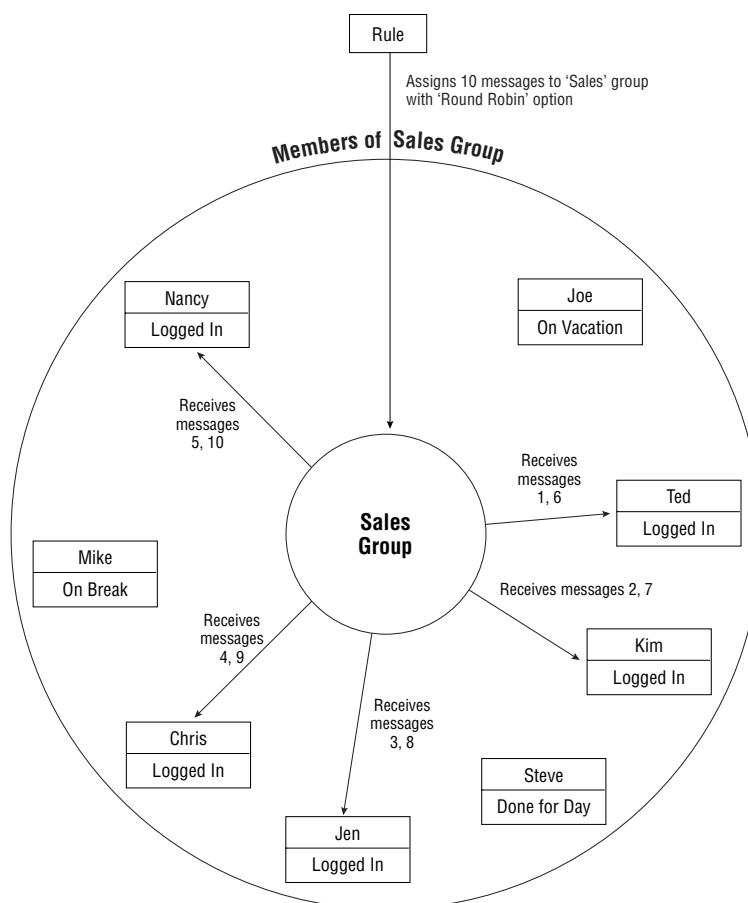


## Automatic Escalation

At times, perhaps during a sale or before a holiday, your company may receive such a large volume of messages that some agents cannot respond to messages as quickly as they arrive. As a result, your company risks not meeting its service-level standards, as well as losing customers' loyalty as they wait for information.

Cisco E-Mail Manager helps you solve this problem in many ways. First it enables you to avoid flooding any one agent with messages through a feature called "round robinning." When you define a rule to assign certain messages to a skill group, you can choose to round robin the message. When you choose this option, Cisco E-Mail Manager determines which members of the group are currently logged on, and then assigns messages to those agents, as shown in Figure 2.

**Figure 2** Round Robin

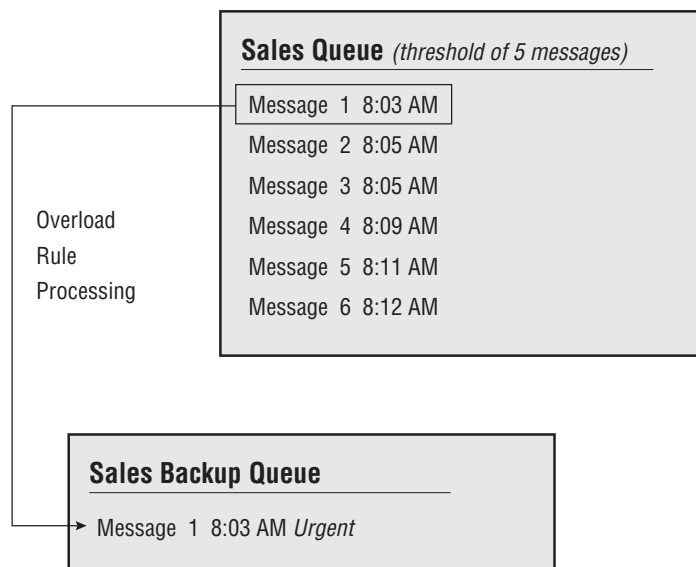


The system keeps track of how many messages have been assigned to each skill group member in this way and round robinns messages equally among agents, so that no one agent receives a disproportionate share of the group's messages.

When an agent or skill group is still unable to keep up with the number of messages assigned to its queue, Cisco E-Mail Manager helps you avoid delays through automatic escalation settings that you can customize to maintain your service-level standards. Through automatic escalation, you can ensure that no single agent or group is assigned more than a specific number of messages, and that no message waits for a response longer than a time period you specify.

If an agent or group queue contains too many messages, the older messages in the queue are automatically processed by a different set of rules called “overload rules.” Overload rules can perform the same types of tests and actions as the main system rules that processed the message when it arrived. In this situation, you may want the overload rules to assign messages to a group whose job it is to help others when the volume of messages increases, as shown in Figure 3.

**Figure 3** Overload Rules



Likewise, when a message is not responded to within the required time period, the message is automatically processed by another set of rules called “overdue rules,” which can also perform all types of tests and actions. For these messages, you may choose to have the overdue rules send an automatic response ensuring the customer that the message is being attended to, then raise the priority of the message and assign it to a manager’s queue.

### Providing an Extensible Platform

**The Challenge** However efficient an ERM system is at enabling agents to send timely and relevant responses, it must be more than a standalone application. Instead, an ERM system should be a platform through which you can integrate other business applications and processes to provide a complete customer-care solution. In other words, an ERM system must work with other systems to contribute to each customer’s optimal experience with your company.

Two primary integration points for an ERM system are your contact center and your customer relationship management (CRM) application.

Though your customers are increasingly using e-mail to contact your company, there are times when they still prefer to pick up the telephone and call. When your ERM system is integrated with your contact center, agents that are common to and knowledgeable of both systems can provide consistent information to customers, and managers can get a complete picture of customer contacts. By integrating your ERM system with your contact center, you can avoid customer frustration caused by disconnected and inconsistent contacts, and instead deliver seamless responses regardless of how customers choose to contact your company.



Taking customer care one step further, your CRM application contains a large volume of data about each customer, including contact information, past purchases, and preferences in your product line. When this data is easily accessible to agents who are responding to e-mail messages, those agents can compose even more customized and personal responses. In return, your customers appreciate that your company understands their needs, and are grateful for not having to reiterate information that they know your company already has.

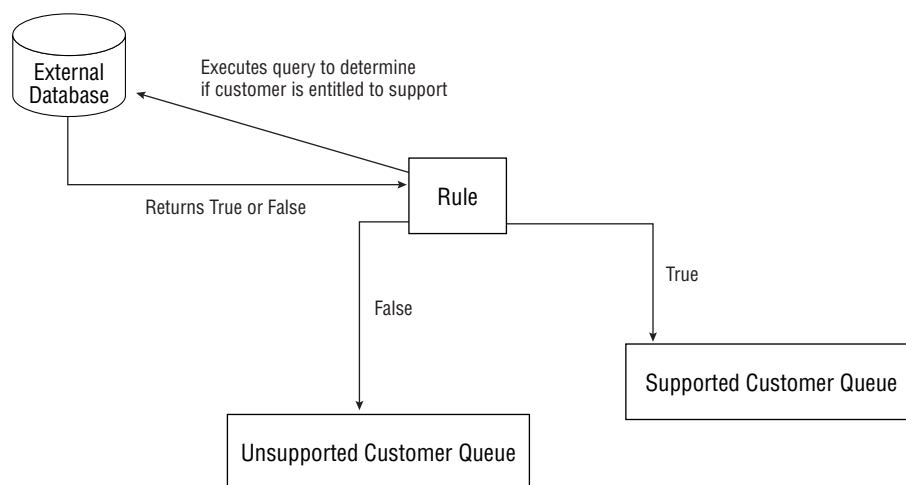
**How Cisco E-Mail Manager Meets the Challenge** Cisco E-Mail Manager provides a total solution for integrating with contact centers and CRM applications.

For contact centers, Cisco E-Mail Manager is an important element of the horizontal, open Cisco platform for customer contact which integrates intelligent contact management, Web collaboration, and e-mail response management with the strength of Cisco IP telephony networking solutions. This integrated platform enables you to manage multiple IP and Public Switched Telephone Network (PSTN) channels in an integrated fashion to provide a seamless and unified customer experience across media.

In addition, Cisco E-Mail Manager has a rich set of application programming interfaces (APIs) that can be used for integrating data from a CRM application. One example of how the Cisco E-Mail Manager platform can be extended to work with a CRM application is through “dynamic templates,” which incorporate data from an external database to customize a response for a specific customer. For example, you can define a single dynamic template to incorporate a customer’s full name, address, and most recent purchases. Each time the dynamic template is used in a response, Cisco E-Mail Manager queries the external database, using the e-mail address the original message was sent from to retrieve data for that customer. That data is automatically incorporated into the appropriate section of the response, with no action required of the agent.

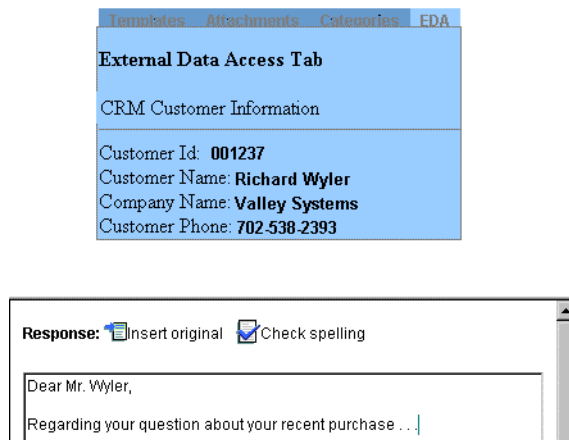
Dynamic templates are just one example of how Cisco E-Mail Manager integrates with CRM applications. The platform supports a wide and extensible range of integrated solutions. To demonstrate its capabilities, Cisco E-Mail Manager is delivered with two easy-to-demonstrate examples of how you might extend the platform to incorporate data from your CRM application. The first example shows how messages can be intelligently routed based on CRM application data. In this scenario, a rule executes a query on an external database to determine whether or not the customer sending the message has paid for and is entitled to full technical support. Based on the results of the query, the rule routes the message to the appropriate queue, as shown in Figure 4.

**Figure 4** CRM Integration



The second example demonstrates how an agent can view information on the customer who sent the message. In this example, the screen that agents use to respond to messages is customized to show CRM application data. The portion of the screen that contains this data is shown in Figure 5.

**Figure 5** Agent Screen



Each time the response screen is opened, a query is automatically executed on an external database. The customized screen then automatically shows data on the customer who sent the message. The information and context this data provides helps the agent deliver optimal service.

These examples demonstrate just two ways you can extend the Cisco E-Mail Manager platform to utilize your existing customer-care systems. Other common requirements that the platform supports include integration with an agent's complete customer-care desktop, and the sending and receiving of events between Cisco E-Mail Manager and other applications. You can easily customize and extend these capabilities to suit your business needs.

### **Streamlining Your Support Organization**

**The Challenge** So far, this document has focused on how Cisco E-Mail Manager can effectively enhance your company's customer service and support. Almost as important, however, is how an ERM system facilitates your company's internal operations. Specifically, the platform must make it easy for administrators, managers, and agents to complete their work as efficiently as possible. An ERM system that does not streamline all users' tasks puts your company at risk of losing the time-savings for which it was intended.

Administrators must be able to configure the system easily. Typical administration tasks include installing the server and configuring the database, setting up instances to receive messages from and send replies to Internet e-mail addresses, and configuring the rules that will process messages. The system should not require the administrator to know or learn unfamiliar, arcane, or proprietary technologies. Rather, it should be compatible with common, industry-standard systems.

Managers must be able to define and support agents quickly and in an efficient, easy manner. Just as importantly, managers must be able to monitor what agents are doing and make adjustments in real time to agents' assignments in order to effectively process the volume and type of incoming messages. Managers also must be able to track message activity over different periods of time from different perspectives. As is the case for administrators, if these tasks require managers to learn difficult and unfamiliar technologies, some of the time your company would otherwise have saved from the system may be lost.

Finally, agents must be able to respond to messages as efficiently and easily as possible. This means that the interface for doing so must be simple and straightforward, and require minimal training and ramp-up time. This is especially true for companies that hire seasonal and temporary agents.



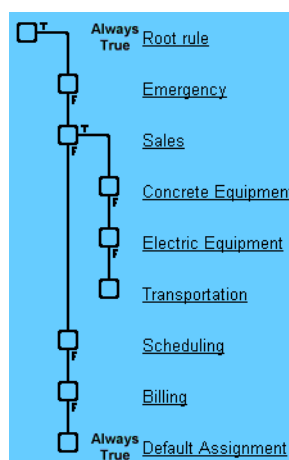
**How Cisco E-Mail Manager Meets the Challenge** Cisco E-Mail Manager is designed to facilitate the work of administrators, managers, and agents. Through its use of common technology and its easy-to-use and efficient features, Cisco E-Mail Manager lets your employees spend most of their time servicing your customers, instead of the system itself.

Installing Cisco E-Mail Manager on a server is a simple, quick process. The installation program includes a graphical tool for connecting the Cisco software to an industry-standard Oracle or Microsoft SQL Server (Structured Query Language) database. When a custom configuration is required, Cisco Professional Services is available to help. Because users access Cisco E-Mail Manager through a standard Web browser, no desktop applications beyond the browser are required. This eliminates the need for time-consuming installations and updates to multiple computers throughout your organization.

After the installation, the administrator can easily configure Cisco E-Mail Manager to receive and send messages. By filling out a few screens of information through a Web browser, the administrator can connect Cisco E-Mail Manager to industry-standard Post Office Protocol (POP) 3 mailboxes, from which to receive messages, and to a Simple Mail Transfer Protocol (SMTP) server, through which to send messages. Changing these settings or adding additional POP3 mailboxes is easy and can be done at any time.

Administrators define individual rules and place them in a logical processing order in a graphical environment, in which it is easy to define the tests and actions of each message. Linking rules together for detailed message processing is a one-step activity. Administrators can view the complete set of rules in their logical processing order in one graphical display. An example of a rule tree, as viewed in Cisco E-Mail Manager, is shown in Figure 6.

**Figure 6** RuleTree




Furthermore, administrators can use a testing tool, through which they can enter hypothetical messages and immediately view how they are processed by the rules.

Cisco E-Mail Manager allows managers to efficiently define agents and their privileges, and to track their work. Access privileges are controlled by roles, with which agents are associated. Therefore, a manager can define a set of access privileges once for a role (or use a predefined role) and associate that role with multiple agents who have similar jobs and access needs. New agents can also be created in bulk, reducing to one step an otherwise large task. Managers can also use a graphical tool to move agents in and out of groups at any time, in order to respond to changing message volume.

Managers can access rich information about agent and system activity. Cisco E-Mail Manager contains screens for managers that show the current state of agents and queues, including message counts and the number of overdue messages. Figure 7 shows an example of the screen that gives the status of all agents' queues:

**Figure 7** Agent Queues

Queue	Number Active	Incoming Today	Outgoing Today	Longest Waiting	Average Age	Number Overdue
<a href="#">Mark</a>	3	1	1	1 day 01:11:21	05:12:32	0
<a href="#">tharrisx</a>	6	4	3	1 day 02:21:43	04:41:21	0
<a href="#">unassigned</a>	12	11	9	2 days 06:34:12	1 day 21:51:53	0
<a href="#">wkenrich</a>	9	4	4	1 day 03:34:21	08:45:22	0
<a href="#">yehens</a>	4	15	11	2 days 04:56:32	1 day 00:45:22	0
<a href="#">yichen</a>	 17	11	1	3 days 00:05:53	3 days 00:05:33	16
	<b>Total Active</b>	<b>Incoming Today</b>	<b>Outgoing Today</b>	<b>Longest Waiting</b>	<b>Average Age</b>	<b>Total Overdue</b>
	51	46	29	3 days 00:05:53	1 day 18:07:23	16

Continuously updated, these screens give managers a constant view of system activity as well as valuable insight into customer needs. Managers can also generate many standard reports on different aspects of system activity for any time period. Furthermore, Cisco Professional Services can help you extend reporting capabilities so that you get the exact information you need.

Finally, agents using Cisco E-Mail Manager respond to messages using a familiar and graphical Web-based interface. Agents spend most of their time in a few simple screens, for which online help is always available. Furthermore, as described above, agents who for a variety of reasons do not log in to the system can use an everyday e-mail client application through MailTrack.

### Scaling with Your Needs

**The Challenge** An ERM system must be able to support your growing organization. It does you and your customers no good to discover that as your company experiences success, your system cannot handle all the messages you are receiving and the number of agents needed to respond to customers. Your investment in this critical platform must be for the long term.

Your ERM system must support a growing number of e-mail-enabled agents and a large volume of messages coming into multiple e-mail addresses at your company. Furthermore, the speed at which messages arrive and agents respond to them must keep pace with your needs; in other words, the system cannot slow down when you need it most.

Because the database where messages are stored is potentially quite large, your system must interact with and manage it intelligently and efficiently. Otherwise, as the database grows with messages and responses over time, you risk having this component become a bottleneck for the whole platform.

Finally, an ERM system must be flexible enough to grow in the best way for different types of companies. The scaling requirements for an enterprise are different from those of an application service provider (ASP). The design of an ERM system must provide viable scaling solutions for both types of businesses.



**How Cisco E-Mail Manager Meets the Challenge** The Cisco E-Mail Manager platform is a robust solution designed to process high volumes of e-mail messages sent to multiple addresses, and to support a large number of agents. Throughout the development process, Cisco E-Mail Manager is tested against message and agent loads that meet and exceed the loads required by enterprise-class customers.

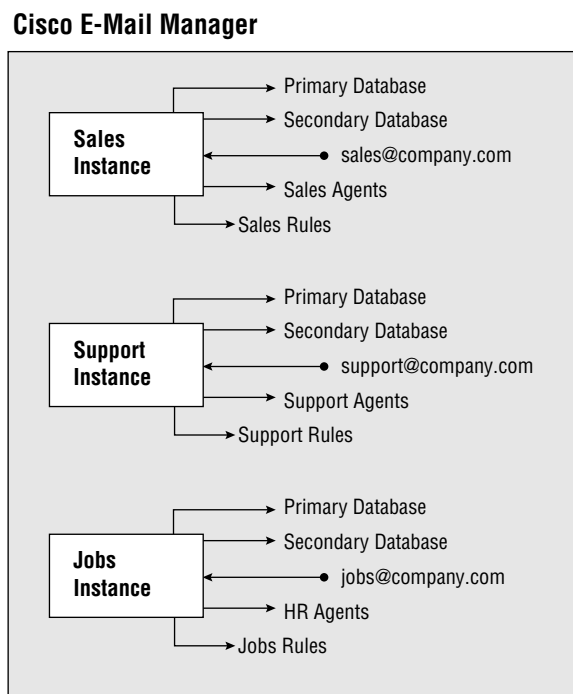
To ensure the continued performance of database-intensive transactions over time, Cisco E-Mail Manager includes a database tool called the Pruner. The Pruner is a completely configurable application that automatically moves older messages from the primary Cisco E-Mail Manager database to a secondary database. By using the Pruner, you can ensure that the primary database with which Cisco E-Mail Manager communicates does not grow beyond a certain size, thus maintaining a high performance level. Of course, agents and managers have easy access through the Web interface to all messages that the Pruner has moved to the secondary database.

### Multiple Instances

The Cisco E-Mail Manager platform is built upon a distributed architecture that provides you with multiple deployment options with which to achieve optimal performance. One aspect of the distributed nature of the platform is support for multiple instances, providing solutions for both enterprise and ASP customers. An instance is a standalone message-processing application with its own agents, rules, monitored e-mail addresses, and primary and secondary databases.

Multiple instances enable enterprise customers to create separate sets of rules and agents for the company's logical divisions. Though all part of the same installation, each instance operates separately. An example is shown in Figure 8.

**Figure 8** Multiple Instances



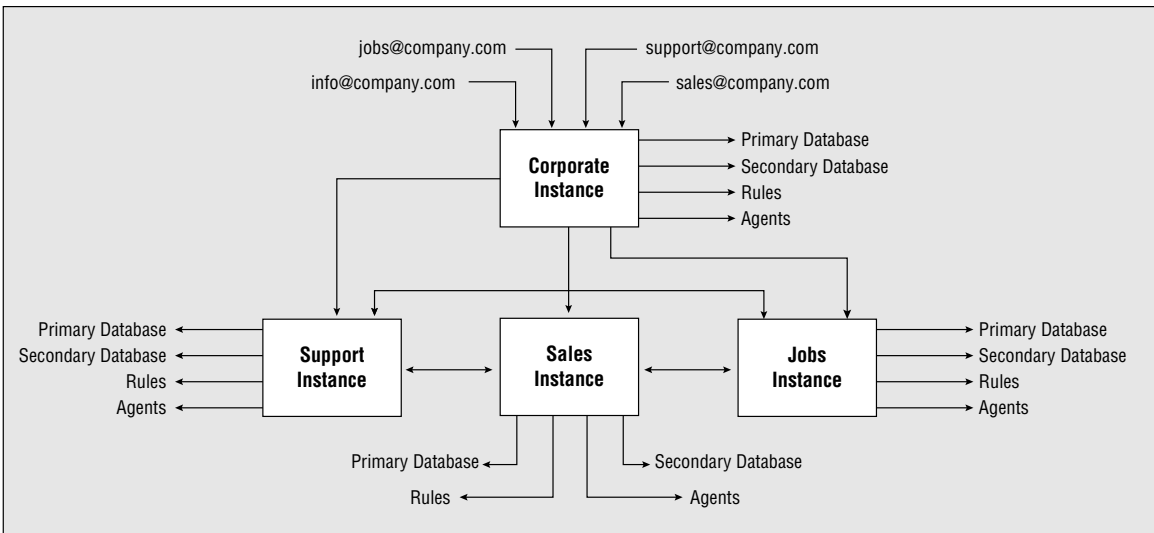
By using multiple instances in this manner, the enterprise can distribute the agent and message loads across instances, thus increasing performance.

Furthermore, instances in an enterprise environment can be connected through a matrix. In a matrix, instances still operate and are maintained separately, but instances can forward or copy messages to each other as needed. A matrix can help an enterprise distribute not just the processing load, but also the management tasks for the system. For example, you could

define the matrix so that all messages coming to your company’s public e-mail addresses enter one instance. That instance performs basic processing on the messages and determines which department should be responsible for each message, and then forwards messages to the appropriate instances in the matrix. Those instances can then process messages as required by those departments. This example is shown in Figure 9.

**Figure 9** Instances In A Matrix

**Cisco E-Mail Manager**



By using multiple instances in a matrix in this way, the management tasks are distributed to those who know their departments best. In this case, the central administrator is responsible only for configuring the first instance. Managers in each department are responsible for their own instances and can define rules and agents’ roles based on their specific and changing needs.

A matrix can also help when your customers inadvertently send a message to the wrong e-mail address. For example, your customer may send a support question to the sales e-mail address. In the matrix shown above, the rules at the Corporate instance could detect this based on the message content and forward the message, properly, to the Support instance.

By designing the logical instances and matrix up front, and by designing rules that take advantage of that design, you can ensure that messages are processed, agents complete their work, and managers get the results they want in the most efficient manner possible.

An ASP can also take advantage of the Cisco E-Mail Manager platform to provide service to multiple customers. With one Cisco E-Mail Manager installation, an ASP can create a separate instance for each of its customers. Because the different customers would not have to exchange messages, the instances would not be connected in a matrix. At each instance, all system activity, maintenance, and database operations would occur in isolation. Therefore, while the ASP maintains one installation of the platform, the ASP’s customers each work with their own instance. Importantly, security is maintained separately for each instance, so one customer would not risk exposing its system to the ASP’s other customers.

Finally, the distributed architecture of Cisco E-Mail Manager allows you to scale the platform by installing different components on different servers. For example, you could install the core server, the message processing and Web server, the primary database, and the secondary database all on different servers. By distributing components of the platform in this way, you distribute the server processing load to achieve greater performance. Most importantly, the flexibility of this distributed architecture helps you meet your specific needs.

## Summary

An e-mail response management system must facilitate your company's efforts to respond to customers, integrate with existing customer service and support systems, help you make your support organization more efficient, and grow with your company.

The Cisco E-Mail Manager platform is a comprehensive, enterprise-class solution for managing high volumes of customer inquiries submitted to your company mailboxes or Web site. Based on customizable business rules, Cisco E-Mail Manager accelerates the response process by automatically directing messages to the right agent or skill group, categorizing and prioritizing messages, suggesting relevant response templates, and, if desired, sending automated replies. A full-featured, browser-based interface provides your agents with the productivity tools and knowledge resources they need to provide fast, accurate, and personalized responses to your customers. In addition, through integration with existing CRM applications and other contact-center technologies, Cisco E-Mail Manager can help you further enhance and personalize your communications with customers. When used as part of the horizontal, open Cisco platform for customer contact, Cisco E-Mail Manager can help your organization provide customers with the freedom to interact with your company representatives in the manner of their choosing.

Whether you are building a customer support system from the ground up or integrating with existing organizational structures and legacy systems, the uniquely flexible, extensible, and scalable design of Cisco E-Mail Manager delivers a cost-effective, easy-to-implement strategy for building customer relationships over the Internet.



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