

TMC

# CUSTOMER INTER@CTION *Solutions*

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#1 In CRM, Call Centers And Teleservices Since 1982™



## Thirty Years Of Speech Technologies

An Interview With Bruce Morse,  
VP Of Contact Center Solutions

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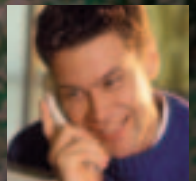
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- Data Security In The Contact Center
- Virtual Contact Management: An Alternate Route To CRM

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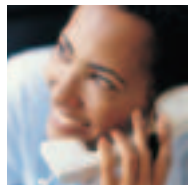
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By: Nadji Tehrani,  
Executive Group Publisher,  
Technology Marketing Corporation

# Only Early Adopters Will Succeed

## In The Call/Contact Center And CRM Industries

With the current explosive rate of technological evolution taking place in the customer interaction and CRM industries today, only the early adopters will succeed and prosper. In contrast, those companies or contact centers that do not adopt new technologies will not be around in the foreseeable future. And this is not a scare tactic.

### The Awesome Power Of Early Adopters And The Justification For It

Here are several powerful reasons that make early adoption a necessity for survival:

1. **Drastically higher capabilities.** By adopting cutting-edge technologies, such as [VoIP \(define - news - alert\)](#) and advanced speech technologies, your contact center will be enormously more

responsible for using and managing the technology's implementation.

2. **Greater productivity.** By streamlining an automation of many of the redundant processes, one can expect significant productivity increases, which usually translate into higher profitability.

3. **Far superior quality** is another fringe benefit of adopting the above mentioned technologies.

4. The above technologies can be adopted seamlessly, and if carefully planned, the implementation can be done cost-effectively.

5. Mistake-free call handling will also be a major benefit of adopting the above technologies.

6. Uniform presentations of products, services and pricing would be an additional highly desired benefit that could become available with the adoption of the above technologies.

7. Ninety percent lower telecom cost is, of course, achievable with VoIP.

8. Eighty-five percent of operation cost can be saved by adopting advanced speech technologies.

9. Last, but not least, you can outperform any offshore or domestic call

**By being an early adopter and being the recipient of the endless benefits of these technologies, you can position your company as the industry leader and differentiate yourself from the competition and aim for the greatest market share and profitability.**

powerful in terms of capabilities, flexibility and productivity. Another benefit of adopting the above technologies is the reduction of abandoned calls as well as a reduction in customer call-backs. By providing superior capabilities to the speech-enabled call centers, one could also look for less turnover for those

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The new GN 8210 amplifier shown with a GN 2100 headset.

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center with far superior quality and no cultural problems, no language barriers and no rudeness; and you can keep your valuable customers at far lower cost while earning superior profit margins.

## Why Early Adoption Is Crucial

Given that the list of the benefits of the above technologies, not to mention Web hosting, home agent services, etc., are endless, one must recognize that the above benefits will be practically immaterial if one doesn't act immediately in adoption and implementation of these new technologies.

Early adopters are like pioneers. Webster describes pioneers as:

**"A person or group that originates or helps open up a new line of thought or activity or a new method or technical development."**

The fact is, everyone remembers pioneers, while no one remembers copycats and followers. Pioneers are usually the first to start an endeavor, and that is really crucial in marketing and market share domination.

## The First Law Of Positioning

One might look at early adopters and pioneers as those who fully comply with the first law of positioning, which states: "It is better to be first than to be better in any endeavor." As I have stated several times in these editorials, this can be proven in less than one minute. Please note the following:

**Q:** Who was the first man who flew solo over the Atlantic?

**A:** Obviously, Charles Lindbergh. This is a fact that everyone knows.

**Q:** Then I ask, who was the second man who flew solo over the Atlantic?

**A:** Nobody knows and nobody cares for number two.

By the same token, by being an early adopter and being the recipient of the endless benefits of these technologies, you can position your company as the

## Congratulations To Award Winners

As the industry's leading publication since 1982, it is our distinct honor to congratulate all award winners of the 20th Annual Top 50 Teleservices Agencies Ranking (Inbound) featured in this issue.

By winning this coveted award, you have distinguished your company as one of the very best in your sector. Be sure to inform your target audience of this great news, for awards without marketing and differentiation are wasted! Please read my Publisher's Outlook titled "Award Marketing" at <http://www.tmcnet.com/cis/0203/0203po.htm>.



industry leader and differentiate yourself from the competition and aim for the greatest market share and profitability.

## The Business Facts Surrounding The Contact Center And The Overall Economy Are As Follows:

- As indicated in my January 2005 editorial, growth in the contact center industry is continuing at an extremely rapid pace. In my March 2005 editorial, I noted that Concerto, a leading supplier to our industry, announced a 75 percent increase in revenues in the fourth quarter of 2004. I also noted that several companies in the teleservices sector have also benefited from explosive growth and have now reached the elite level of the Top 10 within the prestigious Top 50 Teleservices Agencies Ranking.

I would like to use an excerpt from a *BusinessWeek* article by James C. Cooper and Kathleen Madigan. The article appeared on page 29 of the March 14, 2005, issue and read as follows:

"Optimistic businesses are revving up for growth...Companies should face less uncertainty and more demand this year...Corporate America is back in its groove, and that could shake up the whole economic outlook for 2005. For the first three years after the recession ended, businesses' plans for expansion and hiring were beaten back by one

new source of uncertainty after another, whether it was terrorism fears, financial scandals, a meandering stock market, or war. All this made the business sector an undependable contributor to economic growth. Not anymore."

## Some Important And Relevant Comments From Internet Telephony Conference Expo 2005 Keynotes

At the recent Internet Telephony® Conference and Expo, which was held February 22-25, 2005, in Miami, Florida, several leading business executives from the VoIP and contact center sectors made numerous relevant comments in their keynote addresses, which I would like to share with you as follows:

- "VoIP is positioned to be the single biggest evolution in the telecom industry."
- "It costs ten times as much to get a new customer than keeping an existing one."
- Kevin Brady, CEO of NEC, indicated, "Adaptability and flexibility are the keys to survival, not the survival of the fittest."
- "Domestic technology sales for call centers are growing strongly since 2004 and it will continue in 2005," said Brian Ross of Aculab.
- "VoIP helps agent management."
- "From PSTN to IP network represents the future of the call centers."



She just bought an HDTV  
from a guy wearing pajamas

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Concerto Software brings 30 years of insight to implementing the right solution at the right time – such as helping our customers use VoIP and remote agents to keep customers happy during seasonal peaks. After all, isn’t that what customer contact is all about?



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## A Golden Opportunity Exists For U.S. Call Centers

As the leading publication of this industry since 1982, we are in the fortunate position of keeping abreast of the trends that influence the future of our industry. My objective is to tell it like it is, and I am sure that is what our valued readers want me to do.

In my humble opinion, I see serious problems ahead for offshoring. On the other hand, I see plenty of profit opportunities for domestic call centers. As more and more dissatisfied offshore out-sourcers return back to the U.S., plus the rapidly growing U.S. economy, added to new technology benefits, offshoring becomes less and less desirable. At this point, I would like to share with you just a couple of unsatisfactory communications from some of the most popular offshore countries. (By the way, these are true stories.)

### Example A

Here is an experience cited by a vice president of marketing of a telecom company while communicating with someone in India:

"While vacationing in Orlando with my family, I called Delta Airlines to find out if my in-laws' flight was going to arrive on time. They were arriving on a later flight than the rest of us and my two-year-old and seven-year-old boys wanted to be sure Grandma and Grandpa were going to land early enough for them to make the trip to the airport before bedtime.

Rather than use the speech recognition system, I "zeroed-out" to speak to a live agent. The agent, who, based on her accent, I could clearly determine was working in an overseas center, was pleasant but very difficult to understand. I struggled to decipher the information she was trying to convey to me. She proceeded to tell me that my in-laws' flight departed LaGuardia at 7:28 p.m., and had safely landed in Orlando at 9:32 p.m. Unfortunately, the clock in my rented minivan read 7:20 p.m. Clearly, the agent had no

idea what time it was in any U.S. time zone.

The fact that the agent accidentally pulled up flight status information for the wrong day is understandable. Could be an honest error. My main issue with the situation is that she did so because she, in my opinion, had no idea what time or day it was here in the States. Had she been here in the States and been fully cognizant of the

addition, the cost of labor is skyrocketing in some of the offshoring countries, most notably in India.

### The Bottom Line

The bottom line is that for all of the reasons mentioned above, I continue to see a considerable golden opportunity for entrepreneurs who would like to get in the call center business or those who are already in it. As stated in the January

**Pioneers are usually the first  
to start an endeavor,  
and that is really crucial in marketing  
and market share domination.**

time and day, she undoubtedly would not have quoted the wrong information and wasted my time. She would have realized the information she was reading could not be correct before she conveyed it to me."

### Example B

In another case, someone who experienced problems with the running of her computer contacted the manufacturer for service. The call was connected to the Philippines. The lady who was seeking information was kept on the phone for one hour and 40 minutes to solve the problem, but unfortunately, the problem never got solved. She shared this situation with her son, who joined her and solved the problem in a matter of minutes!

I think the record speaks for itself. These are just a few examples of what is going on. Businesses are beginning to get negative vibes about offshoring. In

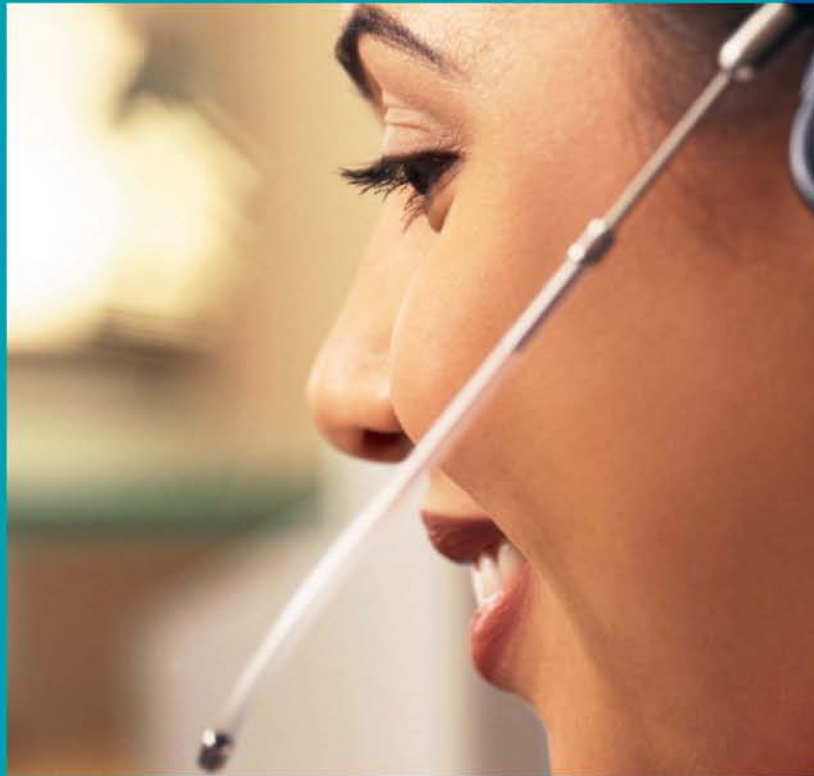
2005 issue, the future simply couldn't be brighter.

Please join me at the forthcoming Speech-World™ Conference and Expo (<http://www.speech-world.com>) to be held May 24-26, 2005, at the Westin Park Central Hotel in Dallas, Texas. This show is co-located with the IP Contact Center Summit™ as well as the Global Call Center Outsourcing Summit™. I urge all of you to join me at this conference. Let us learn from the lectures by experts and visit the exhibit hall and gain the information we need to take our call centers to the next level and be in a great position to profit from the new boom ahead.

As always, I welcome your comments. Please e-mail me at [ntehrani@tmcnet.com](mailto:ntehrani@tmcnet.com). **CIS**

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Nadji Tehrani  
Executive Group Publisher, Editor-in-Chief*

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For many companies, the thought of introducing speech automation to customers immediately conjures up an unpleasant compromise: saving the company money while risking customer dissatisfaction, and a zero-out to speak with a live agent. Not only is there the chance of negating the savings, there is also a chance of endangering goodwill with the customer and losing his or her business.

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### Contact Centers Leery Of VoIP

By David Sims, TMCnet CRM Alert Columnist

The Yankee Group has announced research showing that contact centers have been cautious in their adoption of voice over IP technology. In cases where penetration has occurred, the switch has been driven solely by application needs and, in isolated cases, reduced infrastructure costs, Yankee finds. These results prove the lower total cost of ownership metric is not driving migration of circuit-switched agent stations to VoIP. Read the full article at <http://www.tmcnet.com/105.1>

### Special Report: VoIP Taking Root In Business

By Johanne Torres, Contributing Editor, TMCnet.com

Awareness and familiarity of VoIP are significantly higher among businesses than among consumers, a new nationwide survey of U.S. adults published this week revealed. According to the study results, while nearly nine in 10, or 87 percent, of business decision makers are aware of VoIP and 76 percent are at least somewhat familiar, only one-third, or 36 percent, of consumers are aware of VoIP; and 56 percent are at least somewhat familiar.

Read the full article at <http://www.tmcnet.com/106.1>

### CEM And...Search Engines?

By David Sims, TMCnet CRM Alert Columnist

"Customer Experience Management"... sounds so... welcoming. Like a dinner jacketed concierge greeting you as you walk in the door, solicitous for your every whim to ensure your experience. Much of the theory behind CEM comes from the 2004 book "Customer Experience Management: A Revolutionary Approach to Connecting with Your Customers" by Bernd H. Schmitt. As one Amazon reviewer described it, "The revolutionary approach that Bernd H. Schmitt is advocating here wouldn't sound so radical to anyone who has ever been in therapy: be aware, see things from other people's point of view, address their concerns."

Read the full article at <http://www.tmcnet.com/107.1>

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By: Rich Tehrani,  
Group Editor-in-Chief,  
Technology Marketing Corporation

# Speech And IP Contact Center Technologies

Two of the most exciting areas of the call center industry today are speech and IP contact center technologies. Recently, I spent some time talking with people who are intimately involved in both markets to ascertain what more specific trends are showing up in these industries. I wasn't prepared to hear how fast things are moving and how exciting some of the growth opportunities are. Based on my conversations, I truly believe these technologies will change the landscape of telecom as we know it. But I don't want to ruin anything. It's better to let the experts speak for themselves, though I'm sure I'll add some color and opinion throughout this discussion. I will start with my first conversation, with contact center solutions provider SER (<http://www.ser.com>). In the past, this company was best known for its predictive dialers (the company used to be called EIS), as they are one of the largest companies in this space. Most people don't know that the company has shown tremendous innovation in speech technology.

## Speech Improves Call Quality

I spoke with SER CTO Larry Mark and asked him about the future of speech. Larry is confident that speech is in the mainstream now. The industry is

ual processes and perform them more quickly.

Speech changes the economics of quality assurance and agent measurement. It allows companies to economically monitor individual agents, while also keeping track of larger samples across entire enterprises. SER plays in what some analysts call the "agent performance optimization" space. SER customers can now measure their call centers more efficiently and, in the process, they can reduce expenses dramatically. Larry points out that the contact center is the face of the company, which is why it's so important to monitor what customers are hearing.

**Call center equipment must centralize technology while enabling local autonomy. By employing multitenant technology, companies can accomplish this goal.**

seeing more self-service applications, but we also now have the ability to perform automated quality monitoring and agent optimization using speech. These technologies are coming of age. In many cases, speech can replace expensive man-

## Speech Makes Customers Happy

I also had a chance to speak with Greg Simsar, who is VP of Speech Services at Syntellect (<http://www.syntellect.com>). Greg told me he is more excited about

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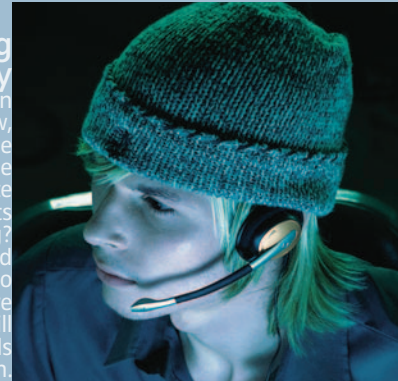
### Office and Contact Center Headsets

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the change in mindset of his customers than the technology. It's becoming obvious that when it comes to self-service, people prefer speech to touch-tone. As Greg points out, when implementing speech, it's important to do it right — you must have a quality user interface.

Greg elaborated further, indicating that speech is not just about cost, it's also better for the customer. He gave me an example. Syntellect has a customer that's in the appliance repair business. This company rolled out speech, and first focused on customer containment — keeping the customer in the speech system instead of letting him or her speak with a live agent. Customer satisfaction dropped considerably. This caused the repair company to experience an epiphany. It decided to redesign the interface and focus on the customer experience. Customer satisfaction went up 20 percent and, as a result, more appointments were scheduled, yielding more revenue for the company.

Greg also sees great things happening in the enterprise portal space. As you may recall, this was an oft discussed topic in 2000, but it faded considerably when the tech bubble burst. I asked for more detail, and Greg told me that instead of having two separate phone numbers, one for the auto-attendant and another for a speech system that might give a bank balance, for example, companies are using a single voice interface to front-end everything. Customers now have an easier time getting the information they want in a single integrated system.

## SMBs Embrace Speech

I then had a chance to speak with **Chris Lotspeich, Director of Marketing at LumenVox** (<http://www.lumenvox.com>), and I asked him for his perspective on the growth of the market. Chris tells me he thinks small to medium-sized companies are where the growth potential is. I asked him why, and he told me it's because of the dynamics of the market.

The larger companies traditionally want to speech-enable the whole works...every system across the enterprise. It's what they do best.

Small companies, however, are happy to start with the auto-attendant and move up the chain as their needs grow and their companies expand. Additionally, smaller companies are happy with prepackaged apps, while large companies increasingly tend to demand more customization.

I asked when we might see a turning point in speech, and Chris told me that many of the IP-PBX companies are incorporating speech into their applications today; companies such as **Vertical** and **Interactive Intelligence**, for example. Though not all companies may be implementing speech today, they are considering it a line item in the RFP process. It's only a matter of time before use becomes widespread.

Another trend, Chris pointed out, is that the focus on natural language recognition is not where it was in the past. Eighty percent of companies don't need natural language recognition in their applications. Instead, they may have three to five questions they need answered, and this can easily be handled by directed dialog methods.

Chris pointed out that one area of strong importance is tuning and testing. Companies are looking for expertise in these areas. As education increases, Chris said, customers will make more informed decisions. Finally, he stated that he sees significant opportunities for resellers in the speech arena.

## IP Contact Centers Evolve

From speech, we delve into the world of IP contact center technologies, where **Telephony@Work** (<http://www.telephonyatwork.com>) is one of the players. I had a chance to speak with **Eli Borodow, CEO** of the company, and I asked him what he sees in the future of the IP contact center.

Eli says he sees real-time optimization as the future. Companies such as **MCI** ([quote - news- alert](#)), **Siebel** ([quote -](#)

[news- alert](#)) and **TELUS** ([quote - news- alert](#)) are partnering with **Telephony@Work** to provide applications with this technology to their customers.

Eli believes call center equipment must centralize technology while enabling local autonomy. By employing multitenant technology, companies can accomplish this goal. This allows for true flexibility in enabling different parts of the organization to meet the various needs of its customers.

Eli went on to say that call center analytics in the past have been a proactive science. Analytics have usually relied upon historical data to help avoid bottlenecks. **Telephony@Work** is working with **Siebel** to allow analytics to be reactive. This technology allows granular changes in real time. If you don't get it right the first time, you can react and alter the workflow in real time.

Eli offered as an example a campaign in Chinese, English and Spanish. Imagine that as you run this campaign, you note the Chinese script is taking 10 minutes longer than the English and Spanish scripts. Accordingly, you can alter the parameters of the Chinese campaign. Perhaps Chinese is a more difficult skill and in this campaign, it's vital to weigh language skills more heavily and customer service skills second.

You can also allow customers to leave voice mail and have their calls returned when an agent is available. You can change the workflow rules. You can also perform other important tasks such as increased recording and logging if you find that there is an elevated complaint level.

Eli told me the near future is here, as you can already take advantage of menu-driven systems that don't require reboots or MIS involvement, as well as real-time optimization.

Eli finished with an analogy. The battle of the computer versus the chess grand master is well known. At some point, the computer will win the optimization battle. We don't all have chess



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(or call center) geniuses in our companies, so at some point soon, contact centers will have to rely on computers for optimization.

The levels of automation being discussed today are amazing to me. It is now possible to have inexpensive speech systems that will answer a lot of customer questions, reducing the expense of having to take all your calls live. Even if calls end up with a live agent, you can monitor what the agent says. You can, for example, alert a manager if the name of a competitor comes up in the conversation. You can also transfer a call to a manager if profanity is uttered or voice stress is high. If that isn't impressive enough, with reactive analytics, you can have your call center react to the realities of an evolving business. You literally can have the chess grand master equivalent in the contact center. Now that's a future that's good for the industry as well as our customers.

### Visit All These Companies At Speech-World/IP Contact Center Summit In May

Speech-World is on fire. I have been monitoring the registration database and am bowled over by the major companies that are going to be at the show. This is the first speech show that is truly targeted toward contact center managers and, more important, is located where the call centers are. We find Dallas to be the ideal location for such a show, as it has a critical mass of contact centers and is located just outside the nation's telecom corridor.

In short, we could not have picked a better venue, and the audience that has registered thus far echoes this sentiment. The largest banks and service providers will be in attendance. These are just a few of the categories reflecting amazing attendance numbers. The database growth is truly staggering — ensuring that we will be guaranteed a full house. I am very excited to be launching this event, and I will go out on a limb and say now that 2006 will be the year of

speech. **This means that people are coming to Speech-World now to evaluate the products and services they will need to speech-enable their organizations in the upcoming months.**

Speech-World is co-located with our popular IP Contact Center Summit, as well as the Global Call Center Outsourcing Summit (GCCOS), the only event specifically designed for organizations that provide call/contact center/customer services on an outsourced basis. This is a hot topic today, surrounded by a multitude of issues such as compliance, federal legislation, data security,

had its computers broken into, and customer data were compromised. Paris Hilton, who seems to have an incredible knack for getting in trouble, was a T-Mobile customer at the time, and her address book, to-do list and personal photos were all exposed on the Internet (pun sort of intended).

What's the reason for this history lesson on security? It's simple. Contact centers and CRM managers are in the hot seat. We are targets. Simply stated, we are preyed upon continuously by those who would steal data for the fun of it or so they can use the information to steal from a company's customers. At

**You can, for example, alert a manager if the name of a competitor comes up in the conversation.**

**You can also transfer a call to a manager if profanity is uttered or voice stress is high.**

offshore and nearshore outsourcing and much more.

I invite you to register today at <http://www.speech-world.com>. The show will take place May 24-26, 2005, at the Westin Park Central Hotel in Dallas.

### Choice Words For ChoicePoint

While many of us have been going about our normal business, executives at ChoicePoint have been busy fielding questions from Congress. Hopefully, none of our readers were among the 145,000 ChoicePoint customers who were affected by the theft of social security numbers and other sensitive information. To be fair and not single out ChoicePoint, I should point out that LexisNexis ([news - alert](#)) also had its systems broken into. Even service providers have been hacked. T-Mobile

the moment, the federal government is weighing many options. The problem of identify theft is at the forefront right now, so when it comes to sensitive data, we may see some drastic measures on Congress' part in the near future. ChoicePoint, for example, sells social security number data. Congress is considering making it illegal to sell such numbers. As with many laws passed within the confines of the telecommunications/call center industries, such legislation is often reactionary. Your industry could be next.

Please take this as a warning. We are all targets and we are all potential hacker trophies. We need to make sure our ducks are in a row or the federal government will come calling. In the end, we will have only ourselves to blame. **CIS**

*Sincerely yours,  
Rich Tehrani  
Group Publisher, Group Editor-in-Chief  
[rtehrani@tmcnet.com](mailto:rtehrani@tmcnet.com)*



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# 2005 Recommended Vendor List

## The TMC Seal Of Approval

The following Recommended Vendors have distinguished themselves by winning one or more of TMC's coveted awards, earning them the TMC Seal of Approval.

### CRM/Contact Center Software/Hardware

Jacada



Left Bank Solutions



Mercom



Sennheiser Electronic Corporation



Spectrum Corporation



Stratasoft, Inc.



Telephony@Work



Witness Systems



### List and Sales Lead Databases

infoUSA



### Teleservices Outsourcing

West Corporation



InfoCision Management Corporation



### CRM/Contact Center Software/Hardware

Amae Software



Aspect Communications Corp.



Davacord (formerly VoiceLogger)



GN Netcom



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\* Source: Bain & Co., 2003.

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## NetSuite 10.0 Offers Aerial View Of Customers

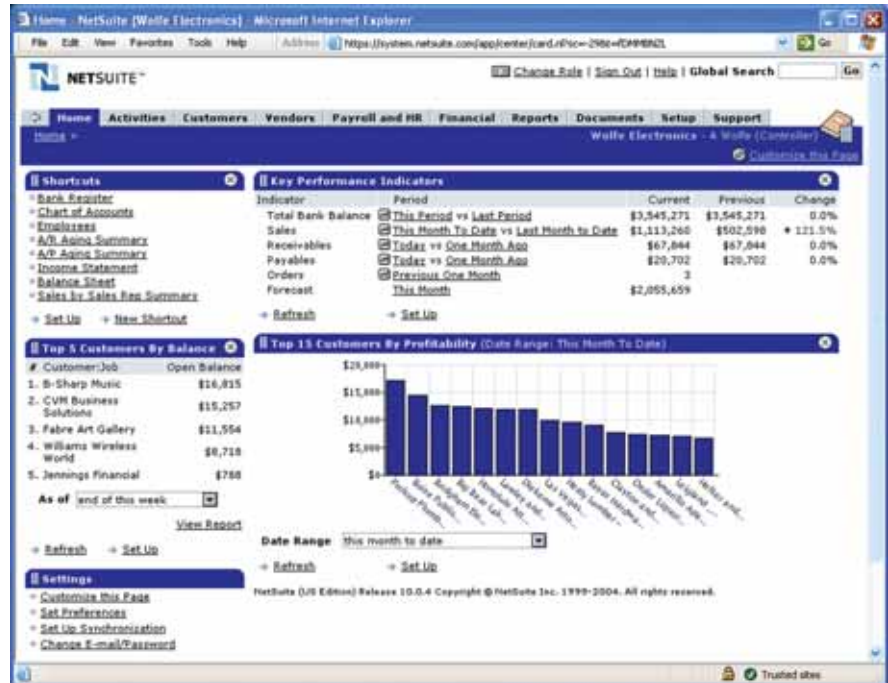
By David R. Butcher,  
 Assistant Editor,  
 Customer Inter@ction Solutions

“We’re working from the cockpit with proper instruments, rather than working with a crystal ball,” said Sean Rollings.

NetSuite’s (news - alert) senior director of product marketing wasn’t talking about weekend flight training on a 747, nor was he recounting a flashback to an air attack that never took place; rather, he was talking about the use of NetSuite, Inc.’s version 10.0 of the company’s flagship NetSuite solution, an intelligent, integrated and simpler-to-use application that includes CRM, financials/ERP, e-commerce and employee management/productivity features.

As noted by the company, for years CRM vendors have been assertively proffering a “360-degree view of the customer” to allow visibility into every interaction, though without actually delivering wholly. Stand-alone CRM systems are typically designed to manage data related to internal sales processes (e.g., forecast generation), while actual customer data (e.g., customers’ purchase history) reside in separate systems.

NetSuite offers the true view. Released last October, NetSuite v10 offers all data (real-time and historical) in one application; with integrated data and business workflow, real-time visibility across the enterprise, in a modular implementation. Version 10.0 tenders the same functionality as its predecessor versions, though now with numerous added capabilities, regard-



less of whether it’s delivered as an Internet service or as an on-premise solution. The application’s cardinal distinction: its One System architecture, which allows CRM, ERP (define - news-alert) and e-commerce processes all to be managed in a single database pari passu — simply, it offers a true 360-degree view of the customer. Further, it extends this approach by adding manifold new capabilities.

### Upsell Manager: Sure, I’ll Take One Of Those, Too

Building on its already-unique order management functionality, version 10.0 offers an intelligent agent, called Upsell Manager, for automatic real-time or historical mining of a customer’s database of purchase transactions to suggest cross-sell/upsell opportunities. NetSuite Upsell Manager automatically suggests products and proposes services that a customer is likely to purchase based on statistical intelligence gained via analysis of aggregate customer purchase history stored within NetSuite; each

customer and opportunity record has a new profile tab that suggests the products or services a sales rep should offer based on this automated and actionable intelligence. Additionally, marketing personnel or individual reps can leverage this intelligence to create cross-sell campaigns targeted at customers identified by NetSuite Upsell Manager as having a high likelihood to purchase products or services.

### NetCommerce Analytics: Orwellian For Attaining Specific Data

CRM systems generally are not designed to support e-commerce, despite today’s customers expecting a company’s Web site to be the primary interaction system record. NetCommerce Analytics takes selling on the Web to another echelon. Whereas generic Web reporting tools often provide only aggregate analysis significant to number of page hits or most popular pages, NetCommerce Analytics can provide such data on a customer-by-customer basis. Even

more powerful, NetCommerce Analytics, sold as an add-on module, also tracks click-stream data on a user-by-user basis, so sales representatives can see the most recent activity of a client or prospect on a Web site as easily as they can log a phone call. They can see everything about a prospect's or customer's Web site activity, whether based on aggregate or individual customer profiles and behavior; in doing so, they have improved opportunities of service. They can see everything, instantly attaining insight to understand customers' wants and needs.

**Dashboards: Track It, Get It**

A dashboard can be similar to a politician: the dashboard is only as good as the data that underlie it. And a politician is only as good as his or her stances of issues that underlie.

NetSuite tracks every interaction between a vendor and its customers, and its patent-pending dashboards deliver this information more richly and in real time. The company's real-time dashboard comes with 15 prepackaged roles and drag-and-drop capabilities; the real-time dashboard provides data from every department of a company, allowing executives and employees to spend more time analyzing and acting upon data, rather than overtaxing their time and effort in gathering those data. Added to v10.0 is key performance indicators (KPIs) access, such as forecast, new orders, accounts receivable, support cases and items to ship, anytime/anywhere. Graphical reports and snapshots — including keyword conversion to purchase — are highly customizable, offering flexibility to publish dashboards to specific users. Users are enabled to drill down into the information for penetrating understanding. Further provided in the business application is the ability to deliver external Internet content directly to a user's dashboard.

**Sometimes Only The Seasons Change**

As well as all aforementioned added

functionalities, version 10.0 of NetSuite still offers its CRM features: sales force automation; marketing automation; customer support and service; partner relationship management; and productivity tools.

Financials/ERP features still include the following: order fulfillment; purchasing and vendor management; financial management; inventory management; and payroll and employee management.

The suite's e-commerce features: a database-driven Web store, for all wholesale/distribution business functionality; a database-driven Web site; Web analytics; an international/multicurrency option for choice of currency to transact with; multisite and domain redirects; a customer and vendor center for self-service, order tracking, payments and purchase orders; and online support.

And finally, the employee management and productivity features include the following: role-based dashboards; group calendaring and collaboration; employee records; expense reporting and purchase acquisitions; and employee self-service.

Targeted at growing and medium-sized businesses, and offering true CRM — as opposed to only prospect management — as well as second-generation e-commerce, NetSuite v10.0 is available now with plentiful features and functionality. Forget the crystal ball in knowing and understanding what's going on in your business. The behavioral intelligence, order intelligence and customer intelligence NetSuite provides are of indispensable distinction for those who want the proper instruments when in the cockpit. **CIS**

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SPIRIT Offers Free Trial Version Of TeamSpirit,  
Multipoint IP Conferencing  
SugarCRM Launches Online Destination For Community  
Collaboration  
Toshiba Ships New Strata CIX Pure IP Telephony System  
Unveil, ScanSoft Partner To Deliver Speech-Enabled  
Call Center Applications  
VanillaSoft To Integrate Do-Not-Call Service In Web-Based  
B-to-C CRM/SFA Software  
Vocomo's VoiceXML IVR Starter Kit Available For A  
Limited Time  
VoiceLogger Changes Corporate Name To Davacord



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### Soffront Announces New Version Of CRM Software For The Midmarket

**Soffront Software, Inc.**, ([news - alert](#)) a provider of midmarket CRM, has announced version 8.5 of its CRM software, Soffront CRM. Currently available as an on-premise, hosted or host-to-own model, this enterprise solution allows midsized businesses to implement an integrated, affordable, enterprisewide CRM solution for better communication, enhanced workflow and improved productivity.

Soffront CRM v8.5 incorporates new modules that extend the CRM system functionality beyond sales, marketing and customer support. With Soffront CRM, new functionality includes an order processing module, sales commission and a framework for interfacing with popular accounting systems.

Soffront CRM now allows every department in an organization — be it customer service, help desk, sales, marketing, engineering, accounting or order fulfillment — to use one system for tracking all aspects of a product or service.

As well as the typically provided CRM functions, Soffront CRM offers additional features: portals for partners; an employee management system; portals for employees; an asset management system; defect and requirements tracking; project and time tracking; order processing; and sales commissions. The extensive set of modules and customization capabilities of Soffront CRM help create a CRM system that is built for the entire enterprise at a midmarket price.

<http://www.soffront.com>



### Softline ACCPAC Upgrades ACCPAC CRM To v5.7

**Softline ACCPAC Ltd.**, ([news - alert](#)) part of the **Sage Group** family of companies and provider of end-to-end business management applications, has announced ACCPAC CRM version 5.7, a substantial upgrade to its customer relationship management software. The new version includes significant enhancements that improve integration with other business applications; as well, it provides mobile users with increased flexibility and functionality.

CRM 5.7 introduces an upgrade to the existing Web services API, which allows businesses to create sophisticated integrations with both Web-deployed and LAN-based business management applications they count upon for daily operations.

Specific elements of CRM can be called by other applications utilizing this new Web services capability and related standards, such as XML and SOAP.

With this feature, employees are better informed because their CRM application and various supply chain applications can now “speak” to one another.

Also, “a new, centralized document library in version 5.7 allows sharing of corporate documents with all users of the system,” said Jeremy Waterman, Softline ACCPAC managing director. “This feature makes it easy to secure, share and maintain items such as internal corporate presentations, templates, etc., with all ACCPAC CRM users.”

Further, several new Outlook integration features have been added to CRM 5.7. “This product offers clients significantly more freedom of choice than competitive solutions by eliminating the vendor or technology ‘lock-in’ associated with other CRM applications and hosted services that prevents clients from choosing their deployment model, platform or architecture,” said Waterman.

<http://www.accpac.co.za>

## Time America Introduces IVR System For Time, Labor Management

Time America, ([news - alert](#)) a provider of Web-based, client-server and desktop time and labor management solutions, has developed a proprietary IVR telephony system to make it easier for companies to track time and attendance for remote employees.

Developed to be used in conjunction with Time America's 100-percent HTML NETtime labor management solution, this new IVR system enables companies to track employees who work in the field or in a remote office, to clock in and out, to transfer labor hours, to submit time sheets, to check benefit accruals and to review hours worked from a land line or cellular telephone.

"We wanted to provide our customers a seamless integration between telephony and labor management," said Bahan Sadegh, chief technology officer for Time America Inc. "Our customers demand complete control over their telephony system. By delivering our own solution, not only can we provide real-time data, but we can provide our customers with the fastest response time, greatest flexibility and, ultimately, the most reliable employee information."

Time America's advanced IVR system features include text-to-speech capability, which uses a voice synthesizer that recognizes typed text and converts it to speech, providing total customization of voice prompts. The IVR system also delivers caller I.D. restriction, which allows companies to define which phone numbers their employees are allowed to call. In addition, the system's cost model is a simple per-minute charge.

<http://www.timeamerica.com>

The screenshot displays the 'Admin' section of the NETtime web interface. At the top, there are navigation links for 'Admin', 'Status Board', and 'LOG OUT'. Below the navigation bar, the 'NETtime' logo is visible on the left, and 'POWERED BY TimeAmerica' is on the right. The main content area is divided into two columns. The left column contains sections for 'Telephony Phone Numbers' (with sub-links for General, Accrual, and Absent Call Back Settings), 'Standard Telephony Number' (866-494-4429), 'Custom Telephony Numbers' (800-555-4444, 800-555-3333, 800-555-5555), 'Employee Phone Assignment' (with a note that English is the only language currently available), and 'List of Telephony Policies' (showing 'TelePunchPolicy 7' and 'TelePunchPolicy 41'). The right column contains 'Telephony Phone Number Properties' with checkboxes for 'When call is completed, start from the beginning', 'Restrict users' calls to authorized telephone numbers', and 'If the user calls from an unauthorized number, play the warning message'. There is also a 'Login using' dropdown menu set to 'Employee Number' and 'Languages' section with checkboxes for 'English Messages' and 'Spanish Messages'. An 'Apply Changes' button is located at the bottom of the right column. The footer of the interface reads '(c) Copyright 2004 TIME AMERICA INC.'

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### Epicor Unveils Integrated HR Management System

**Epicor Software Corporation** ([quote](#) - [news](#) - [alert](#)) has announced Epicor Vantage HRMS, powered by Open4 from **BMH, Inc.** ([news](#) - [alert](#)), a comprehensive management solution that streamlines organizations' HR processes. BMH is a supplier of HR and payroll software.

Vantage HRMS can administer applicant tracking, benefit programs, workforce training and development, complex union dues calculations and benefits, and ever-changing governmental regulations.

"As part of our strategy to provide midmarket companies with a single source solution for their enterprise software needs, Vantage HRMS will empower our customers to streamline human resources processes for more cost-effective and strategic management, further strengthening our already robust offering to manufacturers," said John Hiraoka, senior vice president of worldwide marketing for Epicor.

Vantage HRMS is available with Epicor Vantage, an end-to-end manufacturing system that addresses the core business needs of make-to-order (MTO) and mixed-mode manufacturers with built-in workflows managing the entire order cycle — from marketing and sales, through production and planning, sourcing and procurement, installation and service and financial recognition.

The Employee Self Service (eSS) portal is an add-on module to Vantage HRMS designed for employee satisfaction as well as operational efficiency. The eSS portal enables a company to make the most of its intranet by allowing real-time employee access to training history, benefits updates and general employee information.

Both Epicor Vantage and Vantage HRMS, powered by Open4, utilize Progress OpenEdge technology from the OpenEdge Division, an operating unit of Progress Software Corporation and a supplier of technology for building business applications.

<http://www.epicor.com>  
<http://www.open4.com>



### Merced Systems Announces Performance Suite 2.5 Release

**Merced Systems Inc.** ([news](#) - [alert](#)), a provider of contact center performance management applications, has announced the release of the Merced Performance Suite 2.5. The Merced Performance Suite can increase efficiency of contact centers by consolidating data from disparate sources, delivering advanced analytics, providing personalized dashboards, and integrating workflow and process improvement tools.

A standout feature is the new staff performance dashboard and preconfigured workflows, which allow customers to more quickly automate and streamline supervisor activities across an operation.

The latest release offers the same functions as previous versions: data management, workflow and enterprise-class scalability. Unique to version 2.5, the Merced Performance Suite extends its data management and workflow capabilities by introducing two new features: a staff performance dashboard, a tool for supervisors that provides a single, unified view into agent performance; and preconfigured workflows, for guiding supervisors through industry best practices. Three prebuilt workflows that can be configured to meet customers' specific needs are coaching, recognition and voice of the customer.

<http://www.mercedsystems.com>



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Time America, ([news - alert](#)) a provider of Web-based, client-server and desktop time and labor management solutions, has developed a proprietary IVR telephony system to make it easier for companies to track time and attendance for remote employees.

Developed to be used in conjunction with Time America's 100-percent HTML NETtime labor management solution, this new IVR system enables companies to track employees who work in the field or in a remote office, to clock in and out, to transfer labor hours, to submit time sheets, to check benefit accruals and to review hours worked from a land line or cellular telephone.

"We wanted to provide our customers a seamless integration between telephony and labor management," said Bahan Sadegh, chief technology officer for Time America Inc. "Our customers demand complete control over their telephony system. By delivering our own solution, not only can we provide real-time data, but we can provide our customers with the fastest response time, greatest flexibility and, ultimately, the most reliable employee information."

Time America's advanced IVR system features include text-to-speech capability, which uses a voice synthesizer that recognizes typed text and converts it to speech, providing total customization of voice prompts. The IVR system also delivers caller I.D. restriction, which allows companies to define which phone numbers their employees are allowed to call. In addition, the system's cost model is a simple per-minute charge.


<http://www.timeamerica.com>

The screenshot displays the 'Admin' section of the NETtime web interface. At the top, there are navigation links for 'Admin', 'Status Board', and 'LOG OUT'. Below the navigation bar, the 'NETtime' logo is visible on the left, and 'POWERED BY TimeAmerica' is on the right. The main content area is divided into two columns. The left column contains sections for 'Telephony Phone Numbers' (with links for General, Accrual, and Absent Call Back Settings), 'Standard Telephony Number' (866-494-4429), 'Custom Telephony Numbers' (800-555-4444, 800-555-3333, 800-555-5555), 'Employee Phone Assignment' (with a note that English is the only language currently available), and 'List of Telephony Policies' (showing 'TelePunchPolicy 7' and 'TelePunchPolicy 41'). The right column contains 'Telephony Phone Number Properties' with checkboxes for 'When call is completed, start from the beginning', 'Restrict users' calls to authorized telephone numbers', and 'If the user calls from an unauthorized number, play the warning message'. There is also a 'Login using' dropdown menu set to 'Employee Number' and 'Languages' section with checkboxes for 'English Messages' and 'Spanish Messages'. An 'Apply Changes' button is located at the bottom of the right column. The footer of the interface reads '(c) Copyright 2004 TIME AMERICA INC.'

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### WebEx Announces Enhanced Training Center

WebEx Communications, Inc. (quote - news - alert), a provider of Web meeting applications, has announced the release of an enhanced version of WebEx Training Center that enables companies to create, manage and deliver both live and on-demand training. By integrating the editing and publishing features of WebEx Presentation Studio, the WebEx Training Center is aimed at making easier the creation and modification of new or recorded live training material for on-demand, asynchronous training.

WebEx Training Center's e-commerce capabilities allow organizations to leverage this comprehensive package to transform training into a strategic line of business and create new revenue opportunities.

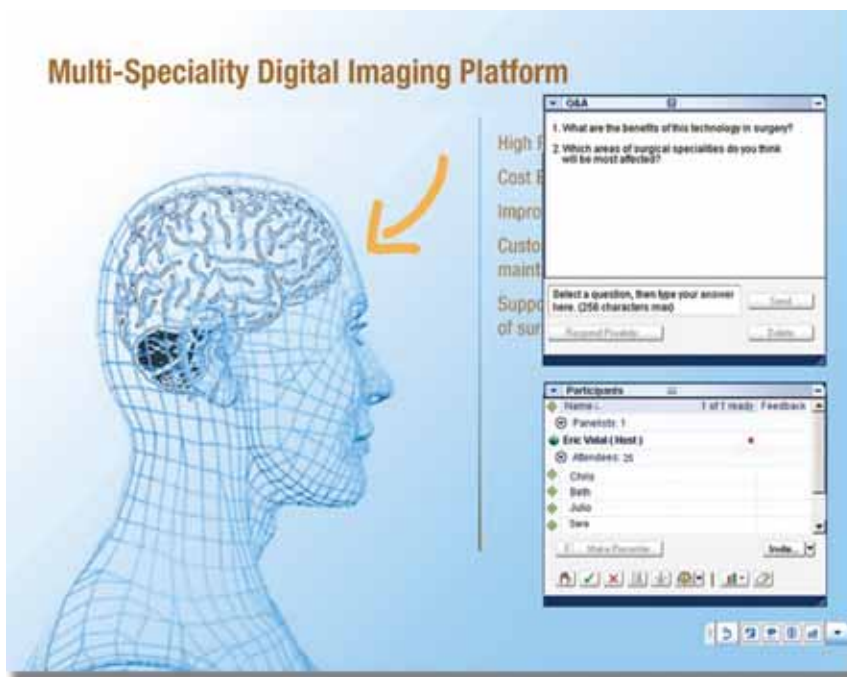
The new WebEx Training Center application includes capabilities specifically designed to help companies deliver live and on-demand Web training through enhanced usability in delivery and management.

The new capabilities for on-demand training include the following: rapid content creation and publishing; integrated testing for recorded sessions; attendance and duration tracking; and intelligent search and access.

The application's extended capabilities, for creating and delivering live, real-time, Web-based training, include the following: PowerPanel Interface; flexible audio and video; multilingual support; and international telephony.

Through the merging of live and on-demand capabilities, strategic capabilities for managing both synchronous and asynchronous training include the following: automated e-commerce; a learner training profile; a trainers' dashboard; application suite integration; and comprehensive enterprise integration.

<http://www.webex.com>



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### ATG Offers Suite Of Application Hosting Services

ATG (Art Technology Group, Inc.), (quote - [news](#) - [alert](#)) a provider of software for marketing, commerce and customer service experiences, has announced ATG On-Demand, a suite of application hosting services that provide ATG customers with significant flexibility, convenience and performance. ATG On-Demand delivers ATG's e-marketing, e-commerce and e-service solutions via application hosting and managed services, enabling customers to reap the benefits of an application service provider (ASP) model without traditional limitations on customization, integration and security.

"There are a number of critical advantages to application hosting, including accelerated implementation timelines and faster time-to-benefit, lower up-front cost, predictable ongoing expense, reduced IT overhead, and ease of installation, updates and maintenance," said Bob Burke, president and chief executive officer of ATG.

ATG On-Demand offers a collection of dedicated service options for accelerated performance and secure integration with local enterprise applications. Complete customization and tuning services are provided by ATG application experts. Additional offerings include uptime guarantees of up to 99.9 percent and optional dedicated servers/databases to ensure security, integrity and data privacy.

<http://www.atg.com>

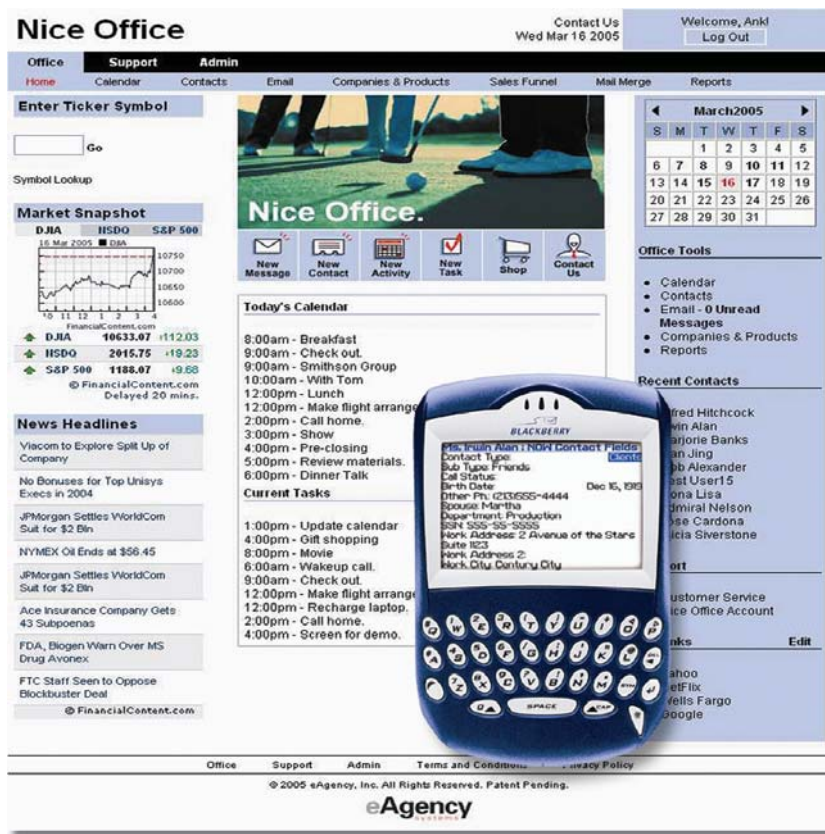
### eAgency Launches Wireless On-Demand CRM

eAgency Systems, ([news](#) - [alert](#)) a provider of on-demand CRM solutions for the small to medium-sized office/home office market, has announced the launch of its CRM wireless solution, Nice Office Universal Edition. Nice Office Universal Edition is available on Research In Motion's (RIM) ([quote](#) - [news](#) - [alert](#)) BlackBerry wireless platform, and it features over-the-air wireless synchronization of sales and customer data as well as e-mail, calendar and contacts.

By extending the company's current enterprise and Web-based information exchange platform to the wireless mobile user, eAgency intends for corporate and independent representatives to be able to manage prospects, clients, sales activities or check commissions status right from their BlackBerry Wireless Handheld without the need to dial up, log on or cradle the device. The solution is also available in a corporate dashboard version that enables users to view production reports, monitor account status, track agent activity and distribute leads.

A significant feature of Nice Office Universal is its over-the-air wireless sync capabilities, available for e-mail, calendar and contacts, as well as business data. Built with Sun's J2ME technology, eAgency has created customized user interfaces and persistent storage on the BlackBerry Wireless Handheld. Business-specific information is tightly integrated with the existing BlackBerry user interface to offer a seamless transition from contacts and calendar to detailed sales and status information — all encapsulated in an end-to-end encrypted data packet.

The product will debut on multiple carriers. <http://www.eagency.com>  
<http://www.rim.com>



The features we like most are the easy-to-read displays and the clear, crisp sound of the .wav files. - **PODS, Inc** We were up and running the same day. I would recommend it to others because of its dependability, reliability and fantastic customer support.

- **Classic Limousines** ... very competitively priced, very customer friendly in the area of configurability, and very easy to use. Without a doubt it's the only application that I've ever installed in my 25-year career where everything from implementation to training went completely as planned.

- **Service, Electronic Transaction Consultants** We looked carefully to find a recording company that met our extensive list of requirements and couldn't be happier with the solution they had for our trading company. - **Samco Trading** The DigiVoice XE is easy to use and completely reliable. The best system out there today. - **Phillips** The recording is far superior to our old system and we now have instant access to any recording on our network. - **AXIUS Communications** Very reliable, very easy to use, very easy to train on. It doesn't overburden you with things you don't need, but gives you the ability to scale up to things you need later. - **Comcast** I don't think you'll find a better value for the price you'll pay and the system is very friendly. - **University of South Florida**



# Everybody's Talking about Davacord not just because they were known as VoiceLogger

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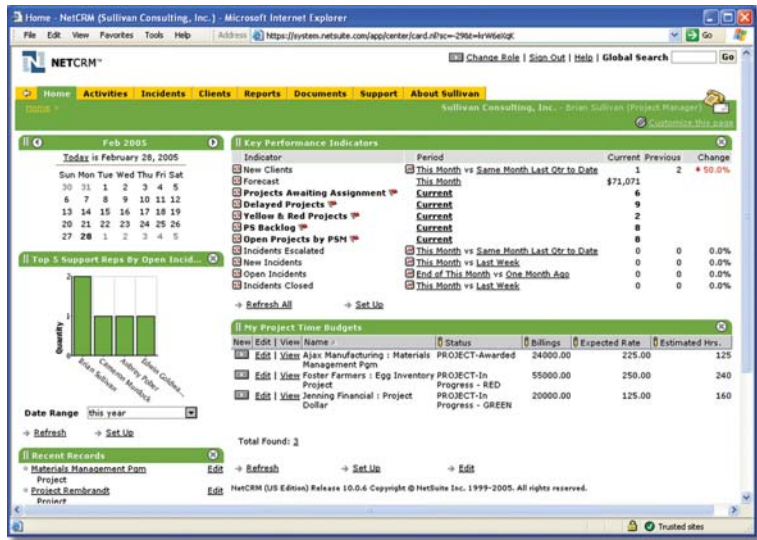
### NetSuite Launches NetCRM-Services Edition

NetSuite, Inc., ([news](#) - [alert](#)) a provider of integrated business application software for small and medium-sized businesses, has launched NetCRM-Services Edition. Designed to meet the specific needs of services-based businesses, the services edition offers service-specific features in a stand-alone, on-demand CRM application. These features consist of service item management, project/job tracking, client self-service center, advanced activity and time tracking, and document management, in addition to traditional CRM functionality (including marketing campaign management, client support and opportunity management).

In conjunction with NetCRM's advanced customization capabilities, NetCRM-Services Edition is aimed at giving service companies the flexibility and power to cater the feature-rich application to meet their exact needs. When deployed as part of the complete NetSuite ERP/CRM solution, services-based businesses can go from proposal to invoice in a single integrated solution.

NetCRM builds all data around a client record, as opposed to traditional CRM systems that are more deal-focused or opportunity-focused. This enables ongoing projects and new projects to be tracked as part of the ongoing client relationship. Secondly, NetCRM-Services Edition adds features that are specific to the needs of services companies, features such as job/project tracking and advanced activity time tracking. NetCRM-Services Edition also adds new dashboards for service personnel, with key performance indicators and report snapshots specific to them.

NetCRM-Services Edition is now easier to customize to industry functionality of vertical markets such as financial services, consulting services or legal services. <http://www.netsuite.com>



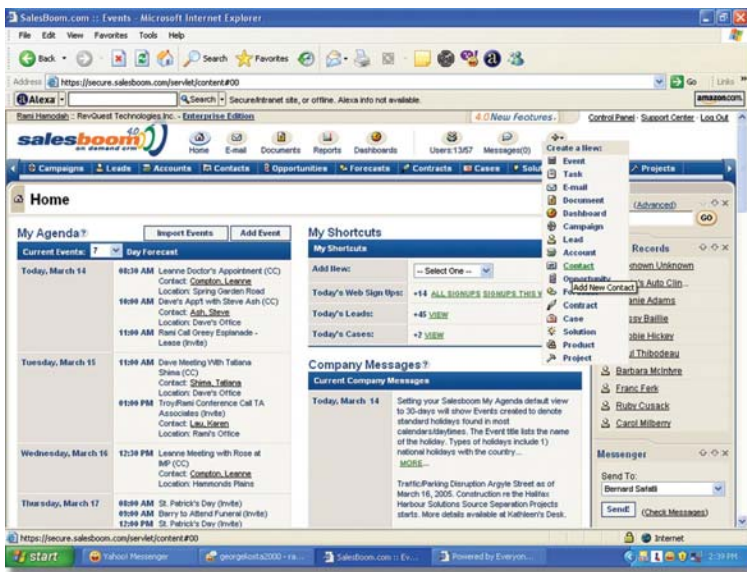
### Salesboom.com Announces Customizable CRM Application With v5.0

Salesboom.com, ([news](#) - [alert](#)) a provider of on-demand CRM and sales force automation (SFA) services, has announced the pending release of its Salesboom Customizable Edition, which provides a wider range of broad customization abilities to its existing Professional and Enterprise Editions, directly from the user interface. New with this version's release, the on-demand customizable CRM application will allow end users to create new modules within the application, as well as to change existing predefined tabs, allowing businesses of any type to store relevant, custom information that is critical for their business process. The new customizations edition, slated for release in the coming weeks, will be deployed instantly and transparently to all existing Salesboom.com customers via the Internet.

Allowing users to customize the application completely, directly from the user interface, the Salesboom.com Customizable Edition is intended to give each organization the ability to "tailor-make" a CRM/SFA application for its individual needs. The Salesboom interface is designed to easily change many of the application's core features, such as tab layout and data field design. Any organization will be able to add new features into the system, with a variety of options to store unique data types.

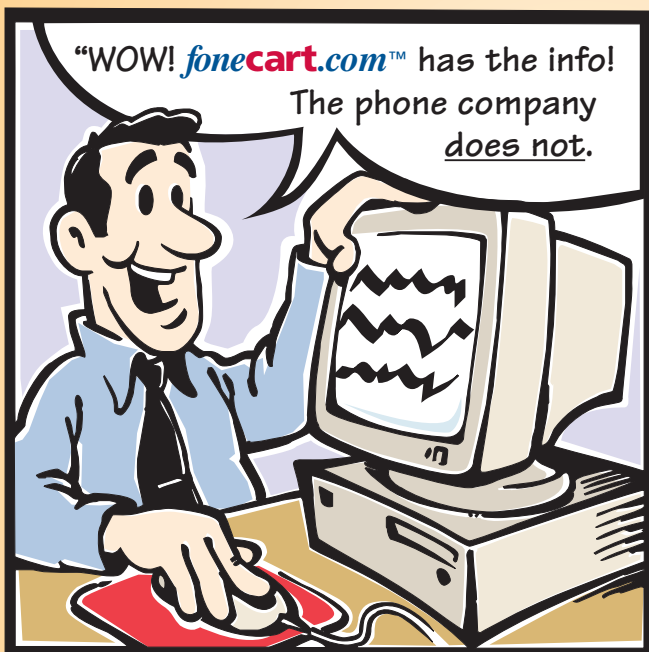
"The Salesboom offering is designed to grow with the customer, not have the customer outgrow the application," said Salesboom President and Co-founder Rami Hamodah. "By allowing businesses the ability to completely customize the application, we're providing a foundation which will foster and facilitate growth, all while keeping a very accessible price point for the true [SMBs], which our competition seems to have forgotten about."

The Salesboom.com Customizable Edition is slated for release pending further testing. <http://www.salesboom.com>



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**Salesforce.com Previews Summer '05 Release, Premieres Multiforce Application Environment**

Salesforce.com, ([quote - news - alert](#)) a provider of on-demand CRM, has announced new customization capabilities, including the Multiforce application environment, that will be offered as part of the company's Summer '05 release.

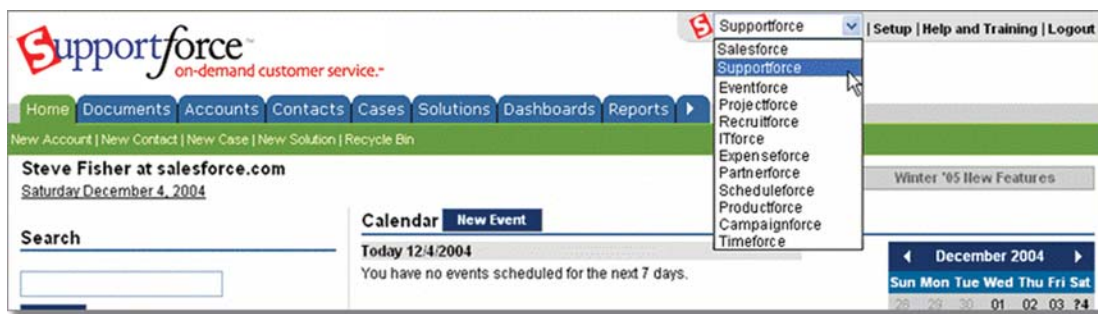
At the core of the upcoming release is the new Multiforce application environment, a feature that allows Salesforce subscribers to multi-task between multiple on-demand applications — all running in the same Salesforce environment — with a single click.

Multiforce will extend the range of salesforce.com's vision of on-demand computing, from running CRM to powering all of a business' on-demand applications written for the company's platform. With Multiforce, companies will be able to use the same data model, security system and user interface for any on-demand application built by customers or partners for the sforce platform and with the Customforce tool. Multiforce is intended to eliminate "data silos" and deployment issues that have traditionally plagued enterprise application efforts.

Multiforce will be a significant extension of the capabilities of Customforce, which was formally announced on November 2, 2004. The new technology is intended to add more force to the momentum of Customforce, salesforce.com's point-and-click customization tool.

The upgrade is targeted for release to all 227,000 subscribers and 13,900 customers in June.

<http://www.salesforce.com>



**Telephone Systems & Software**

**AePONA "Telecom-Enables" Web Services**

AePONA Ltd., ([news - alert](#)) a provider of open telecommunications operating systems, has announced the company's Causeway Carrier-Network Operating System now supports the Parlay-X standard, allowing Web services to be "telecom-enabled" for the first time. With AePONA Causeway, mobile operators have the ability to roll out new hybrid telecommunications services that were never before considered possible and to provide subscribers with access to a much wider array of services.

"AePONA's support for Web Services and Parlay-X opens the door to more mobile services being enabled through the Microsoft Connected Services Framework — resulting in a lower cost of development, deployment and management, a better portfolio of services, and new revenue-generating opportunities," said Terry McGuigan, product manager for the Microsoft Connected Services Framework.

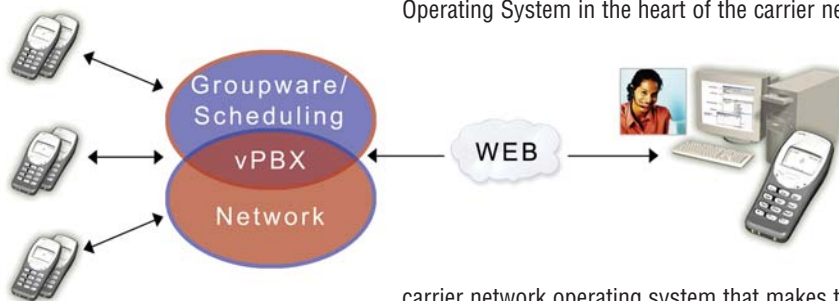
The AePONA Causeway Parlay gateway allows operators to roll out approved third-party services through Parlay-X Web Services application programming interfaces within the carrier network. With Web services supported, many more applications will be made available that cater to the individual wants of different customers, including enterprise workforce efficiency.

AePONA Causeway is an OSA Parlay/Parlay-X gateway that establishes a Carrier-Network Operating System in the heart of the carrier network. This acts as an integration backbone

between service creation and network resources. In the past, operators developed new services and applications using specialist developers with knowledge of proprietary telecommunications systems. AePONA Causeway sits at the heart of the carrier network and provides an integration backbone between the world of IT and telecommunications. AePONA Causeway is a new breed of

carrier network operating system that makes the complexity of telecoms and IP services easier for the world of IT and Web services.

<http://www.aepona.com>



### Nortel To Increase Operator Revenue Potential With New Converged Mobility Solution

Nortel ([quote -news - alert](#)) has announced a CDMA WLAN Converged Mobility solution designed to bridge CDMA wireless networks and wireless local area networks (WLANs) to provide a seamless communication experience to end users. This solution will allow CDMA operators to extend the reach of cellular 3G networks and to deliver services more cost-effectively by leveraging WLAN networks.

The solution will allow the operator to deliver a consistent communications experience between CDMA and WLAN networks; it will allow end users to roam seamlessly between these networks and enjoy SIP-based services beyond voice, including video calling, video conferencing, short messaging service, instant messaging, e-mail, Web access and other multimedia services — all from one device and one

phone number. It will also manage subscriber billing information across networks so that end users can receive one consolidated bill.

Nortel's WLAN CDMA Converged Mobility solution is intended to decrease operator costs by allowing the operators to use

WLAN access points as an option to deploying CDMA base stations and carriers. Operators can leverage existing Nortel platforms to quickly deploy the solution.

Nortel will be conducting live market trials globally with operators across the globe later this year.

<http://www.nortel.com>

### Volo Announces New Suite Of Advanced Network Services

Volo Communications, ([news - alert](#)) a provider of advanced voice and data services, has announced its new AccessNOW suite of advanced network services that enable both IP and TDM facilities-based carriers and service providers to provide IP (SIP, H.323, etc.) and TDM communications-based services without adding hardware or network builds. This new service allows for seamless TDM-IP unification using Volo's nationwide MPLS-based VoiceOne network.

The AccessNOW solution can resolve interoperability issues that have plagued the industry while providing a stable network that reduces carriers' operational and support costs. Some of the features include the following: TDM-IP mediation; IP control; Voice IP endpoint migration (VEM); nationwide reach; and customer-specific routing (CSR).

One of the differentiating and proprietary features is a service called Virtual Switch Extensions (VSE) that offers both existing IP and TDM carriers the ability to provision and mediate services nationwide without the capital cost. VSE gives carriers control of their customers' switching features and enhanced services.

<http://www.volocommunications.com>



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**Compliant Solutions Unveils Browser-Based Compliance Management Tool**

**Compliant Solutions, LLC** ([news - alert](#)) has introduced Compliant 1.0, a browser-based auditing tool designed to increase the efficiency and effectiveness of an organization's compliance efforts, particularly Sarbanes-Oxley compliance. Compliant is more than just a document management tool or generic database that has been repurposed to capitalize on Sarbanes-Oxley; it was built specifically for controls auditing and it brings structure and efficiency to the audit process. While Compliant was designed to meet Sarbanes-Oxley requirements, it is adaptable enough to assist organizations with all of their compliance efforts.

Compliant comes complete with an intuitive user interface that was built with flexibility in mind. Each customer, regardless of the industry, business processes or external audit firm, is able to structure the tool to meet its unique requirements.

Compliant tracks every aspect of the company's controls in accordance with the requirements set forth by the government and standard-setting agencies. The tool comes complete with online templates for all controls documentation and testing activities. Behind these templates lies a relational database that allows for quick and easy reporting on any fields selected. Also, with Compliant's reporting engine, management can more easily report on any aspect of the control environment, creating *ad hoc* reports that can be sorted, grouped and filtered as needed.

Compliant is offered in both hosted and self-managed formats. Additional service offerings include on-site training, data conversion services and custom development. <http://www.compliant.com>

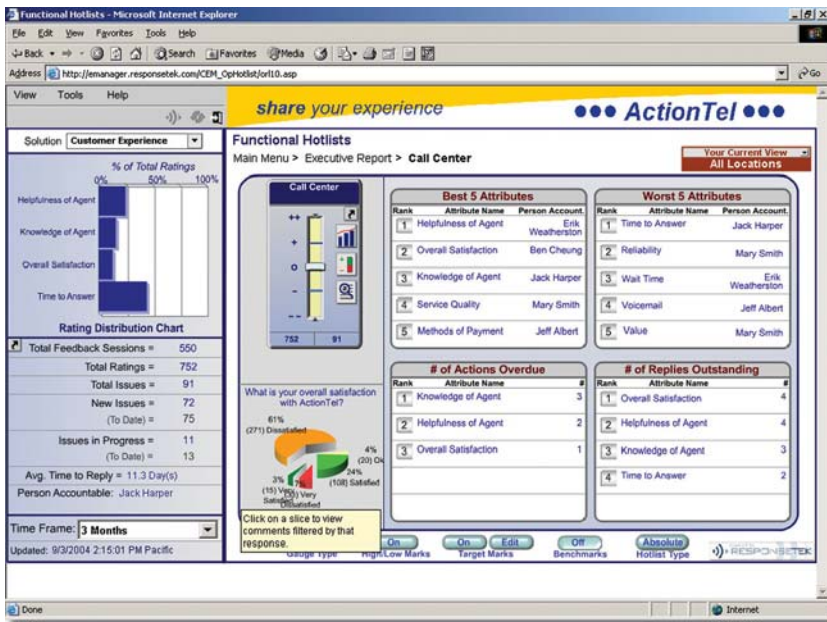
**ResponseTek Debuts Contact Center Solution**

**ResponseTek Networks Corp.**, ([news - alert](#)) a supplier of customer experience management (CEM) solutions, has announced its Contact Center solution, an integrated software offering with IVR capabilities for improving agent service quality and organizations' product and service offerings based upon direct, quantitative customer feedback. ResponseTek Contact Center enables organizations to capture 100 percent of customer feedback on interactions with agents; it then routes the quantitative feedback directly to those agents and contact center management for service quality improvement. It provides contact centers with an understanding of the customer's experience with the agent rather than traditional metrics, such as length of calls that focus on reducing costs.

"With ResponseTek Contact Center, the customer voice can immediately become an actionable measure of success that impacts overall revenue. It also brings invaluable intelligence garnered from the contact center into the rest of the organization," said Syed Hasan, ResponseTek president and CEO. "Our strategy is to provide a complete CEM solution that impacts revenue through consistent and continuous service quality improvements."

The new IVR capability is intended to help quality-driven firms increase revenue and profits. ResponseTek CEM can reduce customer turnover by monitoring, managing and continuously improving the experience of an organization's key stakeholders (i.e., customers, employees, vendors and other stakeholder groups). With the new IVR feature, ResponseTek CEM provides a complete set of touch points, including the Web, IVR, wireless devices and kiosks, enabling ResponseTek clients to collect crucial customer feedback from every interaction in the most convenient and appropriate manner.

<http://www.responsetek.com>



**PM Solutions Updates Web-Enabled Project Management Methodology**

**PM Solutions**, ([news - alert](#)) a provider of project management consulting, training and research, has announced availability of the latest version of its Web-enabled Project Management Community of Practice (PMCOP) methodology solution, which aligns with the latest industry standards contained within the Project Management Institute's (PMI) PMBOK Guide 3rd Edition. The PMCOP gives Global 2000 organizations one source for hundreds of "easy-to-follow" forms, templates, practices and guidelines that can be applied immediately for improvement of project execution and operational efficiency.

PM Solutions' Project Management Community of Practice (PMCOP) supports the active use of repeatable processes across all projects within an organization. Having a standard process in place for managing projects can accelerate project start-up time, increase project speed and make project results more predictable.

PM Solutions' updated PMCOP is intended to be easy to use, customizable and scalable. The PMCOP brings practical best practices, templates, guidelines and reference materials directly to an organization's grasp. It can define project management roles and responsibilities, and it features a glossary with the definitions of nearly 400 key project management terms. Its interface requires minimal user training and is adaptable to integrate with a company's intranet or existing project management software. It also features full search capabilities, a software development project handbook and an integrated knowledge center.

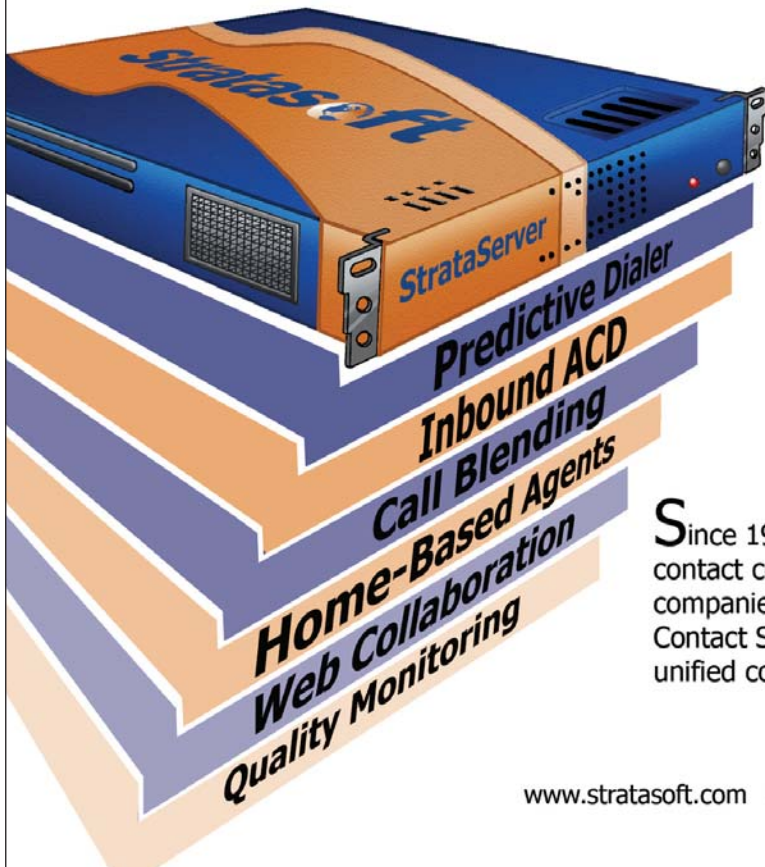
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**New Empirix Solution Tests VoIP Infrastructure/Applications**

Empirix Inc. ([news - alert](#)), a provider of integrated test and management solutions for VoIP, contact center and Web environments, announced in early February a comprehensive solution for ensuring successful deployment of enterprise VoIP infrastructure and applications. The Hammer VoIP Test Solution for Enterprises is aimed at allowing enterprises to reduce risk and speed the rollout of VoIP services and IP telephony applications (such as messaging, speech self-service, conferencing and CTI) by accurately assessing how their infrastructure and applications will perform as a live, enhanced IP service.

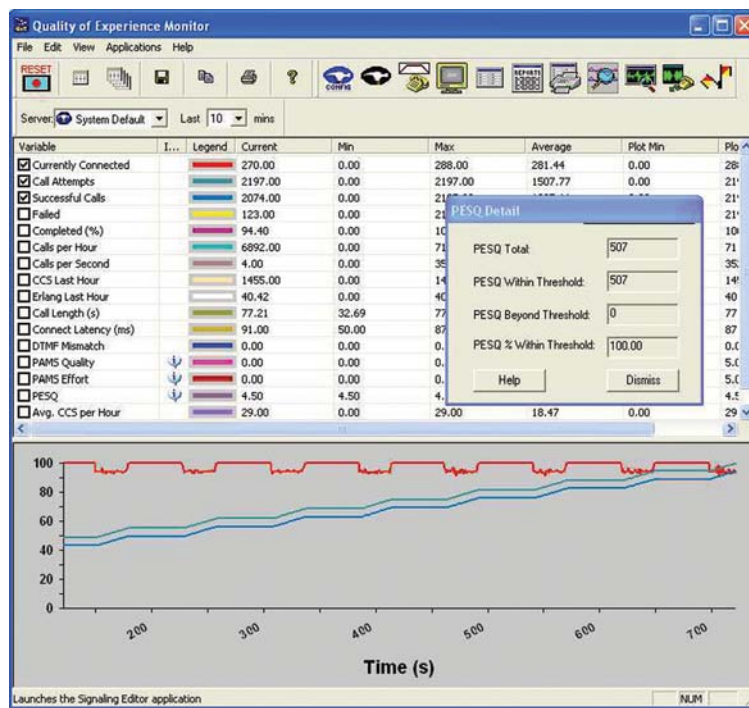
By enabling enterprises to test applications running on VoIP networks in their own environments, Empirix provides a comprehensive approach and the capability for enterprises to perform upgrade and migration testing on an ongoing basis. In addition, Hammer VoIP Test Solution for Enterprises can be used to analyze and troubleshoot both pure VoIP networks and hybrid IP/TDM environments.

The Hammer VoIP Test Solution is comprised of three elements:

- Hammer FX-IP, a feature test platform for IP environments that generates test IP calls and evaluates voice quality;
- Hammer CallMaster, a graphical scripting and reporting tool for creating test call flows; and
- Hammer Call Analyzer, a diagnostics and troubleshooting solution that enables users to visualize and debug signaling and voice quality problems in VoIP networks.

Organizations that need to test converged IP/TDM environments can add Hammer FX, which generates test TDM calls. Existing Empirix customers who are migrating from TDM to VoIP and already have Hammer FX and Hammer CallMaster need only add Hammer FX-IP for generating IP test calls and Hammer Call Analyzer for diagnostics and reporting.

<http://www.empirix.com>



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**Loquendo, Kirusa Announce Strategic Partnership, Deliver Multimodal Solutions**

Loquendo, ([news - alert](#)) a global speech technology company, and Kirusa, ([news - alert](#)) a provider of multimodal platforms enabling wireless applications delivery, have announced a strategic partnership leveraging Loquendo's multilingual speech technologies to deliver enhanced multimodal solutions to customers across the globe. The partnership between Loquendo and Kirusa is aimed at enabling carriers and enterprises to offer users a richer multimodal experience by introducing quality voice services that drive customer loyalty and new revenue generation.  
<http://www.kirusa.com>  
<http://www.loquendo.com>

**MCI, Tellme To Deliver Internet-Based Contact Center Solutions**

MCI, Inc., ([quote - news - alert](#)) the global communications provider, has announced an agreement with Tellme Networks, Inc., ([quote - news - alert](#)) a voice application provider, to offer Internet-based contact center solutions to large enterprise customers in financial, insurance and healthcare industries, as well as in the government sector.

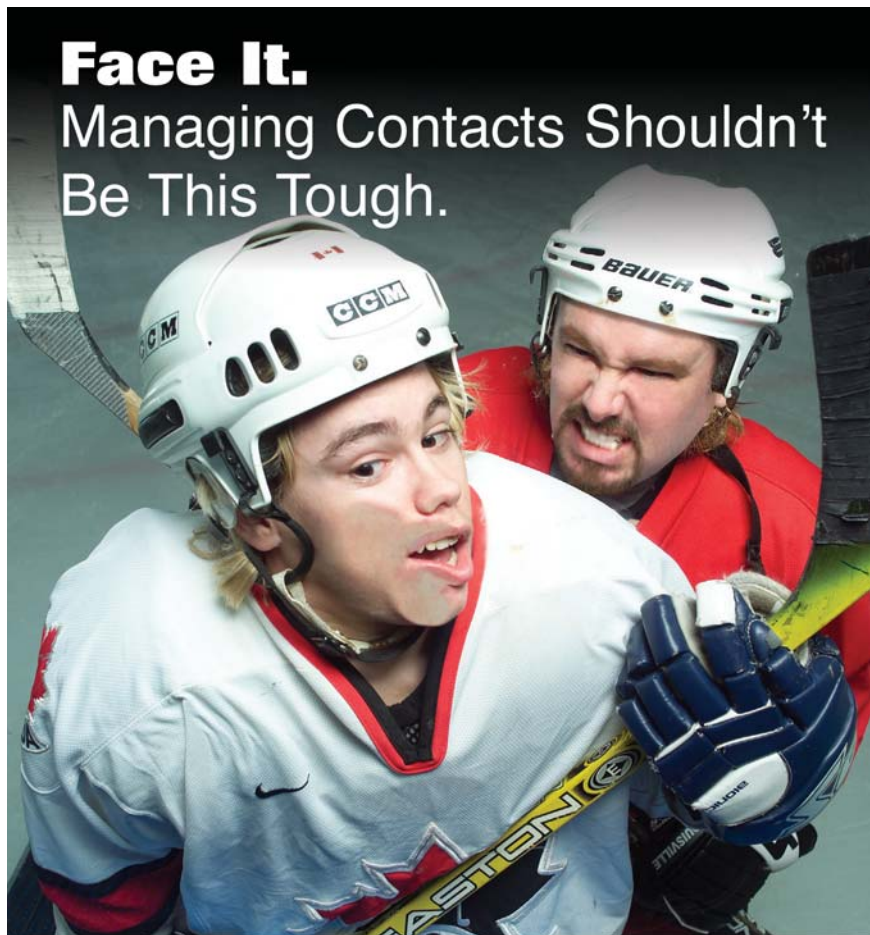
The two companies are now jointly selling customer self-service solutions running on Tellme's network and integrated with MCI's routing platform for live agent support. This combination means MCI customers can take advantage of Tellme's Internet-based and carrier-grade network to power their customer service phone numbers.

<http://www.mci.com>  
<http://www.tellme.com>

**Mercom's Audiolog Now Supports SIP Call Recording**

Mercom Systems, Inc., ([news - alert](#)) a provider of multimedia recording and evaluation contact center tools, has announced its Audiolog call recording server now supports call recording for SIP environments. Mercom's SIP-interface VoIP recorder is designed to provide cost-effective software-only and turnkey recording solutions for SIP-enabled IP telephony contact centers.

Mercom offers a comprehensive recording, evaluation and analysis suite for all IP telephony environments, including SIP-enabled contact centers.  
<http://www.mercom.com>

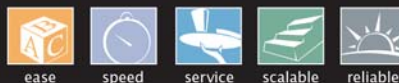


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### Nortel Makes Senior Management Changes

**Nortel Networks Corporation**, ([quote - news - alert](#)) a provider of technology solutions encompassing end-to-end broadband, VoIP, multimedia services and applications, and wireless broadband, announced that its Board of Directors has made senior management changes. **Bill Owens**, president and CEO, will continue to drive the strategic direction of the company while dedicating new senior executive talent to Nortel's global operations and related functions.

Owens became the vice chairman and CEO effective March 14, 2005. The company further announced the appointment of **Gary Daichendt** to the position of president and COO reporting to Owens. **Peter Currie**, who was appointed CFO effective February 14, 2005, will become executive vice president and CFO effective March 14, 2005.

Owens has also been appointed vice chairman and CEO of **Nortel Networks Limited**, the company's principal operating subsidiary. Daichendt has been appointed president and COO, Currie as executive vice president and CFO, respectively, of Nortel Networks Limited.

<http://www.nortelnetworks.com>  
<http://www.nortel.com>

### Smartner Makes North America Debut

**Smartner**, ([news - alert](#)) a provider of carrier-grade mobile e-mail and office solutions, has announced its debut in North America. Smartner offers Always-On Mail, a suite of real-time e-mail applications for mobile operators and enterprises, enabling mobile workers to fully interoperate with their desktop e-mail, PIM and calendar functions of Microsoft Outlook and Lotus Domino via ubiquitous cellular smartphones. Smartner is entering the North America market with the carrier-grade product and several partnership announcements with **Nokia** ([quote - news - alert](#)) and **Sony Ericsson** to ship Smartner on handsets distributed throughout North America. Smartner is also partnered with **IBM, Sun Microsystems, Microsoft, Oracle, Palm Source** and **Symbian** to ensure interoperability with their enterprise applications.

<http://www.smartner.com>

### Vocomo's VoiceXML IVR Starter Kit Available For A Limited Time

**Vocomo Corporation**, a provider of next-generation IVR systems, has announced immediate availability of its new VoiceXML IVR Starter Kit, which enables IVR developers to provide quick-to-market phone-automated services. Vocomo supports VoiceXML, ASP.NET, JSP and other common Web technologies for building IVR solutions.

The IVR Starter Kit is available for a limited time.

<http://www.vocomosoft.com>

### SPiRiT Offers Free Trial Version Of TeamSpirit, Multipoint IP Conferencing

**SPiRiT**, ([news - alert](#)) a provider of embedded software products for the telecom industry, has announced its offering of a free trial version of its Multipoint Conferencing via the TeamSpirit Voice Engine. TeamSpirit Voice Engine enables users to have voice conferences simultaneously with dozens of other users participating in a conference. It doesn't matter how many participants take part in the conference — their speech still remains clear and easy to understand even during simultaneous talk.

Contact SPiRiT and ask for a free trial.  
<http://www.spiritdsp.com>

### Unveil, ScanSoft Partner To Deliver Speech-Enabled Call Center Applications

**Unveil Technologies, Inc.**, ([news - alert](#)) a provider of speech application management software for call centers, recently announced it will support and offer **ScanSoft** speech solutions with the Unveil Conversation Suite. ScanSoft is a provider of speech and imaging solutions. The Unveil Conversation Suite is a speech application management environment that enables enterprise call centers to rapidly build, deploy and maintain high-performance speech applications.

Unveil's support of ScanSoft speech solutions is aimed at ensuring call centers have the software systems they need to rapidly develop sophisticated speech applications for automating conversational call routing, information requests and transactions. As part of this agreement, Unveil and ScanSoft will be working with existing IVR platform partners to support integrated solutions and services.

<http://www.unveil.com>  
<http://www.scansoft.com>

### SugarCRM Launches Online Destination For Community Collaboration

**SugarCRM Inc.**, a provider of commercial open-source CRM applications, has announced the establishment of SugarForge.org, a destination for community collaboration on Sugar Suite extensions, modules, language packs and themes. SugarForge.org is aimed at empowering the community to leverage the combined ideas of developers around the world by offering the toolset and location to both manage and distribute new community-developed Sugar extensions to the benefit of all Sugar users.

SugarForge.org offers a range of support for those who need assistance with Sugar Suite development or implementation.

SugarForge.org's architecture, project management and repository capabilities enable users to collaborate, contribute, develop and access Sugar Suite extensions; the "community" offers every user a single source to access project contributions, top project listings, project tree management, community member insight, code snippets and project openings related to the Sugar Suite.

SugarForge.org is facilitated and managed by SugarCRM Inc. The collaborative environment can be found at

<http://www.sugarforge.org>  
<http://www.sugarcrm.com>

**Toshiba Ships New Strata CIX Pure IP Telephony System**

**Toshiba America Information Systems Inc.**, ([quote](#) - [news](#) - [alert](#)) **Digital Solutions Division (TAIS DSD)** has announced it is shipping its new Toshiba Strata CIX pure IP business communications system. Originally slated to ship near the end of January (as stated in *Customer Interaction Solutions'* January 2005 Technology Highlights), Strata CIX is designed for SMB enterprises or larger corporate users with multiple sites. It supports up to 192 ports (up to 672 ports coming soon), offers new FeatureFlex capabilities, can be TDM-enabled and provides a smooth migration path from Toshiba Strata CTX and Strata DK digital business communication systems.  
<http://www.toshiba.com>

**VanillaSoft To Integrate Do-Not-Call Service In Web-Based B-to-C CRM/SFA Software**

**VanillaSoft Inc.**, ([news](#) - [alert](#)) a provider of Web-based sales force automation service, has announced it will integrate TeleBlock, **Call Compliance, Inc.**'s patented Do-Not-Call Screening and Blocking System, as part of the company's Web-based sales automation platform.  
The strategic partnership between VanillaSoft and Call Compliance is aimed at providing VanillaSoft's clients the ability to instantly screen and block their outbound calls against all do-not-call lists via VanillaSoft's Internet browser-based technology. VanillaSoft's capabilities enable companies across the globe to gain efficiencies in customer acquisition and sales lead programs, while ensuring absolute do-not-call compliance.  
<http://www.vanillasoft.com>    <http://www.callcompliance.com>

**VoiceLogger Changes Corporate Name To Davacord**

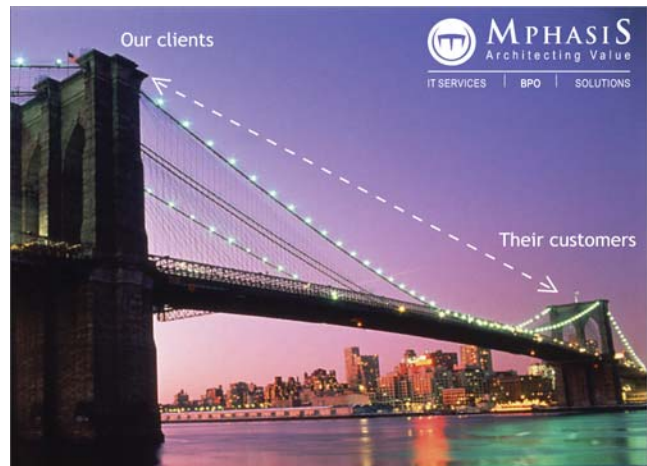
**VoiceLogger, Inc.**, ([news](#) - [alert](#)) a provider of converged call recording and quality monitoring solutions, has changed its corporate name to **Davacord**. Davacord, which is a contraction of the words "digital and analog voice recording," is claimed by company representatives to better represent the company's commitment to provide newer and broader solutions in direct response to customer needs.  
"We saw the name VoiceLogger as a generic term for a subset of our product functionality," said Jon McNaught, Davacord president and CEO. "As Davacord, we remain firmly committed to maintaining the exceptional leadership and customer focus that has been our trademark in this industry."  
<http://www.davacord.com>

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- Targeting Speech to Midmarket Companies
- Call Center Apps Panel
- Bringing Speech Technologies to the Enterprise
- Achieving the Right Mix in Customer Care: The Role of Speech in  
Enterprise Business Solutions
- Improved Call Completion with Natural Language Processing
- Fighting Fraud and Identity Theft Using Voice Authentication
- Optimizing IVR/Speech Using Customer Behavior Intelligence
- At Your Service: Accelerate Contact Center ROI with Voice Self-Service

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- Fully Mobile Office Evolution: Technology Drivers and Solutions
- Building Applications with Alternative User Interfaces—Visual,  
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- Integrating IP Contact Centers Into a Microsoft-Centric Environment
- Using IP Technology to Build a Blended Contact Center Solution
- Premise-Based Versus Hosted: What Makes Sense for the  
Contact Center
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the IP Telephony Network

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- Establishing Internet Telephony and VoIP Services to  
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- VoIP Regulation: Challenges and Opportunities
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# Virtual Contact Management:

## An Alternative Route To CRM

Think about the last time you called your bank, tech support or a catalog. Unless you are a preferred customer, your experience may not have been as pleasant as you had wished.

You may have endured poorly designed IVR ([define](#) - [news](#) - [alert](#)) menus that make your fingers go numb from stabbing the telephone touchpad, or you may have been forced to speak like you're chatting to a two-year-old. The live agent zero-out is hard to find or is nonexistent.

You are put on eternity hold for live agents. Or after a few minutes with one, he or she informs you that you need to talk to a supervisor or to another department — and so your call is transferred and the process starts anew.

Now recall the last time you dialed your doctor after hours because your child was running a fever. Or remember when the new toilet you put in over the weekend forced you to go to your back-up plan, i.e., calling the plumber. Or think of when you called your attorney's office on a holiday or after hours with a question.

Remember how these calls were handled, with those calm, courteous voices that listened and asked a few questions. Their quick responses, such as taking a message, scheduling an appointment, opening a trouble ticket, providing a number to call, paging a professional or patching you through to the right person, probably made you feel you were getting the service you needed.

What you experienced in the second instance (i.e., when calling the doctor,

plumber or attorney) is virtual contact management (VCM). VCM is the evolution of traditional telephone answering services (TAS). VCM couples sophisticated contact center technology with traditional telephone answering services to provide a complete range of multimedia contact management services.

VCM ([define](#) - [news](#) - [alert](#)) is the alternative route to customer relationship management (CRM). It turns traditional contact center customer handling, such as when reaching a bank, catalog or tech support in the first set of instances, on its head.

The heart of CRM ([define](#) - [news](#) - [alert](#)) methodology is the mistakenly called "Pareto Principle," which states that 20 percent of customers produce 80 percent of the value, otherwise known as the "20/80" rule.

Yet instead of making the 80 percent go through IVR first and then zero-out to live agents, VCM first has all calls answered by live agents, who then triage the inquiries and give callers a range of options depending on their value. These include no-wait IVR response; offers to visit a Web site; hot-transfer to professionals who can help them if they are

available; setting appointments; voice mail; and paging.

The virtue of VCM in CRM is that it recognizes that people prefer to talk to people. Those agents who answer the calls not only identify the callers but make that personal connection between them and the enterprise.

VCM allows cost-saving methods, such as IVR, to shine. Buyers are more willing to "talk" to a computer because either they initially spoke to a person or the IVR has perfectly responded to the need. Imagine being able to opt in to an IVR that you know will help you prior to you hitting the first button.

The information that VCM-enabled agents gather from customers facilitates targeted offers, better service and better retention through discovering issues. That is also key to CRM.

VCM slices handle time and costs by quickly finding out what callers are inquiring about, asking simple questions, entering issues and orders online and directing customers to the correct people.

VCM is also the best answer to handling the e-mail deluge while lowering response times and hiking customer retention. Live agents sort through inboxes and deleted folders for sales leads, service questions and other urgent messages that would have been lost or discarded by spam filters. VCM Web chat engages site visitors in the sales

By Gary A. Pudles  
The AnswerNet Network



process that you may have otherwise missed.

**The Limitation Of Traditional CRM Delivery**

There are powerful reasons for organizations that sell or provide services through traditional contact center delivery, in-house or outsourced, to take the VCM road instead.

Despite massive investments made by contact centers in new and upgraded PBX ([define - news - alert](#)), ACD ([define - news - alert](#)), CTI ([define - news - alert](#)), IVR and contact management solutions, many customers still do not like the service that contact centers provide. Those results show up in customer satisfaction surveys, call monitoring, complaints, bad press and possibly (though not always) in declining sales and revenues.

As one of many such examples, Connell Associates reported in 2004 that nearly 45 percent of respondents were dissatisfied with their customer service. The number climbed to over 60 percent for Web service and 70 percent for IVR self-service; 59 percent found IVR frustrating to use.

Here's the rub: determining who is a "top 20" or a "bottom 80" in CRM methodology is an inexact science. The technology tools cannot predict variables that affect buying patterns. These are changes in need, in likes/dislikes, and in disposable income such as promotions, demotions, new jobs and layoffs, marriages, births and deaths.

What can be predicted is that many of those customers who are "bottom 80s" may tell an organization to get lost when they become eligible to be "top 20s" if they disliked the service they had received. They will spend more of their new money elsewhere.

Also, it still takes considerable time, money and commitment to do traditional contact center CRM right. Tools such as advanced speech recognition (e.g., the system behind Amtrak's "Julie") are expensive and require installation and debugging. These products are generally beyond the resources of small and

medium-sized enterprises (SMEs).

To cut traditional contact center-handled CRM costs and improve customer service, many contact centers have been shifting customer handling offshore.

Yet in too many instances, offshoring has worsened customer relations and retention because foreign agents often do not have a cultural affinity with Americans. Cost savings have turned out to be less than forecasted because misunderstandings have lengthened call times. There are reportedly more repeat calls and escalations to United States contact centers; hence the high-profile repatriation of contact centers by Dell's business arm and by Lehman Bros.

Most offshoring work has been for high-volume calls from larger companies. The program's involved setup, training and management complexities preclude SMEs from locating or outsourcing offshore.

These factors — highly problematic contact center technology implementation costs and offshore challenges — may be blessings in disguise for SMEs.

By going the VCM route, they can obtain critical customer service advantages while ensuring that cost-saving methods, such as IVR, are correctly deployed. That's key to their survival against their bigger competition.

Contractors and professionals have long relied on VCM, especially after hours, when many of their most urgent calls come in. If they did miss those urgent calls, the results would truly be catastrophic all the way around.

**The Virtual Contact Management Approach**

VCM ([define - news - alert](#)) delivers better-quality service because agents establish instant rapport with customers by listening and responding to their needs. The basic VCM tasks are straightforward: answering the contacts; asking questions; capturing messages; and, if need be, warm transferring the customers. Training is thorough, and agents are monitored for quality assurance. The agents are skilled in multi-

**Contractors and professionals have long relied on VCM, especially after hours, when many of their most urgent calls come in.**

tasking, quick thinking and typing, with the ability to work well under pressure.

Yet VCM can also include complex tasks, such as order entry and first-level help desk, also requiring additional training.

Consequently, the work for contact center agents is varied and interesting, which keeps employees motivated and prepared. The switch can fire them a simple TAS call or e-mail one minute, and then a five-minute customer service e-mail the next.

VCM enables more contacts to be processed. A simple call, wherein agents identify callers and direct them to someone or to a system to best help them, takes a mere 45 seconds and 60 seconds.

Yet because VCM agents screen contacts and direct them into self-service, voice mail and messages, escalations are minimized, which cuts costs by making better use of the marketing, sales or IT professionals' time. Having leads, service requests and appointments delivered to them avoids repeating the same questions or filling out forms when they talk to customers.

Total talk time is less because multiple escalations, long queues and IVR drill times before zeroing out are avoided. Both you and the customers win.

Because VCM also incorporates basic contact center functionality, these agents can take on tasks such as cross-selling/upselling, outbound customer care and telesales.

VCM applications can be networked across multiple contact centers. You can employ skills-based routing. The same traditional methods are still able in VCM: touch-tone selection of language preference on the auto-attendant or support for special DID numbers.



The technology required to support VCM is affordable, rugged, proven and scalable. There are vendors that have long supplied switches that support TAS and voice mail as well as contact center applications. Because the actual interactions are short and simple, IVR specifications and programming requirements are also less expensive and less complex.

### Enabling VCM

VCM implementation is relatively easy, in theory. Most organizations already have some VCM in place for their administrative functions that are triaged by their front-desk receptionists.

These individuals undertake the same tasks that VCM agents carry out. They answer, triage and direct people and calls. When that person goes home, these calls are often outsourced to answering/telemessaging service bureaus. This model is then easily moved to customer service and order processing.

If and when an enterprise decides to shift its contact handling from a traditional model to the VCM model, there are several factors to consider.

There is a wider and less predictable range of call lengths and volumes that must be planned for. They can include the messaging call, online appointment scheduling, order processing, trouble ticket interaction, or e-mail response and chat.

Also, existing contact centers may not be set up or have the right tools to efficiently process and measure VCM, so equipment investments are very important.

The centers' switches must have scripting, voice mail, paging and multiple-message retrieval options that include e-mail, fax, PDA and phone to support VCM. This is in addition to automatic call distribution and reporting. Call recording is a must, both to protect enterprises if disputes arise and to check on contact center agent performance.

Outsourcing to service bureaus that have TAS/VCM equipment as well as traditional contact center experience is a

viable option to in-house VCM program setup management.

These firms provide after-hours handling, flexibility and expertise at affordable prices. They are Web-enabled to supply services such as online order entry and e-mail response. They have IVR, auto-attendant and the ability to link their contact centers' databases into those of clients' for seamless CRM.

These bureaus know TAS and messaging extremely well, and they have successful contact center teams. A few of these vendors have multiple networked locations that add capacity and provide disaster backup.

There are many qualified service providers. There is also a professional development organization, the Association of TeleServices International (<http://www.atsi.org>), which sponsors a rigorously judged awards-of-excellence program. ATSI, founded in 1942, is the grandfather of all contact center organizations.

When planning a VCM strategy, look at and test IVR diversion rates. You may find more people willing to use IVR if they first spoke with a live agent, thereby reducing staff demand and costs. No matter how an enterprise delivers VCM, whether with in-house contact centers or through a qualified outsourcer, it will find the CRM route worth the trip. **CIS**

*Gary A. Pudles is the founder and CEO of the AnswerNet Network. Pudles was formerly vice president and general counsel of Apex Site Management, the U.S.'s largest telecommunications real estate management firm. He was manager of real estate for American Personal Communications, the first operational PCS network in the U.S. The AnswerNet Network, founded in 1998, is a supplier of outsourced contact center services including telemessaging (telephone answering and voice mail), customer service, help desk, telemarketing and fulfillment. It has over 1,600 seats in 53+ contact centers across the U.S. and Canada.*

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# CUSTOMER INTER@CTION Solutions® Magazine's Twentieth Annual Top 50 Inbound Teleservices Agencies Ranking

This is the twentieth year *Customer Inter@ction Solutions* magazine brings you its "Top 50" Teleservices Agency Ranking. In this issue, we're presenting the "Top 50" inbound portion of the ranking. (The outbound portion of the ranking was highlighted in the March 2005 issue.) Since its inception in 1986, our "Top 50" ranking has been used as *the* benchmark for choosing large-capacity/sized teleservices agencies.

## Ranking Basis

Because the basis of our ranking is company size, *Customer Inter@ction Solutions* uses a measurable, *third-party-verifiable* aspect of teleservices to arrive at our list of the "Top 50" agencies: *the number of minutes each agency was billed* by each of its phone companies for telephone service for 12 months, encompassing November 2003 through October 2004. We have found this to be an accurate and reliable reflection of the amount of teleservices each agency does, and therefore, provides a true reflection of its size.

## Qualification Criteria

To qualify for inclusion in this year's "Top 50," the agencies had to answer a questionnaire detailing the nature of their business and listing their number of billable minutes between November 2003 and October 2004. The questionnaire had to be verified with the signature of each agency's president/CEO. In addition, each agency had to submit a letter of verification from each of its telephone service providers certifying the number of minutes for which it billed the agency during the designated period. (Our sincere gratitude is extended to all the carriers for their thorough and expeditious provision of these data.)

## Exceptions

Agencies that did not supply this third-party verification were disqualified, with the exception of three circumstances: 1) a client of the service agency was billed directly for its telephone service and would not provide a letter of verification for anonymity reasons; 2) part of the billable minutes were with a foreign telecommunications carrier that could not provide the data by the deadline; 3) legitimate business situations prevented an agency from obtaining verification from certain of its carriers or a certain carrier. For each of these circumstances, we required a letter of explanation and signed verification of billable minutes pertaining to the explanation from the president/CEO of the agency. **You will find an asterisk next to the name of all "Top 50" agencies that supplied a small portion of their verification from their president/CEO due to one of the three circumstances identified above.**

In all cases, from the questionnaires to the letters of verification, the agencies

were warned that should falsification be detected, they would be disqualified from this and all future "Top 50" rankings. And indeed, *Customer Inter@ction Solutions* magazine's editorial staff carefully verified calculations, discrepancies and other aspects of the supplied information to ensure that this ranking is of true value to you.

## Understanding The Listings

As you read through the following list of "Top 50" agencies, you will notice that we have provided a numerical ranking of 1 through 45 (1 being the largest), but have not revealed the number of billable minutes used to arrive at this ordering. This was done out of respect for the confidential nature of this information to the many agencies included here that are privately held corporations. This year, only 45 companies met our minimum number of billable minutes to be ranked in the Top 50 inbound.

You will notice that the "Top 50" inbound has been divided into four cate-





gories: A, B, C and a global aggregate ranking. Category A is composed of U.S. service agencies whose primary business function is provision of telemarketing services for outside firms. If you are considering an international teleservices campaign, Category B consists of international teleservices agencies. Again this year we have separated out all international teleservices done by U.S. agencies and ranked those companies' international minutes in the International category, Category B. Domestic companies that are also ranked in the International category are marked with a dagger (†) in their domestic ranking.

Category C, which was introduced in 1998, is composed of companies that provide purely interactive inbound services (no live operators). We added this category to reflect the growing demand for such interactive inbound services. Companies that are in the Domestic and International categories that are also ranked in the Interactive category are marked with a double dagger (‡) in their Domestic and International rankings.

Finally, you'll see the list of Top 50 global performers, which ranks companies according to their aggregate outbound and inbound, and domestic and international minutes.

We hope you will use this "Top 50" feature, both inbound and outbound portions, for your outsourcing needs throughout the year, and be sure to tell the companies you found them in *Customer Inter@ction Solutions*.

Companies with enhanced listing are regular advertisers in *Customer Inter@ction Solutions*. **CIS**

**Category A**

1. Convergys \* † ‡  
<http://www.convergys.com>
2. ClientLogic \* † ‡  
<http://www.clientlogic.com>
3. GC Services Limited Partnership \* † ‡  
<http://www.gcserv.com>
4. SITEL Corporation \* †  
<http://www.sitel.com>
5. Teleperformance USA \* † ‡  
<http://www.teleperformanceusa.com>
6. APAC Customer Services, Inc. \* † ‡  
<http://www.apaccustomerservices.com>
7. LiveBridge, Inc. \*  
<http://www.livebridge.com>
8. ICT Group, Inc. \* † ‡  
<http://www.ictgroup.com>
9. Excell Services \* ‡  
<http://www.excellsvcs.com>
10. NCO Customer Management Inc., a division of NCO Group \* †  
<http://www.ncogroup.com>
11. The Connection \* ‡  
<http://www.the-connection.com>
12. Cross Country Automotive Services, Inc. ‡  
<http://www.crosscountry-auto.com>
13. AFFINA - The Customer Relationship Company \* ‡  
<http://www.affina.com>
14. Technion Communications Corp. \*  
<http://www.technion.com>
15. Center Partners, Inc.  
<http://www.centerpartners.com>
16. TCIM Services, Inc. \* ‡  
<http://www.tcim.com>
17. Interactive Response Technologies \*  
<http://www.callcenter.com>
18. Telerx \*  
<http://www.telerx.com>
19. DialAmerica Marketing Inc. \* ‡  
<http://www.dialamerica.com>
20. eTelecare Global Solutions \* †  
<http://www.etelecare.com>
21. Microdyne Outsourcing Inc. \*  
<http://www.microdyne.com>
22. InService America  
<http://www.inserviceamerica.com>
23. Vision-X Inc. \* ‡  
<http://www.vxiusa.com>
24. Americall Group Inc. (part of the SR. Teleperformance Group) ‡  
<http://www.americallgroup.com>
25. NOVO 1 (formerly Call\_Solutions) \*  
<http://www.novo1.com>
26. Telespectrum Inc. \* † ‡  
<http://www.telespectrum.com>
27. Alert Communications \* ‡  
<http://www.alertcom.com>
28. Hamilton Contact Center Services  
<http://www.hamiltontm.com>
29. InfoCision Management Corp.  
Ph: 330-668-1400; Fx: 330-668-1401  
<http://www.infocision.com>  
Year began providing teleservices: 1982  
Size of projects accepted:  
Minimum 500 hours  
Type of calling:  
B-to-B: 25%; B-to-C: 75%

Outbound: 83%; Inbound: 17%;  
Interactive Inbound: 1%  
Specialization: non-profit and religious fundraising, commercial sales and customer care, volunteer recruitment

30. Advanced Data-Comm, Inc. ‡  
Ph: 800-582-9501; Fx: 800-829-9780  
<http://www.advanced-data.com>  
Year began providing teleservices: 1988  
Size of projects accepted:  
Minimum 20 hours  
Type of calling:  
B-to-B: 71.5%; B-to-C: 28.5%  
Outbound: 48.23%; Inbound: 51.77%;  
Interactive Inbound: 5.76%  
Specialization: third-party verification, sales, publishing

31. AnswerNet Network  
<http://www.answernetnetwork.com>

32. Influent Inc. †  
<http://www.influentinc.com>

33. Global Response \*  
<http://www.globalresponse.com>

34. Archway Marketing Services  
<http://www.archway.com>

35. ChoicePoint Precision Marketing  
<http://www.cp-pm.com>

36. O'Curran Teleservices  
<http://www.ocurance.com>

37. MSA Solutions  
<http://www.msasolutions.com>

38. Merkafon International (part of the SR. Teleperformance Group) †  
<http://www.merkafon.com>

39. Synergy Solutions, Inc. \*  
<http://www.synergysolutionsinc.com>

40. OKS-Ameridial, Inc. \*  
<http://www.oksameridial.com>

41. Charlton  
<http://www.tcgcorp.net>

42. The Heritage Company, Inc.  
<http://www.theheritagecompany.com>

43. Millennium Teleservices  
<http://www.mmtel.com>

44. Epixtar (formerly Innovative Marketing Strategies, Inc.)  
<http://www.epixtar.com>

45. Teleservices Direct †  
<http://www.teleservicesdirect.com>

**CATEGORY B — International**

1. Convergys ‡  
<http://www.convergys.com>

2. SR. Teleperformance ‡  
<http://www.srteleperformance.com>

3. NCO Customer Management Inc., a division of HCO Group \* ‡  
<http://www.ncogroup.com>

4. SITEL Corporation \* ‡  
<http://www.sitel.com>

5. ClientLogic \* ‡  
<http://www.clientlogic.com>

6. Msource Corp. (MphasiS BPO Services) \* ‡  
<http://www.msource.net>

7. eTelecare Global Solutions \*  
<http://www.etelecare.com>

8. ICT Group Inc. \*  
<http://www.ictgroup.com>

9. PCCW Contact Center Business \* ‡  
<http://www.pccw.com/contactcenter>

10. ATESIA S.p.a. ‡  
<http://www.atesia.it>

11. Archway Marketing Services  
<http://www.archway.com>

12. Hispanic Teleservices Corp. \*  
<http://www.htc.to>

13. Technion Communications Corp. \*  
<http://www.technion.com>

14. GC Services Limited Partnership \* ‡  
<http://www.gcserv.com>

15. AFFINA – The Customer Relationship Company \*  
<http://www.affina.com>

16. Vision-X Inc. \* ‡  
<http://www.vxiusa.com>

17. Americall Group Inc. (part of the SR. Teleperformance Group)  
<http://www.americallgroup.com>

18. Influent Inc.  
<http://www.influentinc.com>

19. Alert Communications \*  
<http://www.alertcom.com>

20. Xentel DM Incorporated \*  
<http://www.xentel.com>

**CATEGORY C — Interactive Inbound**

1. Msource Corp (MphasiS BPO Services)  
<http://www.msource.net>

2. Convergys  
<http://www.convergys.com>

3. ATESIA, S.p.a.  
<http://www.atesia.it>

4. SR. Teleperformance  
<http://www.srteleperformance.com>

5. PCCW Contact Center Business  
<http://www.pccw.com/contactcenter>

6. ICT Group Inc.  
<http://www.ictgroup.com>

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<http://www.telespectrum.com>

11. DialAmerica Marketing Inc.  
<http://www.dialamerica.com>

12. Advanced Data-Comm, Inc.  
Ph: 800-582-9501;  
Fx: 800-829-9780  
<http://www.advanced-data.com>  
Year began providing teleservices:  
1988  
Size of projects accepted:  
Minimum 20 hours  
Type of calling:  
B-to-B: 71.5%; B-to-C: 28.5%  
Outbound: 48.23%; Inbound: 51.77%;  
Interactive Inbound: 5.76%  
Specialization: third-party verification,  
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13. GC Services Limited Partnership  
<http://www.gcserv.com>

14. APAC Customer Services Inc.  
<http://www.apaccustomerservices.com>

15. Cross Country Automotive  
Services Inc.  
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<http://www.apaccustomerservices.com>

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<http://www.msource.net>

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<http://www.mmtel.com>

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<http://www.livebridge.com>

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1982  
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Specialization: non-profit and religious  
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17. TCIM Services, Inc. \*  
<http://www.tcim.com>

18. Technion Communications Corp. \*  
<http://www.technion.com>

19. PCCW Contact Center Business \*  
<http://www.pccw.com/contact> center

20. Telespectrum Inc. \*  
<http://www.telespectrum.com>

21. ATESIA S.p.a. \*  
<http://www.atesia.it>

22. Access Direct  
<http://www.accdir.com>

23. Cross Country Automotive  
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<http://www.crosscountry-auto.com>

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<http://www.influentinc.com>

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<http://www.affina.com>

26. NOVO 1 (formerly Call\_Solutions) \*  
<http://www.novo1.com>

27. Archway Marketing Services  
<http://www.archway.com>

28. The Connection \*  
<http://www.the-connection.com>

29. Vision-X Inc. \*  
<http://www.vxusa.com>

30. Hispanic Teleservices Corp. \*  
<http://www.htc.to>

31. Teleservices Direct  
<http://www.teleservicesdirect.com>

32. ChoicePoint Precision Marketing  
<http://www.cp-pm.com>

33. Center Partners, Inc.  
<http://www.centerpartners.com>

34. Interactive Response Technologies \*  
<http://www.callcenter.com>

35. Epixtar (formerly Innovative  
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<http://www.tcgcorp.net>

39. OKS-Ameridial, Inc. \*  
<http://www.oksameridial.com>

40. Microdyne Outsourcing Inc. \*  
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 Ph: 800-582-9501; Fx: 800-829-9780  
<http://www.advanced-data.com>  
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<http://www.theheritagecompany.com>

43. MSA Solutions  
<http://www.msasolutions.com>

44. AnswerNet Network  
<http://www.answer.net>

45. Creative Marketing Strategies, Inc.  
 Ph: 800-793-2345; Fx: 856-404-6977  
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 Specialization: financial,  
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46. InService America  
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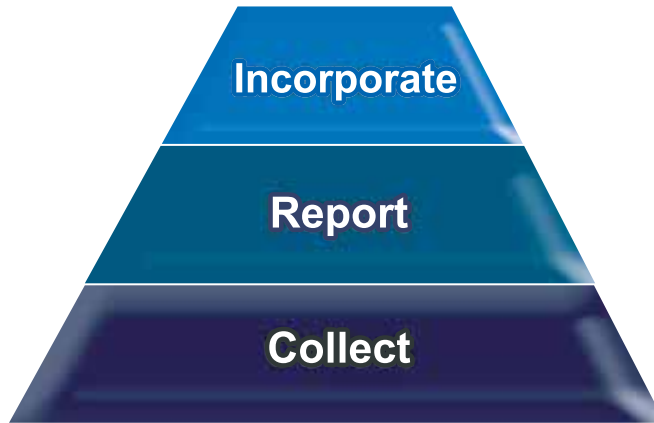
47. Alert Communications \*  
<http://www.alertcom.com>

48. Hamilton Contact Center Services  
<http://www.hamiltontm.com>

49. Global Response \*  
<http://www.globalresponse.com>

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Fortunately, companies are discovering a way to have the best of both worlds. Hosted solutions enable you to both maintain control of your operations and eliminate costly equipment and technology costs, while you gain the luxury of using the latest, greatest technology infrastructure to power your own applications. Instead of laying out a huge investment to build your own infrastructure and then paying for costly upgrades yourself, the hosted services provider does it for you.

With a hosted solution from a high quality solution provider such as West Corporation, you can make your existing contact center applications more efficient. By running your call center through West's proprietary Virtual ACD ([define](#) - [news](#) - [alert](#)), you can route calls virtually anywhere in the world, improving customer care quality while increasing your call capacity. You also enjoy the benefit of West's two decades of experience in intelligently routing calls and managing large-scale customer care operations for many of the world's largest companies.

So what are some ways in which your company can use and benefit from hosted contact center solutions?

- **Use hosted technology to allow your agents to work from home.** You have probably heard about the huge benefits of implementing "virtual call centers" or "home-sourcing," but what if you don't want to reduce or eliminate your existing workforce? You don't have to with a hosted solution. You can enjoy the same cost-saving benefits by using West's technology to enable your own contact center agents to work from home. West's Virtual ACD makes it possible to drive customer calls to your agents, wherever they may be located, while you maintain full control of your employee base. West can also provide the staffing, scheduling and training tools you need to run everything yourself.

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- **Use a speech-enabled IVR platform to provide intelligent call routing to your own brick-and-mortar agents and home agents.** Speech technology can be extremely powerful if used to both complement and front-end live agent solutions. However, building your own speech application from the ground up can be extremely expensive, not to mention all of the additional upgrade costs you'll incur to keep up with the improving technology. Powered by the industry's leading speech-recognition software, West's Advanced Speech Recognition solutions improve the caller experience by giving your customers the ability to use naturally spoken requests and commands to navigate

complex menu systems and conduct transactions. The West system can efficiently handle extremely large grammars; it delivers high accuracy, even with mobile devices and in noisy environments.

West has deployed speech recognition solutions in over twenty languages, and our team of speech scientists, dialog designers and linguists helps companies develop and tune their applications to improve efficiency and drive customer satisfaction.

The most important thing to remember about hosted services is that they do not have to be a replacement for your own customer care operations — they can be an enhancement. Providers such as West today offer solutions that help you get more out of your own contact center agents and applications. Hosted solutions enable you to achieve similar cost-saving benefits and technological advantages, as with an outsourced solution, but you maintain full control of your operations and, most importantly, your valuable customer relationships.

*For more information, please contact West Corporation at 1-800-841-9000, or visit <http://www.west.com>.*

## Go Hosted: Help Fund College Students' Expenses

What many enterprises don't act upon or what they completely fail to realize about the hosted (i.e., on-demand) contact center is that, because most mature on-demand products are Web-based, they are quite practical for distributed/remote contact centers and agents. With a hosted approach, significantly more people can be hired as virtual agents, working directly out of their homes, giving greater flexibility regarding hiring practices.

Precisely because of the hosted contact center, it's odd that more college students aren't remote contact center agents. Really, the on-demand model is rather ideal for them and the companies implementing the virtual agent service. Theoretically, most college or university students are fairly intelligent; they can speak some variant of English; most have a computer; and college campuses usually have very decent Internet infrastructures. So these students could work right out of their dorm rooms: log on to the dorm-room computer for Web browser access; take some calls; and get paid. After all, there's only so much blood and plasma one can give of oneself for a bit of spending cash.

Additionally, there is minimal up-front investment on the implementing company's part: you pay for what you use. Remote and international locations can be connected on the same platform without the further expense of additional software and equipment; on-demand contact centers can scale easily to accommodate growth or seasonality, also sparing future expenses. And because the hosted contact center allows companies to avoid the infrastructure cost and maintenance of an in-house contact center, more time is allowed for the company to spend on recruiting, hiring, training and scheduling the agents who will walk the callers through the customer service — possibly college students.

*David R. Butcher, Assistant Editor, Customer Interaction Solutions*

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# Of Jackpots And Jugglers, Making Service Optimization Work For You

Have you ever seen the street performers juggling five lawn chairs or six lit torches? They make it look so easy, but keeping all the items up in the air is no small feat. Similarly, field service dispatchers and managers in the call center do a fair amount of juggling of their own in managing the schedules of tens, hundreds or even thousands of field service technicians — keeping track of the availability of the entire staff, skill sets, service level agreements (SLAs), travel time to job sites, vacations and sick time.

Learning to efficiently allocate field service technicians is not something that happens overnight. It takes a well-thought-out plan followed by staff education for successful execution.

There are certain strategies and certain technologies that can be implemented to turn your call center into a master juggler — keeping customers happy and costs low. In this article, we'll explore how aligning strategic capacity and tactical resource planning with daily scheduling creates a winning mix for any call center team.

## Been There, Done That

Traditionally, dispatchers have managed the service scheduling process by manually scheduling each field technician to each job. This tedious process is not only complicated but is an inefficient way to both manage schedules and use dispatcher time, especially in large service organizations; not to mention, customer service is often sacrificed, as accurate arrival times are impossible to predict at the time the service call is scheduled, and schedulers on the phone with customers are forced to give several-hour appointment windows.

But the problem often goes beyond scheduling. Even organizations that are

able to schedule in an efficient manner are stymied when service demand exceeds the company's capacity of skilled engineers. So the problem facing schedulers in the call center today is multilayered and often has its roots in the upper echelons of the service organization.

If such is the case, how do we solve this problem?

## Optimize, Don't Compromise

Service optimization can be defined as the technology, solutions, methodologies and procedures used to manage field service delivery as efficiently as possible. Optimization helps service organizations to achieve highest levels of productivity from field resources, to boost customer service, to improve planning and dispatching and to enhance automation of service parts, logistics and inventory processes.

Overall, service optimization focuses on minimizing costs while maximizing a company's ability to serve its customers well. At the heart of optimization is the notion that you should not need to

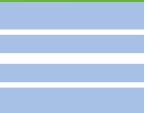
compromise high service levels for cost efficiency or vice versa. If you run a well-optimized service organization, there should be no reason why you cannot achieve both.

## Tackling The Six Ws Of Scheduling

As service managers begin to consider service optimization technology for their own companies, it is natural for them to focus on schedule optimization first. Scheduling itself can be very complex. For each incoming call, a scheduler needs to decide which engineer to send to the job, what that engineer will need to perform the job and when to promise the tech will be there. All of these decisions ideally should be based on who the customer is, where the customer is, and what kind of service that customer needs.

Essentially, schedulers need to know *who* will do *what*, *for whom*, *with what*, *where* and *when*. I like to call this the Six Ws of Scheduling, and it is a lot of information for a human to process in a matter of seconds on the phone. With optimized scheduling, much of the decision making is handled by software programs designed to answer these questions in the most cost-effective manner.

By Dr. Moshe BenBassat  
ClickSoftware



If optimized scheduling can so radically improve efficiencies in the service organization, what more do we need?

### The “777” Jackpot

Let’s not forget that our original problem goes beyond scheduling into other areas of the service organization. While optimized scheduling is a sure start to improving your call center, longer-term planning is critical to preventing daily scheduling “fires” in the call center. Without solid forecasting and capacity planning, even the best scheduling capabilities will not help you. Let’s take a look at the “777” approach to service planning.

Consider a slot machine in Las Vegas. Pull the lever, and if you get one “7,” you are not a winner. If you get two “7”s, you are doing better, but you are still not a winner. But if you pull the lever and get three “7”s, you have won the jackpot. Like winning the jackpot in a slot machine, the “777” approach is key to winning the jackpot in the service world and is gained by synchronizing a service operation’s strategic, tactical and operational decisions.

As with any other business, within the call center there are daily issues, midrange tactical issues and long-term strategic concerns. At the daily processing level — the most basic level — the decision horizon usually spans anywhere from seven minutes to seven hours to seven days. (Yes, this could actually be five minutes, eight hours and three days, but “777” makes it easy to remember.)

Midlevel resource planning spans seven weeks to seven months in advance, where managers consider training, vacationing and other staffing issues. While these managers don’t know exactly what they will be hit with in the coming weeks and months, they need to be able to determine the approximate capacity requirement. This knowledge then provides a basis from which managers can approve or decline training plans or vacation requests, shuffle resources between territories or bring in temporary help.

And at the highest level, strategic business issues such as new product introductions, general growth in business volume or geographic territory expansion need to be evaluated. This level of long-term forecasting generally happens seven months to 17 months in advance and should have a significant impact on subsequent capacity planning for the forecasted time period.

Moving back to the analogy of the slot machine, if you are able to look holistically at the entire decision-making horizon and succeed in synchronizing all the variables, from forecasting and capacity planning to tactical resource planning and daily scheduling, the rewards will be incredible — a jackpot. Without this synchronized approach, challenges will continue to arise, as even the best scheduler cannot do much when there is a severe shortage of resources due to poor planning. However, with proper forecasting, your resource capacity planning will be at the right levels, making the day-to-day scheduling as uneventful as a daily schedule can possibly be.

### Optimal Performance — On Your Terms

When it comes to measuring benefits in a field service organization, people generally fall in two camps of action: cut costs or improve satisfaction. Because schedulers often have different ideas of service policy objectives, schedulers under a manual system may not be scheduling engineers based on the same criteria as their colleagues, which leads to suboptimal performance on both the cost levels and the service levels.

Service optimization solutions, by virtue of what they do, force companies to define their service policies, as “optimization” is actually completely subject to the priorities of the company employing it. Once a corporate strategy is determined, the schedule is created consistently each time and is in line with corporate policy. This is perhaps one of the greatest hidden benefits of

**Achieving a schedule that utilizes resources in the most efficient way possible, while keeping your customers happy and your costs low, is only a “777” jackpot away — minus the Vegas odds.**

optimization. With a schedule consistently based on the same criteria, service organizations will be in a much better position to measure productivity, utilization and cost, among other things.

### Proactively Manage Change

While there is much value to be derived from implementing service management software, it is important not to lose sight of the inter-relationship among people, processes and technology during the transition. You have to make sure that the workforce is ready to accept the changes that come with the new technology, and you have to ensure that you have processes in place and workflows established that will allow people to function alongside the technology.

Given that much of the change management of service optimization affects the scheduling level (as opposed to the planning and forecasting levels), care must be taken to work with the dispatchers and technicians alike, to ensure a smooth transition and optimal performance.

From the field engineers’ perspective, optimization will bring about some positive but radical changes in their day-to-day activities. Technicians used to getting all their jobs at the beginning of the day and planning their own routes may start to find that jobs are filtered to them throughout the course of the day, with predetermined routes. Engineers that were previously underutilized will find themselves working more. In companies with labor unions, involving the union in the implementation plans from the start will help abate

issues that may arise if the new system seems in any way to go against the union's contract.

Optimization also means big changes for dispatchers who are accustomed to manual scheduling. In fact, the role of the dispatcher in an organization with optimized scheduling changes dramatically from the previous system. With the optimization engine making the bulk of scheduling decisions, dispatchers are becoming more "exception handlers" who manually schedule the jobs that cannot be automatically scheduled within the constraints of the system. As the role of the dispatcher changes, it is important that companies work with dispatchers to accept the changes and help them deal with issues that may arise.

#### Recap

So now you know what it takes to transform your service organization and call center into a more balanced operation, rather than a juggling act. Achieving a schedule that utilizes resources in the most efficient way possible, while keeping your customers happy and your costs low, is only a "777" jackpot away — minus the Vegas odds.

But remember, to be completely successful you must take into consideration forecasting and capacity planning, not only scheduling. If you define company-wide service policies and align daily scheduling with capacity planning and long-term tactical resource planning, your call center daily schedule will run much more smoothly, to the benefit of your entire organization. **CIS**

*Dr. Moshe BenBassat, Ph.D., is a world-renowned mathematician and pioneer in service chain optimization. He founded ClickSoftware (<http://www.clicksoftware.com>), a provider of software solutions that enable organizations to maximize field service delivery, after a distinguished academic career at USC, UCLA and Tel Aviv University, where his R&D work was funded by leading agencies such as the National Institute of Health,*

*NASA, DARPA and the U.S. National Science Foundation. Since entering the business world, Dr. BenBassat continues to teach ClickSoftware University, an executive MBA-style program that engages corporate managers and executives in analyzing the value of service optimization.*

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# The Evolving Network Demands Improved Security

A decade ago, a company could effectively secure its network through perimeter protection such as a firewall. At that time, networks had definitive borders, making it easier to safeguard critical internal assets with perimeter security technology.

However, as organizations recognized the business benefits of extending network access to customers, partners and vendors, the once-distinct perimeter quickly dissolved. With this increase in credentialed users now accessing the network from the outside, safeguarding internal assets with security technology located solely at the perimeter proved insufficient. Nonetheless, within many organizations, internal security still placed second in priority to increasing business process efficiency.

There is an inherent trade-off between security and accessibility, but many organizations have sought to strike a balance between making it easy for people to access the systems they need while still remaining secure. Yet many organizations, including CRM(define - news - alert) centers, are still exposed to more risk than necessary because they have not addressed the security ramifications associated with extending their network to third parties. For an organization to be truly protected today, it must continue to mind the perimeter, but it must also turn its focus inward and secure the internal network.

## When Networks Were Islands: Perimeter Security, Then And Now

In the past, a company's network operated — for the most part — inde-

pendently, with connections being made inside the organization only. Today's network, however, reflects how business relations have changed. For an organization to remain competitive in this era, conducting business rapidly and efficiently is imperative. This accelerated business environment has driven the need for an organization to extend access to multiple outside parties, thus creating a perimeter with numerous points of entry.

Further, without the right defenses, an organization's security posture is only as strong as the security posture of each third-party network to which it is connected. Therefore, the lack of security control at third-party sites puts an organization at considerable risk. For example, a successful worm exploited at a vendor site or partner site could easily infiltrate the main organization's perimeter security by exploiting trusted connections.

As such, these open networks are more vulnerable to malicious attacks — a disconcerting reality, as perimeter security in most cases represents a company's sole defense against hackers and malicious software (malware). Today,

worms and internal threats can easily circumvent perimeter security through virtual private networks (VPNs), mobile devices, encrypted traffic and insider attacks, exposing critical internal assets to potential exploit.

## Worm Attacks

The growing number of attacks, their heightened level of destructive power and the shrinking lag time between a vulnerability announcement and exploit has made perimeter security ineffective in the war against worms.

In fact, a recent study by the Yankee Group indicated that the average time for enterprises to both test and roll out patches is approaching two months. By contrast, recent worm attacks have

By Rob Nazzari  
Mazu Networks, Inc.



exploited vulnerabilities fewer than 15 days after the published advisory. This lapse in time leaves an organization exposed to potential exploit for weeks. For instance, the Nimda worm in 2001 had a lag time of 330 days. In April 2004, the Sasser worm had a much faster threat cycle of 16 days. Traditional perimeter security appliances miss these threats in those critical hours and days before signatures are available. As such, organizations that base their network protection solely on perimeter security and internal patch management are at a severe disadvantage when combating worm attacks.

### Insider Threats

Another significant risk to critical

infrastructures such as contact centers is insider threats. An insider threat refers to both potential and actual attacks by credentialed users or “insiders.” These attacks can result in theft or contamination of sensitive data, or disruption of highly critical services. There are several trends contributing to this growing threat to network security. The first is the increase in credentialed users. In the past, these threats were characterized by employees or former employees of the company. Today, however, with companies extending access to corporate resources, contractors, remote employees and business partners, there are often more credentialed users than employees connecting to the network.

The second trend is the move toward

wider access and Web services. As applications moved from mainframes to client servers to Web-based services, it has become more cost-effective to provide a wider group of users with access to applications and data. Although this has several advantages, including more efficient business processes, it also creates several security challenges because a Web browser is a highly effective hacking tool.

Traditional solutions, such as firewalls, signature-based intrusion detection systems (IDS) ([define - news - alerts](#)) and signature-based intrusion prevention systems (IPS) ([define - news - alerts](#)), are not designed to deal with this problem. First, these devices are typically deployed at the perimeter; sec-

ond, the internal network has far too many connections to monitor, making it exceedingly expensive to do with link-based solutions; and third, threats such as unauthorized access or sabotage of custom applications largely defy signature-based technologies.

Current strategies for protecting the internal network against these threats are largely focused on perimeter security and patch management. While perimeter security appliances such as IDS and IPS have helped with known threats, they have been largely ineffective against new attacks and threats brought into the network on mobile devices. Patch management has similarly helped eliminate vulnerabilities to many known threats, but it simply cannot keep up with the increasing speed of new exploits.

In planning for internal security, companies should consider their most critical processes, one of which is CRM. Perimeter-based defenses alone do not provide these critical infrastructures with the necessary protection from the increasing barrage of network attacks, many of which are now originating from the inside. This partial defense leads most enterprises to experience at least three disadvantages:

- Downtime and disruption of key internal applications and services;
- Loss or corruption of critical data; and
- Lost productivity among all staff, as well as diversion of key IT team members.

### A Layered Approach Is Required

Through a layered security approach, an organization can still benefit from an extended network and new business-enhancing technologies, and they can contend with the ever-growing number of malicious attacks. A layered approach will help minimize the opportunity for malicious users or software to access their intended target. If the malicious user or software infiltrates one layer, there will still be several others protecting the company's critical infrastructure.

The basic components of a layered security program include the following:

- **Perimeter security.** Perimeter security technologies, including firewalls, IDS and IPS, are a company's first line of defense against attacks. However, the typical network today has more egress and ingress points, which demand several layers of protection to safeguard against the activity that can circumvent perimeter security technologies.

- **Internal behavioral surveillance and protection.** Behavioral network security is a new layer that enterprises are quickly integrating into their security programs. With a clear understanding of how the internal network and assets in that network are used over time, and the ability to monitor all network activity, these products can identify malicious activity with pinpoint accuracy and safely mitigate it without disrupting critical services.

- **Policy enforcement and training.** It is imperative to a strong security program that anyone (within the company) who has potential to cause harm to the network's integrity is well educated on policy. Additionally, through technologies such as identity management and authentication, companies can gain better controls over how end users access network assets.

- **The desktop.** It is critical to have endpoint security such as anti-virus software integrated at the desktop.

Contact centers must consider yet another layer of security to effectively protect their systems from compromise. The human error element is a major concern for CRM centers, as call center representatives frequently interact with customers on a one-on-one basis. This contact grants criminals the opportunity to exploit representatives through social engineering tactics. Comprehensive training of customer representatives is a critical step in ensuring they do not fall victim to social engineering ploys, ploys such as the request for personal information without the appropriate proof of identification.

**Comprehensive training of customer representatives is a critical step in ensuring they do not fall victim to social engineering ploys.**

Worms and insider threats have the power to disrupt critical services, to drain vital resources and to compromise sensitive data. In today's accelerated business world, isolating a network is not an option. Conversely, business pressures are forcing companies to make applications and data inside the corporate network more accessible by remote workers, business partners and contractors. Patch management and perimeter security appliances, such as firewalls and IPS, are helping to secure networks, but they do little to help protect against new attacks, insider threats and malicious code that circumvent the perimeter on mobile devices. As attempts to steal or corrupt customer information increase, organizations need to mitigate these forms of attacks, requiring a solution that will block malicious activity without obstructing legitimate business processes. **CIS**

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# VoIP-Enabled Integration In The Contact Center Bridges The Gap Between CRM And Customer Response Management

With the rapid adoption of VoIP technology in the enterprise, today's contact centers are able to be more customer-centric than ever before. VoIP opens the door to integrating technologies that satisfy customers' desire for choice when contacting a company and, in turn, allows the company to be more efficient when responding to customer contacts. VoIP enables customer response management for contacting and routing to seamlessly integrate with customer relationship management (CRM) for efficient handling of each contact.

To be competitive and customer-centric, a typical contact center offers its customers choices for how the customer would like to engage with the company — immediate assistance, deferred assistance, or engaging with the company via self-service. Yet companies struggled to manage multiple customer response service models for responding to multiple customer inquiries. The immediate assistance service model is typically delivered by live agents in a call center, but it can also be delivered via Web chat, and even through immediately escalated e-mail. Deferred assistance is typically provided again by live agents responding to e-mail and voice messages, although automated response applications remove the live agent from the process. And self-service is typically delivered over the Web in the form of knowledge base information or over the phone via an IVR([define - news - alert](#)).

The degree to which these three service models are integrated determines how intelligently and cost-effectively a

company can respond to a customer need. These service models usually are designed around proprietary hardware and software solutions in a silo fashion, with little to zero integration. In addition to the inefficiency of the silo architectural design, the cost of integrating these service models with proprietary hardware is often prohibitive and is, therefore, seldom considered. Today's customer response management software applications leverage VoIP ([define - news - alert](#)) technology to integrate all three customer service models into a single, consolidated software application on the corporate data network.

In addition to the integration of the customer service models, VoIP( also enables these models to be tightly integrated with CRM to automate the routing and prioritization of customers based on historical insight in the CRM

database. In fact, because today's VoIP-based customer response management applications are software-only architectures, the integration with CRM applications is at a fraction of the cost and deployment time of traditional CTI ([define - news - alert](#)) (computer-telephony integration) deployments for database access, routing and screen-pop.

There are several compelling reasons for companies to consider the latest customer response software applications:

*Prioritize and route customer responses, based on customer need, customer value to the business, and resource availability.* The integrated customer response solution allows every customer contact to be evaluated based on the history and relationship of the customer with the company. In this way, companies can respond immediately to highest valued or highest priority customers, regardless of how they chose to contact the company (phone, e-mail or Web). Any business value in any database can be used to determine the priority of a customer.

By Joseph McFadden  
Nuasis Corporation



*Provide a more flexible model that allows you to intelligently choose when to escalate the response based on customer need and value to the business.*

Without the integration of customer response service models with CRM information, it is often the type of service model the customer chooses that dictates the level of service the customer receives. If a customer took the time to phone a company, then that live person-to-person call would be deemed more important than an e-mail, when in fact, the e-mail may be from a higher valued customer. However, the value of the customer to the company is not realized upon contact unless the customer's CRM information is integrated with the service models. With the integration, a "high value" customer e-mail, which typically is handled as a deferred contact, can be escalated and handled immediately by a live agent.

*Service customers consistent with your goals to reduce operational costs while exceeding customer expectations.*

As companies attempt to drive customers to self-service, the challenge is to drive the right customers to self-service and to identify those who require deferred or immediate assistance. Driving all customers to self-service, without regard for the customers' needs or their value to the company, forces the company to risk losing the loyalty of some customers.

*Reduce the cost of managing multiple customer service models.* Companies rely on reports generated by customer service models (phone, e-mail and Web) for making current and future business decisions and improvements. However, today's separate silo operations and systems for phone, e-mail and Web applications require separate system administration, which equates to separate reports. Consolidating, comparing and analyzing the reports each becomes a time-consuming, unmanageable and costly part of the operation. The latest customer response software applications both require a single administration tool and provide consol-

idated reporting across all service models so business decisions and improvements can be made quickly and cost-effectively.

*Improve the return on your CRM investment.* Today only 36 percent of large call center operations deploy productivity applications such as data-directed call routing and screen-pop at the agent desktop (Datamonitor, 2004). The reason for such a low rate is the prohibitive cost of deploying these applications. Only the larger centers can afford the expense of CTI hardware, CTI middleware and professional service fees for complex and lengthy projects. The latest customer response software applications integrate easily with CRM applications. Typical deployments for screen-pop, as an example, are done within a day or two. And by eliminating the cost barrier to CTI deployments, companies can more widely deploy CTI to multiple database applications.

Ultimately, the integration of the latest customer response software applications with all three customer service models provides the opportunity for companies to handle customer contacts more efficiently and more cost-effectively, producing a win/win situation for both the customer and the company.

### It's About The Software, Stupid

An important point to make about today's customer response management applications is that they are most successful working on a software-only, VoIP-enabled architecture that can tightly integrate with other applications important to the customer experience and reduction of costs in the call center.

Traditional customer contact-routing or contact-handling applications (ACD, IVR, etc.) have been built around a vertical solution approach. The vertical approach has been costly and complex to deploy for several reasons:

- *Vendor specificity.* Companies are forced to deploy multiple vendor solutions to address the total set of call center requirements. Total cost of ownership across all vendor platforms is high.

**Today only 36 percent of large call center operations deploy productivity applications such as data-directed call routing and screen-pop at the agent desktop.**

- *Proprietary hardware and software.* Multiple proprietary vendor solutions limit interoperability and increase the cost of deployment because of integration requirements (CTI, APIs, customized software, additional hardware).

- *Two network infrastructures.* In most cases, the various solutions deployed within a call center operated either on the telephony network or on the data network. Application development across two networks was costly, complex and time consuming.

This model resulted in the current infrastructure for contact centers: a set of telephony-based switching components sitting on the telephony network; a set of data applications (CRM, e-mail, chat, etc.) sitting on the data network; and a third layer that consisted of lots of CTI hardware and middleware to integrate the voice and data components. This third layer also required lots of care and feeding, in the form of expensive CTI professional services, in order to deploy applications.

The reason for much of the expense can be traced back to where the integration effort occurs. The integration or interoperability of multiple voice and data solutions typically occurred at the telephony network level or in the switching platform. Again, proprietary systems and multiple vendors increased the cost of application deployment.

The new, horizontal, software-only model for contact centers is a model more familiar to IT professionals. This simplified model allows companies to leverage a common hardware platform for all enterprise applications, typically based on low-cost generic servers. The

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network infrastructure, or layer, relies on the company's IP data network. In the case of the contact center, both voice and data are carried over this single network. The software layer sits on top of the network layer and is based on a set of industry standards (e.g., VXML, XML ([define - news - alerts](#)), VoIP, SIP([define - news - alerts](#)), SOAP([define - news - alerts](#)), ODBC ([define - news - alerts](#)) adopted by vendors to support interoperability and to support faster deployment. And finally, the application layer, call routing and queuing, IVR, self-service applications, Web chat, etc., are built around these standards.

This new software-only model for customer response delivers general deployment benefits, as well as specific call center benefits:

- **Low-cost deployment.** As with other enterprise software applications, the call center application leverages a common, low-cost hardware infrastructure on which companies have standardized. This server-based infrastructure costs less to deploy and manage.
- **Interoperability.** Systems and applications built on industry standards allow companies greater flexibility when designing business applications.
- **New distributed architecture.** The distributed nature of an IP network supports one of the critical requirements of any call center — system reliability. A distributed architecture allows companies to cost-effectively network multiple locations together in a distributed fashion, for redundancy and call fail-over.
- **Multimedia contact routing on a single platform.** VoIP enables the software-only, single-network approach: all media (phone, e-mail, Web) on a single platform for universal queuing and consolidated reporting.

### Align Your Customer Service (Contact Center) Strategy With Your CRM Strategy For Operational Cost Reductions

The value of integrating CRM databases with telephony-based contact-routing systems has never been disput-

ed. Applications such as screen-pop and data-directed routing dramatically reduce agent time on the phone and thereby reduce the number of agents required to respond to a volume of customer contacts. Those same applications more intelligently route customers to the agents best skilled to handle the contact, effectively improving the customer experience.

It's the cost of the integration that has been at the center of such low adoption and deployment statistics as previously noted. The fundamental difference in the two approaches — vertical, telephony-based solutions versus horizontal, software-only solutions — is that the integration for telephony-based solutions occurs in the telephony switching components. With the software-only model, the integration occurs at the desktop and application layer, dramatically lowering the complexity of integration.

Most cost justifications or ROI analysis for IP contact center systems are based on hybrid IP models. These systems are composed of TDM switches that have been "IP-enabled" by swapping telephony trunk cards for IP line cards. In this manner, voice traffic is carried over the data network or IP network. But cost justifications for these hybrid IP solutions are weak. In fact, they are so weak that some industry analysts now recommend companies do not undertake this hybrid conversion. In contrast, by moving to a software-only, VoIP-based solution, a company can impact strategic cost areas for a potential saving of more than \$4 million annually.

For example, a company operates three call centers geographically dispersed, 100 agents at each location. The centers use traditional TDM ([define - news - alert](#)) switches to route calls across telephony network services. They are contemplating the deployment of CTI applications for screen-pop at the agent desktop. After deploying as such, they should attain the following results:

- **Labor cost reductions as a result of**

**The value of integrating CRM databases with telephony-based contact-routing systems has never been disputed.**

*networking centers over IP.* By combining multiple dispersed pools of agents into a single, larger pool, the same volume of contacts can be handled by fewer agents.

- **CTI application deployment cost reductions.** Conservatively, a single deployment of a screen-pop application can cost \$250,000. Multiply that expense by three sites for a total of \$750,000.

- **Agent productivity gains from wider CTI application deployments.** Assuming a 20-second call reduction per call for calls of three-minute duration on average, a 300-agent call center could reduce labor costs by \$1.2 million.

Software-only, VoIP-based contact center systems are setting a new level of customer service response. Customers no longer have limited choices for contacting a company. At the same time, these contact centers can now customize each customer service experience so that the customer's service expectations can be met, while the company can meet or exceed its customer service and operation performance goals. **CIS**

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# INNOVATIVE IDEAS FROM THE NEXT-GEN CONTACT CENTER

## IP Contact Center Technology: What You Need To Know (Part III)

### Multisite Contact Center Technology Centralization: Eliminating The Risks

Over the last few months, this column has focused on the productivity and cost reduction benefits inherent in IP contact center technology — and on the core technology pitfalls that companies deploying IP contact center technology must address in order to be successful. We've also focused on how large-scale commercial service providers have addressed these issues with “built-for-purpose” technology and on the lessons learned for companies going down the same path of technology centralization. This month we'll be looking at the benefits of actually leveraging technology resources directly from a commercial service provider as an alternative to in-house corporate deployments of hosted services technology.

#### The Challenge

With traditional premise-based technologies, multiple locations typically require their own dedicated systems; each of which must be custom-integrated at tremendous costs on a site-specific basis and provisioned with dedicated licenses, phone lines and IT staff at each location. Leveraging voice over IP (VoIP) ([define](#) - [news](#) - [alert](#)) and high-speed data networks to centralize technology resources can therefore deliver compelling economic benefits for multisite organizations. However, there are clear limitations inherent in trying to extend traditional legacy contact center solutions to support geographically diverse locations. Beyond issues related to scalability, reliability, network security and manageability at scale, the biggest issue relates to the need to preserve local autonomy for some sites or groups of sites.

#### An Easy Alternative

As the mission of this column is to explain how IP contact center technology risks can be avoided, it would be negligent on our part if we didn't devote at least one column to the option of outsourcing the problem. As a number of commercial service providers have noted following our previous columns, one of the most obvious ways of addressing potential technology risks and challenges is to outsource the provisioning and management of contact center technology resources to a world-class provider of hosted services, such as [TELUS](#) ([quote](#) - [news](#) - [alert](#)), [Siebel](#) ([quote](#) - [news](#) - [alert](#)) (Contact OnDemand) or [MCI](#) ([quote](#) - [news](#) - [alert](#)). Such

service providers offer businesses the ability to cost-effectively blend customer communications from any source — phone, e-mail, fax, Web (chat and collaboration) or voice mail — in a unified hosted solution that can direct customer interactions of any media type to the most appropriate agent with advanced skills-based routing discipline at any location. Such service providers can also deliver world-class monitoring and recording capabilities for quality assurance and training purposes.

While some companies will obviously prefer to run contact center technologies out of their own data centers, particularly because the same “built-for-purpose” technology that commercial service providers rely on is now available for corporate deployments, it is also clear that commercial hosted services can still deliver differentiated value and provide a compelling alternative to in-house deployments for many companies. Here's why:

#### Elimination Of Up-Front Expenses

Outsourcing your technology needs to a hosted services provider can eliminate all up-front capital expenditures, traditional development and testing costs, integration expenses and other up-front costs that are typically required when deploying traditional premise-based technologies. The elimination of these up-front expenses can be extremely meaningful for organizations with budgetary constraints.

#### Ongoing Operational Expense Reductions

Large-scale service providers can enjoy tremendous economies of scale that enable them to dramatically drive down the cost of technology management to levels far below what companies can achieve with dedicated, stand-alone systems.

#### Risk Management

The elimination of all development and integration risks is another key consideration. Consider that mainstream business publications, analysts and academic research consistently report that 60 percent to 70 percent of IP contact center deployments never achieve their stated objectives. Now the deployment risk can belong entirely to the service provider,



who must meet your needs to keep your business. Because that same service provider will often also bundle data-networking services, you can entirely eliminate all vendor finger-pointing by dealing with a single service provider that can take comprehensive responsibility for the provisioning, delivery and ongoing maintenance of the solution.

Real-time disaster-recovery capabilities are another attribute of “built-for-purpose” hosted services technology, ensuring that your mission-critical business systems will never be at risk.

The elimination of risks related to technology obsolescence is another key benefit from a risk management perspective.

### **Time-To-Market**

Another important benefit of dealing with a world-class service provider is the elimination of traditional time-to-mar-

ket barriers, as all required resources will typically have been pre-installed in the service provider’s network. Another key benefit is the ability to cost-effectively address unanticipated capacity requirements on demand to meet unanticipated or seasonal shifts in capacity requirements.

As all industry veterans know, purchasing contact center technology has traditionally been a frustrating and lengthy process; taking months and sometimes longer than a year to complete, depending on the complexity of the deployment. This can increase exponentially when attempting to centralize “traditional” vendor technologies to encompass the diverse needs of your different locations. “Built-for-purpose” hosted services technology is integrated-by-design and is differentiated by its ability to eliminate the traditional time-to-market barriers ordinarily associated with technology customization and configuration. The key is that complex customization

# INNOVATIVE IDEAS FROM THE NEXT-GEN CONTACT CENTER EXPERTS

requirements can now be fulfilled via menu-based, on-demand technology — without custom-programming and systems integration services. This on-demand technology approach can deliver all of the routing rules and company-specific customization capabilities that an organization could obtain in the custom integration model — but in a fraction of the time and with greater reliability.

## World-Class Advice

When dealing with a tier-one service provider, companies

## Learning From The Mistakes Of CRM

About two years ago, many analysts and industry publications started crowing about “the failure of CRM.” They spoke of [CRM \(define - news - alert\)](#) as if it was the concept itself that was bad. Few bothered to explore in-depth exactly why so many companies could not attain success with CRM.

Simply put, CRM was too complex an idea and undertaking to implement as one would a new e-mail management program or a piece of workforce management software. It didn’t “slot” in anywhere and sit quietly, behaving itself and serving up immediate improvements on a silver platter. The very nature of CRM meant it crossed all of a company’s systems, demanding that every employee in the company, from the HR people to the accounting people to the CEO, alter their daily processes.

Companies that splashed out a great deal of money on CRM software were unwilling to dedicate the IT and training resources to actually make it work. They waited for it to work miracles on its own, ignoring that old IT acronym “GIGO,” or “garbage in, garbage out.”

The lessons of what went wrong with CRM implementations are helping [VoIP \(define - news - alert\)](#) installations succeed today. The messages we’re now hearing? Don’t go it alone. Try before you buy. Demand executive-level “buy in” to the purchase. You get what you pay for. Never lose sight of best practices.

This all sounds obvious, until we think about how blatantly all of these tactics were ignored during the Great CRM Debacle of a few short years ago. Unfortunately, with the pace that VoIP is penetrating the business world, “Once bitten, twice shy” feelings will leave a company a decade behind its competitors. The business world today is not for the faint of heart. Be brave.

By Tracey E. Schelmetic, Editorial Director,  
Customer Interaction Solutions magazine

gain the added value of leveraging world-class advice regarding best practices on an ongoing basis — to ensure those companies get maximum value from the technology resources for which they are paying.

## Try Before You Buy

Another benefit of dealing with a tier-one service provider is that they often resell the same technologies they source to deliver their hosted-services offerings, enabling companies that are determined to own their technology resources to “try before they buy” the proposed technology centralization solution. Hybrid deployments are also possible, enabling companies to buy only what they know they need while at the same time leveraging the service provider for seasonal and unexpected spikes in contact center traffic and disaster-recovery services.

## Caveats

So what’s the difference between service providers? The truth is that you typically get what you pay for. Tier-one service providers invest heavily in their networks to ensure that every component is “redundant” — enabling your business communications to flow smoothly even if individual hardware or software components fail. Providers lacking this sort of redundancy are those that tend to compete purely based on price — with lower costs resulting from their failure to provision an adequate safety net.

You also want to select a service provider with the resources to meet your needs both today and tomorrow. The long-term viability of your service provider’s business is also an obvious and important consideration. What would happen if your service provider closed its doors after your migration was complete?

You also clearly need to ensure that your proposed service provider can actually deliver the technology required to fully overcome all of the obstacles we mentioned at the beginning of this column. Some have failed to upgrade their offerings to on-demand solutions because of legacy investments in older technologies that can’t be easily written off. Some also offer hosted solutions on both their legacy and next-generation infrastructures, requiring you to dig deeper. One litmus test: older offerings won’t empower your managers to implement granular, real-time changes on demand. Why you care: academic research and common sense dictate that companies that can “fix” problems in real time make more money.

As always, for more information on IP contact center technology or to simply provide feedback, you can e-mail us at [info@telephonyatwork.com](mailto:info@telephonyatwork.com) or (in Canada) at [kevin.hayden@telus.com](mailto:kevin.hayden@telus.com).

*Eli Borodow is the CEO of Telephony@Work (news - alert), a provider of adaptive, multitenant IP contact center technology for service providers and multimedia contact centers. Kevin Hayden is the director of Integrated Contact Centre Solutions at TELUS Communications Inc., a tier-1 telecommunications carrier in Canada and a Canadian provider of hosted contact center services.*

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If you have any questions, please contact Tracey Schelmetic at (203) 852-6800 ext. 133 or e-mail: [tschelmetic@tmcnet.com](mailto:tschelmetic@tmcnet.com).

## Brooktrout, Vocomo, MScript Deliver VoiceXML-Based Tool For Salesforce Automation

**Brooktrout Technology, Inc.**, ([news- alert](#)) a supplier of media processing and call control products, and **Vocomo**, which provides next-generation IVR systems, recently announced that **MScript** is using Vocomo's VoiceXML IVR system, which runs on Brooktrout's TR1000 voice platform, in its SalesScript application. SalesScript is a Web-based application that enables sales representatives to input real-time account information via voice, helping to save time and increase their workflow. Sales professionals can use SalesScript with CRM applications such as Salesforce.com to update their records while they are on the road. With this new IVR tool, users are better able to spend more time in the field, enter data faster and save over 40 hours per month compared with the old way of typing in the information back at the office.

"MScript selected the Vocomo/Brooktrout solution because it enabled us to quickly design an application that addresses our customers' needs," said Mark Golino, CEO of MScript. "Vocomo's VoiceXML capabilities and standard hardware provided both ease of development and ease of use by tightly integrating with our Web application, business processes and telephony system. We selected the Brooktrout TR1000 voice board because it offered a scalable product line from our initial T1 installation to higher port densities. We were also very familiar with Brooktrout from their fax products."

The Vocomo/Brooktrout system was designed to help improve sales productivity by providing a telephone interface for data entry instead of typing at a computer. The TR1000 handles the telephone prompts and information captured during the call. For example, sales professionals can call into the SalesScript tool and select the appropriate [Salesforce.com \(Quote - news- alert\)](#) form to create a new lead, enter a new contact or update an existing sales opportunity. The entered information is then pushed into the CRM database. With this tool, sales professionals can enter information faster by speaking 80 words per minute versus typing 20 words per minute, allowing them to spend more time with customers and less time on administrative duties. By making the information easier to enter, sales professionals can also deliver more timely information on their activities. <http://www.vocomosoft.com>, <http://www.brooktrout.com>, <http://www.salesscript.com>

## SER Partners With Aurix

**SER Solutions, Inc.**, ([news- alert](#)) a provider of software solutions that help contact center operators achieve better efficiencies, maximize workplace productivity and enhance customer service, has announced that it has partnered with **Aurix Ltd.**, ([news- alert](#)) a provider of speech processing tools. SER has integrated the Aurix phonetic speech engine within SERTAINTY, the company's agent performance optimization solution.

For contact centers to be successful at increasing agent effectiveness, reducing costs and improving service levels, using technologies that provide immediate feedback and coaching opportunities to call center agents is imperative. Leveraging the underlying Aurix phonetic speech engine, SERTAINTY analyzes conversations that occur between agents and their customers, flagging only those calls that need to be reviewed by a supervisor. This process eliminates the manual process of analyzing customer interactions, which can be costly and time-consuming. With SERTAINTY, contact centers can unlock the information stored in their call recordings and use it to address quality issues; more accurately measure, coach and reward agents; and identify business-critical trends. <http://www.ser.com>, <http://www.aurix.com>



"Speech and silence. We feel safer with a madman who talks than with one who cannot open his mouth."

— E.M. Cioran (b. 1911), Rumanian-born French philosopher.



## Definition Du Jour

### Reusable Dialog Components

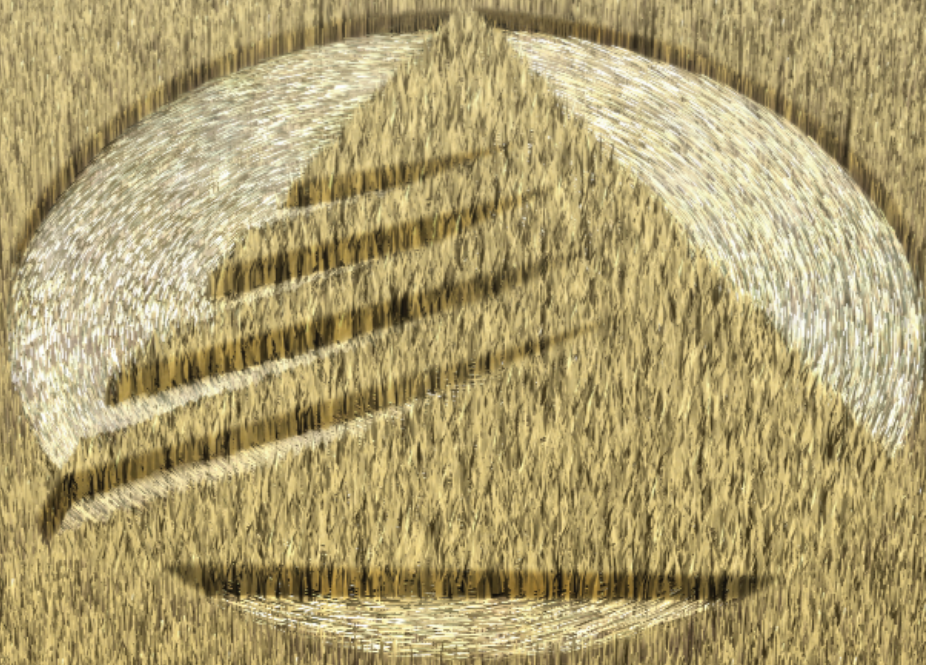
Reusable dialog components (RDCs) are "prebuilt building blocks" that allow developers to build applications by providing standard default settings and behavior. RDCs provide pre-packaged and "out-of-the-box" functionality that enables developers to quickly build robust speech dialogs even though they may not be familiar with the complexities of building dialogs from scratch; intricacies such as confidence score interpretation, error recovery mechanisms, prompting, etc. To use a baking analogy, RDCs are the equivalent of boxed cake mix and canned frosting.

## Gartner Names AVST A Visionary In Unified Communications Magic Quadrant

**Applied Voice & Speech Technologies Inc. (AVST)**, ([news- alert](#)) a provider of enterprise communications solutions, has been listed in the visionaries' quadrant for unified communications vendors by the research and advisory firm **Gartner Inc.** The report, "Magic Quadrant for Unified Communications 2005", recognizes that the innovative features and capabilities of AVST's CallXpress has brought the company significant mindshare and market share. The report noted that UC technology and applications have matured considerably in the last year. Products such as AVST's CallXpress unified communications platform and Seneca advanced speech module are gaining acceptance because they offer significant value to the enterprise market.

According to Gartner, AVST's CallXpress solution should be considered by companies that are looking for a platform-independent migration path from voice mail to unified messaging and a third-party unified communication solution. CallXpress has a robust feature set that unifies e-mail, voice mail and fax inboxes, and enables hands-free phone access to voice mail, e-mail, fax, calendar and contacts. It provides flexible management on the road, allowing users to manage voice, fax and e-mail messages from any location at any time — whether via desktop, laptop, PDA, wired telephone or cell phone. When LAN or Web access is not available, all messages can be managed in one phone call. From a desktop computer, CallXpress users have access to voice, fax and e-mail messages in a single e-mail inbox. <http://www.avstgroup.com>, <http://www.gartner.com>

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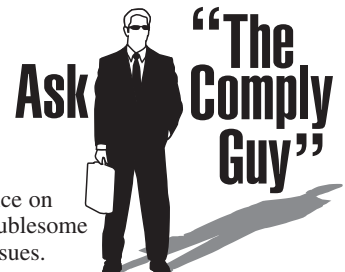


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# IBM And Speech Technology:

## An Interview With Bruce Morse

To give readers a more comprehensive picture of where [IBM \(quote - news - alert\)](#) stands today in the realm of speech technologies, *Customer Interaction Solutions* recently spoke with Bruce Morse, vice president of Contact Center Solutions for the IBM Software Group. Morse is responsible for establishing IBM as a major software provider for developing, deploying and managing contact center solutions. He has over 25 years' of software and hardware experience in the information processing industry and has held executive positions in marketing, development, finance and business development. Prior to his current role, he was vice president, marketing, sales and business development for IBM's Pervasive Computing business. In that role, he built a number of strategic alliances that established industry software specifications and standards, and he significantly expanded IBM's software and services participation in the wireless/mobile and speech markets.

CIS: Historically, from where did IBM's speech technologies grow in IBM's product family?

Morse: IBM's interest and investment in speech recognition began at IBM Research over 30 years ago. We anticipated that as the technology matured it would become the preferred method of accessing and interacting with information technology in a wide variety of scenarios. We're now at an inflection point in speech recognition where users find it to be a satisfactory and pleasant way to do personal and company business.

IBM was the first to use a purely statistical approach to voice technology while others attempted to teach a computer how to mimic human linguistics. The early 1990s featured IBM dictation software. A few years later, IBM's first speech recognition software family, VoiceType, was produced. IBM ViaVoice products were introduced in the late 1990s, and they continue to evolve today in offerings such as IBM Embedded ViaVoice, which speech-enables personal digital assistants

(PDAs) and in-vehicle telematics.

IBM speech technologies are now an integral part of the WebSphere family of products. They leverage WebSphere process and application integration capabilities to model, simulate and optimize business processes, and to reliably and seamlessly exchange data between multiple applications.

As a technology company that has helped millions of customers make smart IT investments, IBM is uniquely positioned to help companies extend access to those systems to their employees, customers and business partners. Just as the personal computer and Web browser have opened up application access to millions of users, speech technology extends access to the two billion telephones in the world today, as well as to all kinds of mobile devices.

As the most natural way to interact, speech is at the beginning of a tidal wave in contact centers, devices and automobiles. Speech allows people to interact easily and cost-effectively; it improves customer service and lowers cost. The return on investment (ROI)

for speech-enabled applications can be dramatic.

CIS: Why do you believe that speech is best delivered in an on-demand model?

Morse: In today's business environment, companies have to be flexible, responsive and able to take advantage of opportunities instantly. That is the essence of the on-demand model. As a primary interface to a company's customers, speech-enabled applications are at the forefront of the on-demand model. Contact centers worldwide are increasingly looking at integrating all methods of customer interaction, including Web and telephone, to ensure a consistent customer experience, reduce cost and drive revenue growth through cross-selling and upselling. Speech-enabled contact centers ensure that up-to-the-minute customer information is available and leveraged across multiple communications channels. For example, a retail bank may want to know when a customer calls requesting forms to apply

for a home equity loan so [the bank] can immediately route [the customer] to a live agent, bypassing the speech application entirely in order to close the business quickly. When interest rates change, the bank may want to change its Web and speech-enabled applications immediately to cross-sell certain offerings over others. IBM provides highly flexible and customizable speech solutions built on the highly acclaimed WebSphere Application Server platform.

CIS: Why do you believe a company like IBM is better suited to offer speech than its many niche competitors?

Morse: Speech has evolved into a mature enabling technology that reaches far beyond turning spoken words into text. Speech extends access and interaction to an enterprise's data and business processes, improving customer service while reducing the total cost of completing a transaction. Integrating speech access to business processes in a cost-effective, flexible and secure way requires a deep understanding of the enterprise's IT infrastructure and business processes. IBM's position as the leading middleware provider and our expertise in business process transformation uniquely position us to help our clients leverage speech to improve customer service, reduce cost and drive incremental revenue.

IBM is recognized around the world as one of the pioneers in speech research and development, with deep expertise to analyze, design and deploy speech-enabled applications. IBM's research organization has over 30 years' of experience in speech. It is highly skilled in voice user interface design, persona development and grammar, has more than 250 speech patents and over 100 researchers worldwide in speech labs, including China, Haifa, Tokyo, India and Almaden, working in more than 15 languages. Our work ranges from con-

tact centers to mobile devices to automobiles. IBM is a leader in driving and incorporating speech standards such as VoiceXML, MRCP and W3C. We work with companies of all sizes. IBM was the first to deploy natural language understanding in an automated contact center. For two consecutive years, JD Power and Associates surveys rating customer satisfaction with in-car navigation systems found the top cars were from Honda and Acura, which use IBM's Embedded ViaVoice speech recognition technology. Our contact center customers have found our speech solutions improve call retention rates by six to 10 percent, cutting call times by 10 percent and decreasing costs by up to 90 percent compared to assisted services.

IBM is also helping the large community of developers, ISVs and customers deploy and manage speech enablement. We have made significant contributions to the speech industry, through open standards work on VoiceXML ([define - news - alert](#)), CCXML ([define - news - alert](#)) and MRCP ([define - news - alert](#)), as well as to the Eclipse Foundation, including our recently announced contributions of VoiceXML and CCXML editors. In addition, we recently announced our contribution to the Apache Foundation of the Reusable Dialog Components (RDC) Framework. A barrier to the adoption of speech capabilities has been the skills required for high-quality voice user interfaces. By moving the requirement into the building of RDCs that can be joined by application developers, IBM enables experienced application developers to concentrate on what they know best, while skilled voice user interface designers do their work up front, in the RDC.

IBM regularly participates in performance improvements and transformation efforts for the world's leading organizations through our management consulting group, IBM Business Consulting Services. Our ongoing



**Bruce Morse**

involvement with all of the major industries gives us a deep understanding of industry business models. Our teams ensure that our solutions are relevant, practical and well thought out.

CIS: On what applications for speech is IBM focusing?

Morse: IBM is focused on developing and offering first-class speech capabilities and tools, while our business partners and customers provide targeted speech-enabled applications. We are focused on three primary areas:

- Contact center functionality, such as call routing and natural language understanding.
- Multimodal interaction, or the ability to combine multiple input/output methods in the same interaction or session. IBM's WebSphere software integrates different modes of data entry — speech, keyboard strokes, visual and handwriting-recognition technology. For example, one of our customers developed speech, keyboard and handwriting-enabled input and output applications on handhelds used by doctors in the pediatric intensive care unit of Miami Children's Hospital. Healthcare providers can give spoken commands to access and input patient information and can enter repetitive data using multiple modes of interaction.
- Embedded speech in telematics (e.g., vehicles), devices (e.g., cell phones,

PDA's, etc.) and other consumer appliances (e.g., set top boxes, DVD players). For example, IBM Embedded ViaVoice technology in OnStar provides, on some models, the basis for a hands-free, in-vehicle, safety, security and communication service, putting the company at the forefront of the automotive telematics industry.

CIS: Speech has historically been considered a "high-maintenance" technology. How is IBM carrying out its promise to lower development time and complexity?

Morse: There are two million to three million J2EE developers in the marketplace, and our tooling and open source strategy has been to enable this highly skilled group to expand its reach into speech enablement. By creating plug-ins to the Eclipse framework, we help developers leverage their existing skills in Web development to extend to speech. We are contributing to the speech industry's efforts in order to shorten development time and decrease complexity through our commitment to open standards such as VoiceXML, CCXML, MRCP, xHTML ([define - news - alert](#)) and X+V ([define - news - alert](#)). In addition, we have donated approximately 20 VoiceXML Reusable Dialog Components (RDCs) to the open source community through IBM's Alphaworks.

As more and more of the speech ecosystem adopts and writes to the RDC framework, the time and the skills needed to deploy will come down considerably. By moving the voice user interface (VUI) skill from the application layer to the RDC layer, we leverage the skills up front that are most in demand, which allows the J2EE developer to take advantage of the best practices already deployed internally in the RDC. IBM donated the framework and example tags to the Apache Software Foundation last fall, and we made them available to interested members of the community through the Apache Taglibs

sandbox project. The financial value of this contribution was approximately \$10 million.

CIS: Many companies still don't understand why they need speech, or if they do, they don't understand what's involved in implementing it. How is IBM helping customers to understand the benefits?

Morse: We have worked with a variety of clients to successfully implement speech solutions. The best way to communicate the benefits of these solutions, and what's involved in implementing them, is to use case studies and to describe the dramatic return on investment that many companies achieve once the solutions are deployed. We share these stories on our Web site, in our press releases and in our advertising. We publish technical papers that describe the implementation effort. Most important, our worldwide sales, services and consulting teams show customers the benefits of speech in hundreds of one-on-one customer engagements every year, as well as at many industry trade shows and events.

CIS: What level of knowledge must a user possess in order to administer and make changes to call flows?

Morse: First, the adoption of the VoiceXML standard has changed the way we administer contact center applications. We have moved the business logic away from the proprietary interactive voice response (IVR) scripting language to the Web application server. This has been a game-changing event, as the administration and development of speech-enabled applications moves to the millions of J2EE developers, therefore opening up the ability to manage call flows to a much larger community of developers.

Second, IBM has Eclipse-based plug-ins, such as the Call Flow Builder. It allows for graphical drag-and-drop

By creating plug-ins to the Eclipse framework, we help developers leverage their existing skills in Web development to extend to speech.

modifications to call flows, making call flow maintenance an intuitive administrative step that does not require the knowledge of a proprietary scripting language.

The implementation of the call flows is also greatly simplified with the advent of VoiceXML. Preexisting scripts used for a particular task can be reused by the speech application, so there is no need to redevelop scripts for existing tasks.

CIS: What's the average implementation time, using a midsized company as an example?

Morse: The length of a speech implementation project is dependent on many factors. It should be broken up into several distinct phases, which include: business and application objectives; usability and human factors; business process integration; call flow design; development; testing; and deployment and post-deployment tuning. The final area that can impact the schedule is the level of training the customer has (which is why most of our initial deployments are done in conjunction with a very skilled systems integrator). Assuming all of these phases are included, implementation of a simple speech-enabled application can range from one to six months. A project of

# Getting your customers to *LOVE* Voice Automation

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medium complexity can take three to nine months, and a complex application takes six months to one year.

Using standards-based programming techniques such as VoiceXML, the development, testing and deployment elements can be done more efficiently by reusing applications and application components that the enterprise has already developed and deployed, thus reducing implementation time and ensuring a rapid return on investment.

CIS: Is speech technology feasible for smaller companies?

Morse: Speech is a technology that can offset contact center costs, which makes it a very good source of bottom-line return for small companies. Implemented correctly, it can also improve customer satisfaction and generate revenue through upselling and cross-selling. It allows a small company to establish a unique persona and to gain differentiation in the marketplace.

There are many IBM business partners that offer tailored speech-enabled

application solutions to small to medium-sized businesses. Although some small companies have the in-house expertise to deploy speech in their own environment, others may find it more cost-effective to outsource the speech elements, and a number of solutions are now available for them to do so. **CIS**

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## IBM Technology Aiding Children's Hospital ICU

*David R. Butcher, Assistant Editor, Customer Interaction Solutions*

As cited in the concerting interview with IBM's Bruce Morse, the pediatric intensive care unit of Miami Children's Hospital is one of the recent customers of the company's speech technology, provided in partnership with Teges Corporation.

IBM's WebSphere software is providing doctors with a way to enter and access patients' information using their voice, a keyboard or handwriting — via handheld, slate tablet PCs — for the purpose of improving response times in critical care units. With a medical staff of more than 650 physicians and 2,000+ employees, Miami Children's Hospital provides care for approximately 185,000 pediatric patients each year.

WebSphere will work with an integrated clinical information system that uses a single Web interface to give instant access to patients' information. Physicians at the hospital are using the technology to monitor pediatric ICU records in real time.

"The system will allow us to monitor patients hundreds of miles from our primary center," Dr. Anthony Rossi, director of Cardiovascular Surgery at Miami Children's Hospital, has said. "Patients, families and less-experienced clinicians will now benefit [...] virtually no matter where in the world they are located."

The WebSphere software integrates different modes of data entry — what the company calls a multimodal approach: speech, keyboard strokes and handwriting recognition technology, all integrated. The multimodal

approach provides physicians and nurses with the option of using spoken commands to both access patient records and enter repetitive information.

Physicians at Miami Children's Hospital's pediatric ICU use IBM's WebSphere technology combined with Teges' i-Rounds ("Internet Rounds") to provide the cardiac team with pediatric ICU records. It is based on the XHTML + Voice, or X + V, multimodal programming language, which is deployed using the WebSphere Everyplace Multimodal Environment.

WebSphere Everyplace Multimodal Environment software requires no speaker training, so it can be set up and used immediately. It allows speech to be recorded and stored as digital audio, then sent off for transcription.

Using the i-Rounds solution, nurses work on handheld tablet PCs — sort of like electronic clipboards — and patient data move wirelessly through a network to a server, thereupon being available to healthcare providers on a password-protected Web site. As the latest federal rules regarding medical records privacy must be taken into account, data such as test results, digital photos, billing and insurance claims are converted into standard Web pages generated with protection through encryptions and passwords.

The collaboration of IBM and Teges enables healthcare providers to technologically further the doctoral process, precipitating dramatic improvement in patient care quality. **CIS**

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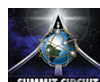


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# Curing The “Zero-Out” Habit While Improving Overall Customer Satisfaction

For many companies, the thought of introducing speech automation to customers immediately conjures up an unpleasant compromise: saving the company money while risking customer dissatisfaction, and a zero-out to speak with a live agent. Not only is there the chance of negating the savings, there is also a chance of endangering goodwill with the customer and losing his or her business.

Personal experience plays a strong role in molding opinions about automated self-care options. Many of us have encountered bad Web sites and horrendous touch-tone or “press-or-say” systems that actually encourage customers to build a “zero-out to an operator” habit. Recent advancements of technology and standards in the speech recognition area, however, are having a remarkable impact on engaging callers in more friendly and flexible dialogs without human intervention. A portion of the improvement in customer satisfaction with speech automation can be attributed to an evolution of speech standards. Standards within speech are creating a foundation for increased personalization and the ability to engage callers in exchanges that more closely mimic a conversation with a live agent through the support of recent advancements in database access and call flows.

## The Trickle-Down Effect Of Standards

The primary benefit of standards within a technology is not always apparent to the end user. According to Webster’s, a “standard” establishes a generally accepted model “by authority,

custom or general consent.” One of the most obvious benefits of technology solutions for end users is investment protection, whereas a lack of standards can lock someone into a relationship with a specific vendor with a proprietary solution. Callers trying to access information from a contact center do not care about these issues; they simply want their questions answered as quickly and efficiently as possible.

Evolving standards in the speech market are directly affecting how callers interact with automation and are providing investment protection for those deploying speech systems. One of the many benefits of the [VoiceXML \(define - news - alert\)](#) (VXML) standard within speech is the ability to deploy a distributed architecture that closely resembles Web-based models. One result is that it makes it easier for contact centers to repurpose existing data for speech, allowing detail such as account balances and personal information to be injected into audio dialogs that were previously the exclusive realm of a live agent. The

ultimate benefit for callers is that more pertinent information can be combined with even better speech recognition and user interface design. An automated solution becomes a pleasant experience, boosting customer satisfaction.

## Why Should Your Callers Care About VoiceXML?

Actually, callers *don't* care about VoiceXML. What they care about are ease of use, performance, reliability, access, etc. In many of these areas, VoiceXML contributes to increased value for contact centers that choose to explore not only how to reduce costs but also how to improve the quality of each customer interaction. It's not that VoiceXML is a secret sauce for success so much as it is a standard and supporting architecture that enables speech solution designers to more creatively craft applications that exceed expectations.

VoiceXML is the presentation logic for most speech systems being deployed today. A VoiceXML browser is the primary component used to retrieve and parse application code, as well as to handle data exchange between speech recognition/TTS servers and database access. Definition of the VoiceXML standard

By Ted Cwiok  
Convergys Corporation



within specific boundaries allows vendors to create highly distributed architectures.

For example, the VoiceXML browser, speech recognition software, media server both for prompts (i.e., audio guidance) and for grammar (i.e., words that can be recognized), application server and caching server could all be in separate boxes and even distributed across multiple locations. This might initially seem unnecessarily complex. However, the value beyond performance considerations is flexibility of ownership, control and security. One result is integration of speech beyond what was previously considered a stovepipe application within the telephony organization.

This is where the rubber meets the road for callers with respect to VoiceXML architecture. Vendors are incorporating existing data for callers to enable consistency across multiple contact channels, such as Web-based and even agent-assisted interactions. Security also plays a role, as contact centers can now take advantage of the hosted speech systems while maintaining sensitive information within their facilities.

A great example of this approach is that of a large financial services firm. Customers using their telephones can check their balances, move funds or even find the nearest [ATM \(define - news - alert\)](#). All sensitive information is maintained within the confines of the bank, while critical telephony and speech hardware and software required to answer calls and navigate automated dialogs are hosted by an outsourced speech service provider. Results do not only include improved customer service, as company executives are also better able to focus funds and internal personnel on core banking infrastructure. This new hybrid architecture is enabled in part by the flexibility of VoiceXML.

#### Application Server Is the Key

A Web-based model for speech is actually a good analogy. An application server within a VoiceXML environment operates very much like a Web server for creating pages for viewing over the Internet.

A speech application server maintains the VoiceXML application with its associated call flow, prompts, grammars and direction for database access. Uniform resource locators (URL) are used to identify where the appropriate data or prompt files must be retrieved.

This model frees the speech application from what was previously a difficult-to-update static system. Pre-VoiceXML systems usually locked companies into a hardware model wherein the system administrator had to be educated on myriad proprietary procedures and coding schemes. An interesting byproduct of the architectural flexibility of VoiceXML is the ability to control the application server ("the brain") by the company or a partner offering a packaged speech solution.

#### Performance Is Critical

Performance is a critical issue for speech systems, especially when distributed systems introduced wide area networking connectivity and in essence more moving parts that could fail. Dead air is one of the worst of all outcomes in a speech system, as callers simply do not have any of the visual cues available with Web-based access. As a result, systems invisible to callers but essential to success must be in place. These include caching servers to supply grammars for speech recognition, geographic redundancy for all servers and telephony access, as well as constant monitoring for all components, from database access to local/wide area network uptime and server uptime.

#### Security

The opportunity to take advantage of a distributed architecture enabled by VoiceXML can reduce the risk of a security breach by deploying a distributed architecture. In this scenario, the data repository for a speech system is independently located and secured from the rest of the speech system, whether it is in a hosted environment or simply located elsewhere within an organization. However, emphasis must be placed on the security of the links by utilizing virtual private

Dead air is one of the worst of all outcomes in a speech system, as callers simply do not have any of the visual cues available with Web-based access.

networks, mutual authentication, etc.

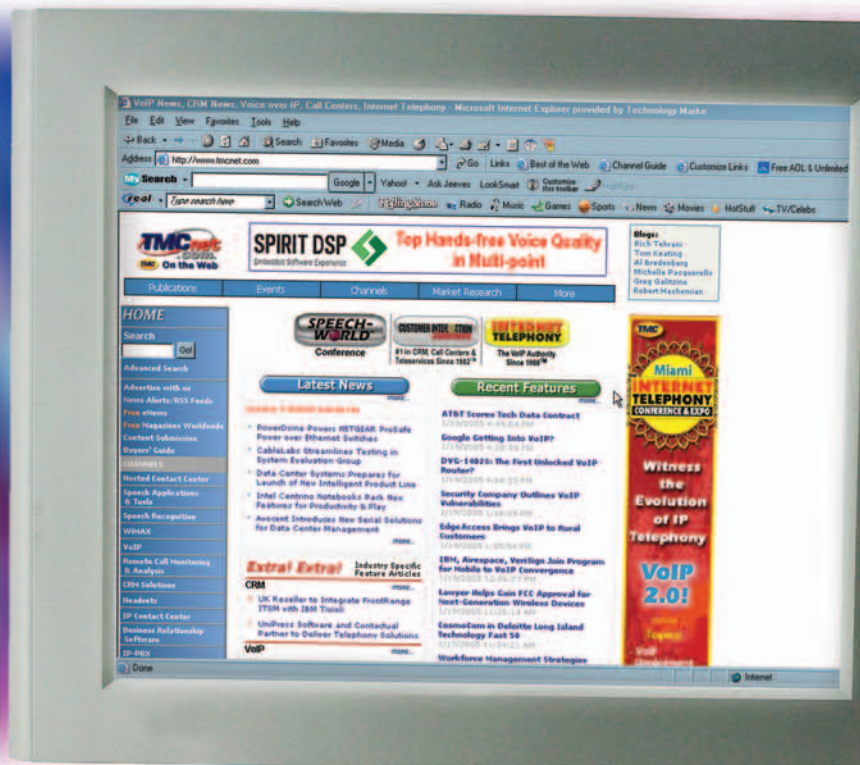
It's easy to pigeonhole VoiceXML as just another protocol in the never-ending alphabet soup of technology jargon. The difference with this standard lies in that it is encouraging new methods of delivering automated contact center solutions that are having a positive impact on customer satisfaction.

The catalyst is not simply a maturing speech market where consistent code promises application portability. It is also the embodiment of a Web-based architecture that is gaining traction across many industry segments in both large and small organizations. The results are that many new speech applications are shattering previously conceived notions, with automated solutions that dramatically reduce the chances that a customer will zero out while greatly improving overall customer satisfaction. **CIS**

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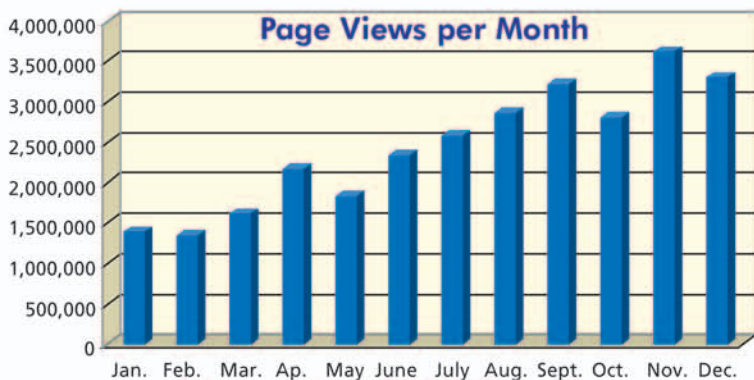
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CommWeb.com	Not in Top 100,000
CallCenterMagazine.com	250,937

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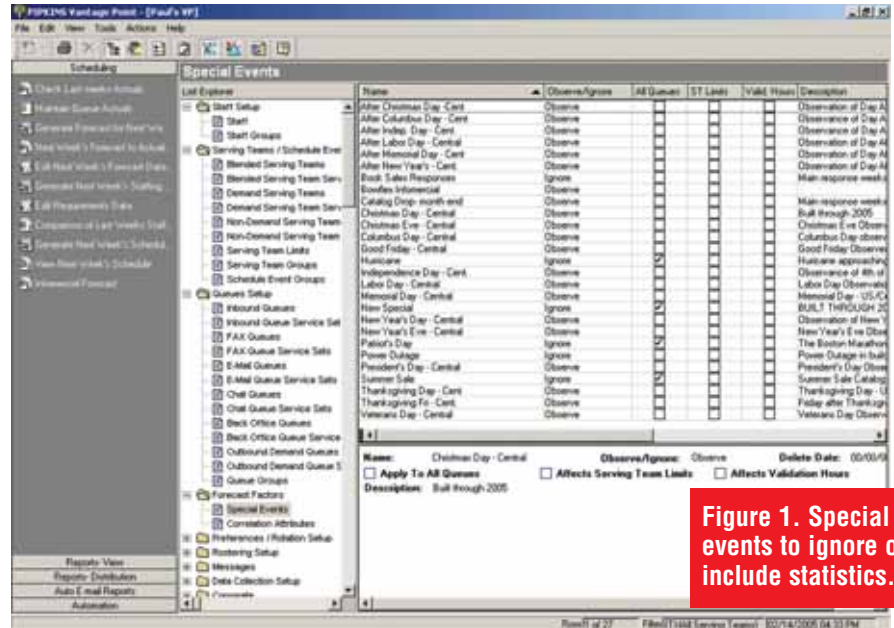
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In simple terms, workforce management (WFM) is the process of balancing work to be done and the amount of resources needed to complete that work. Workforce management solutions must analyze and predict a call center's workload by the day, by the hour and even by the minute, then allocate resources accordingly. If the work volume is not accurately predicted ahead of time, then the resources allocated may be incorrect, resulting in overstaffing (which is expensive) or understaffing (which leads to poor customer service and higher customer dissatisfaction).

Typically, most WFM (define - news - alerts) solutions allow users to define thresholds for the "quality of service," which is typically the average hold time. Using predefined objectives (such as staffing requirements), historical ACD data and a complex formula, call center managers and supervisors can predict or forecast the amount of work expected to be completed within a specified amount of time. Once the work volume and staffing requirements have been forecast, the optimal scheduling of resources can be created. WFM solutions must incorporate fluctuating work volume and shift patterns in their calculations. In addition, varying skill-sets of employees and individual preferences must also be considered when



**Figure 1. Special events to ignore or include statistics.**

producing a viable schedule. TMC Labs examined Pipkins (news - alert) Maxima Advantage Vantage Point, an enterprise WFM product featuring comprehensive scheduling, forecasting and planning functionality for complete, enterprisewide, multisite call center workforce management. It includes all of the aforementioned capabilities, and we were quite impressed with the product during our test drive.

Maxima Advantage is designed to handle complex call center forecasting and scheduling problems with what the company claims is "the best and most accurate WFM scheduling formula on the market today." Because of its scalable architecture, Pipkins can focus on call centers of all sizes, from the small business segment to the largest of call centers. In fact, Maxima Advantage Vantage Point is a true client-server architecture, combined with an Oracle database and the Windows NT/2000/2003 operating system.

One important feature of any WFM solution is the ability for intraday "tweaking" of the schedule, which does not end with the creation of an optimal schedule. For instance, unexpected changes occur in employee status —

such as sick days — or the need to re-allocate resources to unexpected volume increases in a particular skill-set. Workload conditions must be constantly monitored and adjustments made as necessary. Maxima Advantage handles this quite well. Daily Management facilities offer an up-to-the-minute view of call center performance. This includes current call handling statistics and immediate staff whereabouts, which can detail problems in schedule adherence. Of course, this solution supports "special events," which might consist of a holiday or an anomaly in statistics due to a hurricane or power outage. (See Figure 1.)

- Other features include the following:
- Advanced forecasting with patented Merlang algorithms;

**RATINGS (0-5)**  
**Installation: 5**  
**Documentation: 4.5**  
**Features: 5**  
**GUI: 4.75**  
**Overall: A**

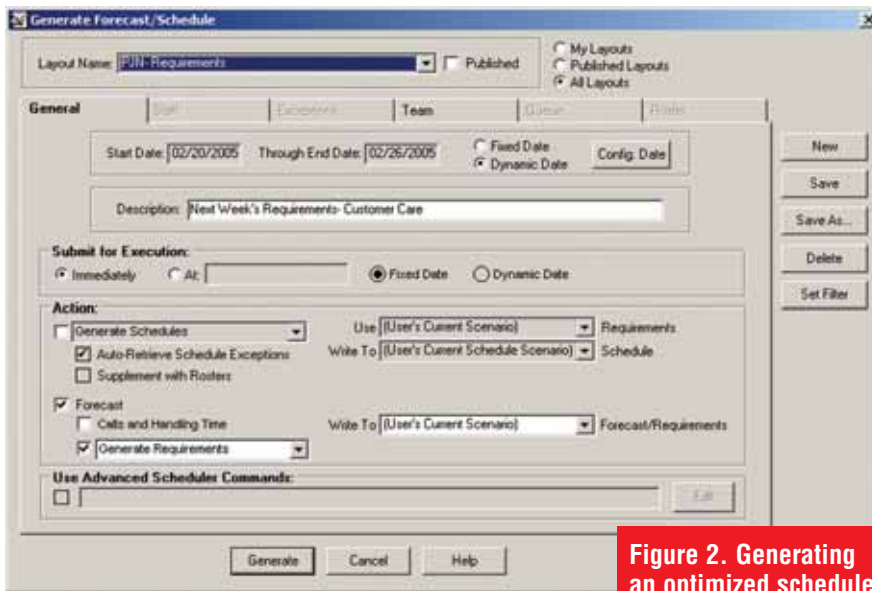


Figure 2. Generating an optimized schedule.

- Scheduling in skills-based environments, using SkillSense technology;
- Easy-to-use point-and-click graphical schedule management tools;
- Total ACD integration for data collection across multiple sites and time zones;
- Workload distribution/automation with Multiple Application Server (MAS);
- Comprehensive analysis and reporting capability;
- Complete multisite management;
- Attendance preferences;
- Support for multimedia environments;
- Open architecture/ODBC access;
- Live real-time adherence monitoring; and
- Web access module for agents.

The latest new features:

- Scenarios (perform “what-if” operations);
- Filters (wherein data can be filtered to many levels for easier management);
- Linked shortcuts (perform multiple repetitive operations with a single click);
- Scheduling reoptimization; and
- Interactive voice response (IVR) interface.

Other recent additions include e-mail integration, automated data exports, WYSIWYG (“what you see is what you get”) report distribution, budgeting Vantage Point, data-level security and filtering and agent productivity/statistics reporting.

tics reporting.

We all know ACDs that support skills-based routing can place calls into different queues and are then presented to single-skilled or multiskilled agents. Skill-set scheduling is the ability to optimally schedule multiskilled agents to meet an integrated set of multiskilled requirements. Maxima Advantage is able to optimize and generate a schedule (see Figure 2) that incorporates skill-sets into its calculations to help prevent overstaffing or understaffing in any particular skill-set. Should an agent call in sick, for example, Maxima Advantage can also determine what effect this would have on a particular skill-set. Real-time reports display real-time agent adherence to each skilled activity. These reports show the call center supervisor which activity the agent was scheduled to perform and which activity the agent is currently performing, giving to supervisors real-time visibility of each skill type. You can also customize charts and graphs or use third-party tools to pull information from the Oracle database. With this information in hand, you have the capability to perform intraday re-forecasting.

Additionally, Pipkins claims Maxima Advantage to be the only system that can directly calculate optimal staffing levels for your agent skill groups, using the Merlang-M equations, which the company says eliminates the need for simulations. In fact, Pipkins rhetorically

asks, “Are your calls generated by promotional mailings, catalog drops or other marketing events?” Its own answered solution: “Well, Maxima Advantage goes far beyond traditional forecasting methods, providing you with a way to directly correlate your marketing activities with anticipated call loads.” The ability to forecast based on statistics from, for example, a past marketing promo, is a huge benefit. And it certainly helps improve the statistical forecasting formula immensely.

We encountered some interesting features within Maxima Advantage that might be considered “icing on the cake.” For instance, you can terminate employees, then reinstate them — useful for seasonal employees — and still retain their information, statistics, skill-set information, etc. This eliminates the need to start from scratch in removing a seasonal agent only to have to add him or her in again later. The product takes seniority among agents to a new level, as it includes both the date and time of hire; if you hire 10 agents in one day, you can determine seniority by the time the agents were hired. Another interesting feature lies in that, when scheduling, you can assign multiple supervisors to an agent with a priority setting to figure out which supervisor to assign the agent. The product defines offices with time zones so agents are able to see schedules in their time zone.

Using Maxima Advantage, you can supplement with roster groups to determine how many hires are needed, then pass that information to an HR person.

Finally, a Web-based vacation feature can tie into HR and payroll, allowing you to color-code the days an agent is on vacation. Overall, TMC Labs was very impressed with the performance and feature-set of Pipkins’ Maxima Advantage. The scheduling algorithms are, indeed, one of the best in the industry; as such, we find this to be a terrific solution to meet your workforce scheduling needs. **CIS**

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By Tracey E. Schelmetic  
 Editorial Director, Customer Inter@ction Solutions

## Life In An On-Demand World

You can't read more than two paragraphs in the business news nowadays without running into the phrase "on-demand." It's everywhere, including in the pages of this magazine. What a brilliant, long-awaited concept: functionality delivered in a way in which we only pay for what we need and use. It's the antithesis of those long years in which we were all forced to pay \$18 for a CD that contained only two songs we actually wanted. (Remember Men Without Hats and "The Safety Dance"?) Pay-for-download (we won't mention the long years of pirating that came before that) has enabled us to eliminate the music we don't want and pay for what we do. This is a consumer application of the on-demand concept.

But let's stop to think what the on-demand principle might look like in other aspects of private life.

Do you remember what fun it was to open a new box of 64 Crayola crayons? If you were like me, you dragged crimson or purple out first, or maybe one of those silver, gold or copper metallic colors. Do you also remember wishing you could ditch the obligatory pea-soup green, dun brown, flat gray, nauseating sulfur yellow and the white crayon? (OK, kids who drew on black paper liked the white crayon, but they were always a bit weird.) Imagine being able to specify which 64 crayons you saw when you opened the box: purple, pink, silver, fluorescent orange, sky blue, indigo and, of course, burnt sienna — not a single litter-box-gray or improbable "flesh" tone crayon among them! If I could do that, I'd STILL be coloring in my spare time.

Here's another instance: produce shopping. How many times have you stood in the produce aisle with a quart of packaged strawberries in your hand? You like the berries on top, but you discover, after much twisting, turning and peering, that there's a suspicious-looking one on the bottom, about 10 minutes away from converting from suspicious-looking to fuzzy, gray and squishy. I'd like to be able to open the package and examine them all, put aside the dodgy ones, and keep the ones I like. Same goes for items like celery: personally, I hate celery, but I need to buy it sometimes when I'm making a pot of soup. Nobody sells one celery stick; you have to buy the whole tree. I implore supermarkets of America to immediately begin on-demand vegetable delivery.

What about car shopping? I might like the comfortable interior of my car, but dislike the body design. I might like the steering of a different car, the heated seats of another and

the reliable brakes of yet another. Instead, the only decisions I have when buying a car is color, whether or not to take the fantastically overpriced and underperforming audio system, yes or no on floor mats and what the wheels should look like, a decision that seems to make a difference of several thousand dollars for reasons I still cannot fathom. I'm hoping some day to see many car companies operating in cooperation, allowing customers to build their own cars online, like virtual Lincoln Logs or Mr. Potato Head, and top the whole thing off with a Jaguar hood ornament.

Let's move on to restaurants. I'm not a big fan of lettuce, but I do like salads that have tomatoes, carrots, cucumbers, broccoli, mushrooms and other vegetables, in a salad bowl, with salad dressing. Maybe croutons if I'm feeling daring. By and large, when I ask for a salad without lettuce, the server looks at me as if lobsters were crawling out of my ears. In an on-demand restaurant, there would never be any need to pick out the bits you don't like from any dish. Dessert, too, would be delivered in an on-demand fashion. Have you ever seen the dessert cart go by and joked with your dinner partner that you wished for a small bite of everything? Well, why should we have to choose between the white chocolate mousse cake, the tiramisu and the raspberry torte? Even if you could fit (or afford) full orders of all three, what if you missed the apple crumble that night when it was at its very best?

Opportunities in life go by all the time, and I, for one, look forward to a more on-demand world so I miss fewer of them. **CIS**

*The author, who has deliberately avoided treading the territory toward on-demand dating, despite much temptation, may be contacted at [tschelmetic@tmcnet.com](mailto:tschelmetic@tmcnet.com).*

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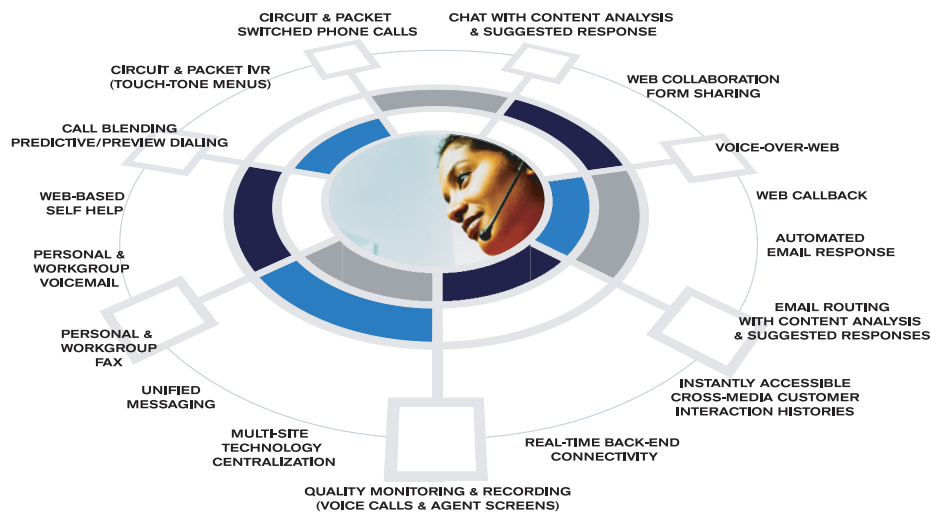
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