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- 2005 Product of the Year Winners
- TMC Labs Examines Cincom's Synchrony
- Hosted CRM For The Contact Center
- The CEO Spotlight On Mercom

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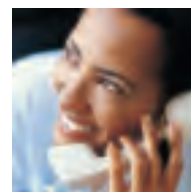
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By: Nadji Tehrani,
Founder, Chairman & CEO, Editor-in-Chief,
Technology Marketing Corporation

# Welcome To The 25th Year Of Leadership And Commitment To Excellence…

## In Call Centers, CRM Centers And Customer Interaction Centers

Part II

In my December 2005 editorial, I covered just a few of the highlights of what has happened since 1982 when this publication laid the foundation for the existing call center, CRM and customer interaction industries.

### Much Has Happened In The Last 25 Years

Nationally speaking, over the last 25 years, many companies have come and gone while very few continue to prosper in the Fortune 500 rankings. For example, companies such as General Electric, Exxon-Mobil, Citigroup and IBM have continued to prosper in the last 25 years. However, many companies have been unable to maintain such a prestigious ranking at the top of the Fortune 500 list. For example, General Motors

> **I would classify the performance of our call center, CRM and contact center industry as follows: "The great ones elevate their performance in times of need." That is precisely what our industry has done in times of need, and that also explains why our industry continues to prosper in light of limiting legislations, abuse of our industry, offshoring,**

and Ford Motor Co. have traditionally been in the top five ranking of the Fortune 500, but unfortunately they are currently facing possible bankruptcy. AT&T, which was ranked number five in the Fortune 500 list, with revenues of $75 billion and profits of $4.7 billion in

1995, no longer exists as an independent company and is now part of SBC Communications.

If you compare the changes in the top 20 rankings within the Fortune 500, you will be amazed at the considerable amount of changes that have taken place due to a variety of reasons: among them, mergers and acquisitions, bankruptcies, etc. Please refer to Figure 1 for the comparison of changes in the top 20 companies in 1980 versus 2004.

By comparison of the above companies listed in Figure 1, while allowing for mergers, acquisitions or companies going from public to private, etc., one can make the conclusion that "the cream always rises to the top"!

### Contact Center/CRM Industry Continues to Enjoy Enviable Growth

In my opinion, the contact center industry has also risen to the top over the last 25 years in spite of many significant problems that our industry has faced. Over the last 25 years, our industry has had many ups and downs, but as a viable and much-needed industry, we have always risen to the occasion. I would classify the performance of our call center, CRM and contact center

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industry as follows:

"The great ones elevate their perform-ance in times of need." That is precisely what our industry has done in times of need, and that also explains why our industry continues to prosper in light of limiting legislations, abuse of our indus-try, offshoring, etc.

Indeed, many technology-providing SMBs are growing at 40 to 50 percent per year (see "The Boardroom Reports" at www.tmcnet.com/228.1), while well managed teleservices companies are growing at 20 to 25 percent per year!

## Over The Last 25 Years, We Have Been Intimately Involved With Our Industry

Since the inception of this publica-tion in June 1982, our paramount objective has always been to provide unbiased, useful and practical informa-tion to our readers. In short, we have taken the responsibility of educating the industry seriously. I feel that this explains the enormous respect that the industry has for TMC, *Customer Inter@ction Solutions®* and the hard-working employees of TMC for having done such an outstanding job over the last 25 years to lay the foundation for our great multibillion dollar call center, CRM and contact center industry.

## Close Contact With CEOs On A Regular Basis

As I have always indicated in these edi-torials, one of the most interesting parts of my job is to remain in contact with the CEOs of our industry and learn from them and offer advice when requested. During these extremely informative "give and take" sessions, not only have I learned a considerable amount about where the industry is and where the industry is going, but also have formed a clear vision for the future of our industry, which is shared by nearly all of the CEOs that I am in contact with.

## Supporting The Industry In Many Ways

Over the years, I have always made it our number one responsibility to get involved whenever the wellbeing of our industry is on the line. For example, on

| Figure 1. Top 20 Fortune 500 Ranking: | | | |
|---|---|---|---|
| **Year: 1980** | | **Year: 2004** | |
| Rank | Company | Rank | Company |
| 1 | Exxon Mobil | 1 | Wal-Mart Stores |
| 2 | General Motors | 2 | Exxon Mobil |
| 3 | Mobil | 3 | General Motors |
| 4 | Ford Motor | 4 | Ford Motor |
| 5 | Texaco | 5 | General Electric |
| 6 | ChevronTexaco | 6 | ChevronTexaco |
| 7 | Gulf Oil | 7 | ConocoPhillips |
| 8 | Intl. Business Machines | 8 | Citgroup |
| 9 | General Electric | 9 | Intl. Business Machines |
| 10 | Amoco | 10 | American Intl. Group |
| 11 | ITT Industries | 11 | Hewlett-Packard |
| 12 | Atlantic Richfield | 12 | Verizon Communications |
| 13 | Shell Oil | 13 | Home Depot |
| 14 | U.S. Steel | 14 | Berkshire Hathaway |
| 15 | Conoco | 15 | Altria Group |
| 16 | DuPont | 16 | McKesson |
| 17 | Chrysler | 17 | Cardinal Health |
| 18 | Tenneco Automotive | 18 | State Farm Insurance Cos. |
| 19 | AT&T Technologies | 19 | Kroger |
| 20 | Sunoco | 20 | Fannie Mae |

several occasions in the 1990s, I was involved with the FTC, giving them input and guidance on rule making. I have made dozens of public speaking appearances worldwide on behalf of the industry and in support of the industry.

Along the way, we have published thousands of articles, several books and audio cassette training sources for our industry. In plain English, we have accumulated by far the largest source of information over the last 25 years, more than any other source in the world. More than anything else, this is proven by the fact that our Web portal, TMCnet.com, ranks as number one on

Google in over 50 relevant terms. Indeed, I am extremely proud of the achievement of our TMC staff.

## Industry Recognition

As the industry's leading magazine since the inception of this publication in 1982, it has been our responsibility to recognize outstanding performance in every facet of our industry. Indeed, the awards earned by deserving companies appear worldwide in CEOs' offices (see Figure 2) or the libraries in advertising agencies or in the entrances of many, many companies that have supported our industry for the last 25 years. The



Figure 2.

Nadji Tehrani and the Chairman of the Board of Directors and CEO of SR. Teleperformance, Christophe Allarde, meet in Paris, France. In the background, several TMC-sponsored awards (Top 50 Teleservices Agencies Ranking) are displayed on the wall. SR. Teleperformance is the global leader in outsourced teleservices.

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following is a list of awards that TMC editors and TMC Labs engineers have bestowed upon the industry:

- MVP (Marketing Via Phone) Quality Awards;
- Top 50 Teleservices Agencies Ranking, Inbound And Outbound;
- CRM Excellence Awards;
- Product of the Year Awards;
- Speech Technologies Excellence Awards;
- IP Contact Center Technology Pioneer Awards;
- TMC Labs Innovation Awards; and
- TMC Best in Class Awards.

### Informing The Industry About New Trends And Applications

Among many other things, we have always believed that informing the industry about the latest technological developments and new concepts in conducting cost-efficient and superior call center operations has been our greatest responsibility. Over the years, we have informed our readers about the hardware, software and services available to our industry that increase productivity, reduce costs and help develop competitive advantage.

Some of the new technologies and services that were introduced to our readers in the last several years include the following:

1. VoIP;
2. IP contact center technologies;
3. Speech technology;
4. Hosted/on-demand technology delivery;
5. Outsourcing;
6. Offshoring/nearshoring/ homeshoring;
7. Integrated marketing;
8. Positioning;
9. Differentiation;
10. Online marketing;
11. SEO – search engine optimization;
12. Channel marketing;
13. Last, but not least, we most recently presented the "12 Commandments Of Cutting-Edge Marketing," which encompass the new evolution in marketing; namely, how to maintain competitive advantage by using conven-

tional as well as online marketing skills (see www.tmcnet.com/229.1).

### The Humorous Section Of Our Industry — A Few Of Fhe Funny Things That Have Happened In Our Industry In The Last 25 Years

In my humble opinion, maintaining a good sense of humor is the key to success and to a happier life. In fact, I couldn't imagine anyone living a happy life without a good sense of humor or enjoying humorous things. Having said all of that, as I promised you in the last issue, I would like to share some of the funny things that have happened along the way.

### Telemarketing Proved That You Can Do Business Sitting on Your Ass!!

For years, I was told that to be successful in selling, you must be a traveling salesperson. In fact, in my early career with a leading chemical company, my supervisor (the sales manager) gave me a tie clip on which the following initials were engraved:

"YCDBSOYA" — You Can't Do Business Sitting On Your Ass!!

My supervisor wanted me to be on the road all the time because it was his belief that you simply cannot sell anything while sitting in your office (to put it politely)!

Long ago, Larry Kaplan, CEO of TeleBusiness USA, called me one day and asked me, "What is the greatest achievement of telemarketing?" While I was trying to think of so many things that our industry has produced for the business community, Larry could not wait. He asked, "Do you want know?" I said, "Yes." Larry said, "Telemarketing has proved that you **CAN** do business sitting on your ass!"

### The Mexican Story

In the mid 1990s, I received a late evening phone call from a gentleman in Mexico City. For the sake of this discussion, we will call him Mr. M. He told me that he was interested in setting up a call center in Mexico City in the next 60 days to sell products for the forthcoming Christmas season. I should mention that this call was received on or about the first of August, 1995. I asked Mr. M., "Do you have any idea what type of telemarketing you would like to do and what kind of hardware and software you need to do that?" His answer was, "I have no idea. You tell me what to buy and that's what I will buy!" I asked him how he came across my name. He said he went to the phone company, who showed Mr. M. *Telemarketing*® magazine, and also showed him a photograph of my editorial page. The phone company executive said, "Call this man and whatever he asks you to do, you do it." Then Mr. M. suggested that he come to Connecticut to see me the following day for lunch. I could not believe his enthusiasm, and finally agreed to have lunch with him. Sure enough, the next day, at 1:00 pm sharp, a black stretch limo pulled into our parking lot, and we went to lunch together. He stated that he had great plans, great funding and he needed my advice to build this call center. I referred him to several leading consultants and technology providers to help him decide what was best for his particular application. I even invited him to come to our TBT

> **IMPORTANT:**
> Please remember where you **first** read this pioneering effort before the copycats copy us (as usual) and pass it off as their own.

### Announcing Our Newly Redesigned Web Site:

I urge you to visit TMCnet.com, which is the **world's No. 1 communications and technology Web site.**\* No other Web site covers quality information on CRM, contact centers and teleservices, as well as VoIP, like TMCnet.com. This claim has been verified by WebTrends and by being No. 1 in 50 relevant search terms on Google. Last, but not least, TMCnet.com has been ranked in the top one percent among all Web sites worldwide based on traffic.\* Indeed, we are very proud and humbled!          *\*Sources: Alexa.com ranking and WebTrends*

conference, the industry's leading trade show at that time, and speak to other vendors so he could make the right decision.

Because Mr. M. was in such a rush, his entrepreneurial impatience blinded him to the need to research before he invested. He ignored the advice of industry leaders. The bottom line, he lost millions of dollars buying incompatible hardware and software, and practically forced the formation of the call center in about 40 days without any knowledge of the industry.

Upon completion of his call center, Mr. M. called me again at 8:00 pm in my office and said, "Mr. Tehrani, I spent a fortune buying everything and nothing is working in my call center. Can you come down and tell us what we are doing wrong?" As such, I was invited to his house in Mexico City along with 50 or 60 other guests and, as it is a tradition in both the Old Country and Mexico City, everyone arrived about an hour late, and the goodbye process took more than two hours! I must add that again, like in the Old Country, the party was composed of all men on one side and all women on the other side. All of this looked very normal to me, considering where I grew up. During the evening in Mr. M.'s house, everything was social talk: nothing about business. The next morning, I visited the call center and I couldn't believe my eyes! While Mr. M. had spent millions of dollars buying hardware, software and infrastructure, his employees were doing everything manually in the call center!! I asked Mr. M., "What is the sense of buying technology if you are going to do everything manually?" Mr. M. said, "Mr. Tehrani, let me teach you something about my philosophy which says: It is more important for our customer to think that we know what we are doing as opposed to whether or not we really know what we are doing!" As expected, the business failed shortly thereafter!

As always, I welcome your comments. Please e-mail me at ntehrani@tmcnet.com.

*Sincerely yours,*
*Nadji Tehrani*
*Founder, Chairman & CEO, Editor-in-Chief*

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When choosing a HOSTED CRM PROVIDER,

# BUSINESS IMPACT COUNTS.

| | Deployment | Adoption | Support | Business Impact | Vendor | Overall* |
|---|---|---|---|---|---|---|
| **Siebel CRM OnDemand** | ● | ● | ● | ◕ | ◗ | **4.4** |
| Salesforce.com | ● | ◔ | ● | ◑ | ◐ | 3.6 |
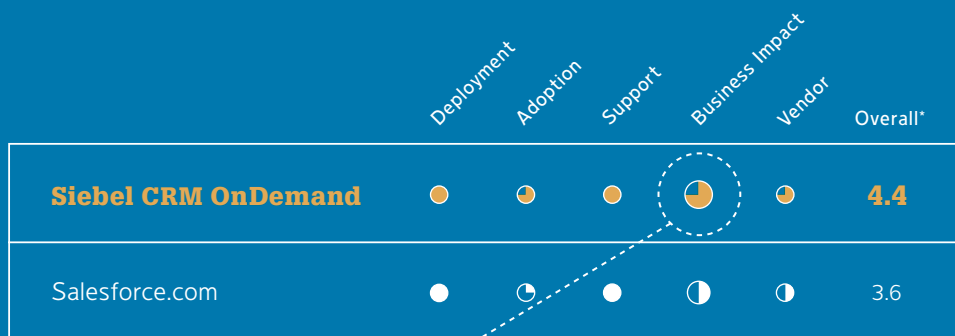
Source: Nucleus Research, May 2005

*Ratings: High=5 to Low=0

Simply put, results are everything. That's why in a recent independent analysis, customers rated Siebel CRM OnDemand #1 in the all-important category of business impact. Not to mention #1 overall. But with 11 years of CRM expertise working with 3.2 million live users from the world's most customer-driven companies, that shouldn't really come as a surprise.

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# Contents

**50**

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˙InfoCision is the only teleservice company to win the MVP Quality Award (presented by *Customer Interaction Solutions* magazine) all 12 years since its inception.

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## TMCNET.COM ONLINE EXCLUSIVES

**Managing Chaos In Your Contact Center**
*For most companies, the critical juncture between a happy customer and one that's headed for the door, even virtually, is determined by which CRM philosophy they subscribe to.*
*Read the full article at www.tmcnet.com/224.1*

**How To Dial Into The Burgeoning Market For Smart Phones**
By Chris Greendale, Kodiak Venture Partners
*With higher speeds and bandwidths, compression of power onto ever smaller devices, and fast, secure communications driving a broader range of functions, the potential for completely mobile, lifestyle-based computing is growing.*
*Read the full article at www.tmcnet.com/225.1*

**AnswerNet: Almost Famous**
By Gary Pudles, AnswerNet
*When you watch a popular TV program such as The Apprentice (is there an Inc. reader who doesn't watch it?) there is a huge array of small businesses that make it happen behind the scenes, and sometimes even in front of the scenes. In a recent episode, we were one of those out in front.*
*Read the full article, an excerpt from Inc., at www.tmcnet.com/226.1*

**Forrester Looks at CRM Best Practices, Part 3: Pitfalls**
By David Sims, Contributing Editor, TMCnet
*CRM technologies are a means, not an end. Tools, not ends in themselves. If you want to drive a nail, the niftiest screwdriver in the world is useless to you. Define CRM objectives and the business process changes necessary to meet the objectives before considering a technology purchase.*
*Read the article at www.tmcnet.com/227.1*

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

# Deconstructing
# The Call Center

From where I stand here at the beginning of 2006, I see a slew of new and existing Web standards slowly being woven together to more tightly cement data flows between disparate vendors such as multiple outsourcers or home agents. Call centers are rapidly being deconstructed and integrated in news ways in order to enable companies to more rapidly integrate their organizations and data in a multisourced world. Following are some examples of this trend.

### The Moth That Changed Everything

Approximately five years ago, I ran into Prem Upaluru, an enthusiastic visionary who at that time told me about all the next-generation things his company, Telera, was doing for customers. When I heard what the company was up to, I wrote an article called "Survival of Your Species" (www.tmcnet.com/223.1) explaining how Telera is a company specifically adapted to the Internet age. I used a story about the moth population in the UK to support my argument for adaptation and survival of the fittest.

You see, just prior to the industrial revolution, a certain species of off-white moth flourished in Birmingham,

England due to its exceptional camouflage abilities, which allowed it to blend in with the surrounding vegetation. Once large amounts of carbon-based emissions were released into the air, the

trees where the moths lived became black with soot.

It just so happened that about one percent of the moths were born black naturally. Prior to the industrial revolution, this was not a favorable trait. After the revolution, the black moths flourished on the black trees, and the lighter moths were picked off by predators. Once the pollutants were reduced from the air and the trees reverted to their pre-industrial-era state, the moths began to turn off-white again. The entire moth population changed from off-white to black and then back again.

In the article, I stated that Telera was the first "black moth" of call center technology in the Internet Age. The company billed itself as a business communications ASP, and they were one of the first companies to adapt their technology to help call centers take advantage of the inherent flexibility of the Internet. Telera's service was standards-based and ushered in a new era of services performing tasks that standalone equipment of the time was just not able to handle.

Fast-forward to the third quarter of 2005, when I received a call from Prem telling me he had something new to show me. I knew that Genesys

> **"The future of communications must involve more rapid dissemination of data and more effective
> use of technology to enable decision making."**

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## Wireless Office Telephone System DW800

Sennheiser Communications has entered the field of wireless, with an excellent system offering great flexibility and superb design. If you already enjoy the benefits of a Sennheiser Communications telecom headset, the DW800 gives you the added freedom to move around the office while on the phone. The telephone controlling interface TCI 01 completes the wireless package, conveniently enabling you to answer calls and hang up again while away from your desk.

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**PC145**

## Office and Contact Center Headsets

When you have to concentrate, and attention to detail is important, Sennheiser headsets help you to stay on top of the job. Light and comfortable to wear, you are free to work without distraction. Five brand new Office headsets (SH Series), and five state-of-the-art Contact Center headsets (CC Series) bring you top-quality performance and design.

## The perfect gear for Gaming and Internet Telephony

Game playing and internet surfing on your PC will become a totally new, exciting experience. Noise cancelling microphones, inline volume controls and microphone mute functions are among the many benefits of Sennheiser's PC Series. Networking? Take advantage of our business and leisure headsets—your interface to Voice Over IP technology. They're exceptionally comfortable and will easily turn your internet-telephone calls into hours-long, inexpensive fun.

**SH330**

**CC520**

**CC530**

## SENNHEISER
### COMMUNICATIONS

had purchased Telera a few years back, and I was wondering what Prem was up to.

I was pretty excited to hear that he has started a new company called Transera (www.transerainc.com), (news - alert) which sells global, on-demand IP contact center solutions. On the surface, the idea didn't seem so radical as it sounded five years ago and, in fact, the new service sounded similar to the old one. I was eager to hear what was new and what the differentiators of this new company might be.

Transera claims to be the only company in the call center market with a technology platform developed expressly for multisourced call centers. Their global Midpoint Call Management platform makes it possible for enterprises and their outsourcers to connect and collaborate to efficiently and cost-effectively manage disparate call centers. The technology can also be applied to home agents or multiple geographically distributed corporate centers.

The service allows you to match calls to available capacity for any call and any agent, regardless of location or technology infrastructure, without the need to reconfigure the various call center platforms. The goal is to allow customers of the service to react immediately to changing business conditions and adapt global call management strategies in real-time.

The company provides a browser-based dashboard and a service management portal, enabling enterprises and outsourcers to collaborate on call distribution strategies and service-level optimization. The service management portal provides access to statistical data, historical reporting, call monitoring and recording across heterogeneous call center operations. Generally speaking, more visibility means more service-level optimization and better customer care.

Callers are matched with best available agents through Transera's intelligent call control gateway that performs call management functions, including routing, queuing, conferencing and transferring of callers, regardless of location or technology infrastructure. Call distribution strategies can be modified centrally without the need to reconfigure each call center platform.

Transera is an advocate of open standards such as SIP (define - news - alert) , XML, CCXML, VoiceXML and SOAP (see definitions in sidebar) while interconnecting with off-the-shelf components such as media gateways, media servers and PBXs. Application functionality for intelligent call routing, workforce management, outbound dialing, IVR and business intelligence solutions is extended across disparate call center operations.

The service is based on an architecture the company calls Seratel, collaborative call management software. It is designed to be fault-tolerant, standards-based and able to connect multiple workgroups and corporations seamlessly together as they provide service to customers. (See Figure 1.)

The network infrastructure represents the TDM and IP media paths within a voice network. Included in this layer are standards-based soft switches, media gateways, media servers, call servers and connectivity with voice trunks. Whether these networks are private and owned by the enterprise, or are shared resources owned and operated by a communications carrier, Seratel directly interfaces with these components to provide end-to-end call management across multisourced sites. Seratel delivers Midpoint Call Management, which enables Transera to remain in the midpoint of the call, and provide end-to-end call management throughout the life of the call.

Seratel uses these network components to perform global call center functionality, including call queuing, dynamic call treatments, routing, quality monitoring, recording, managed transfers, announcements and multi-



Figure 1.

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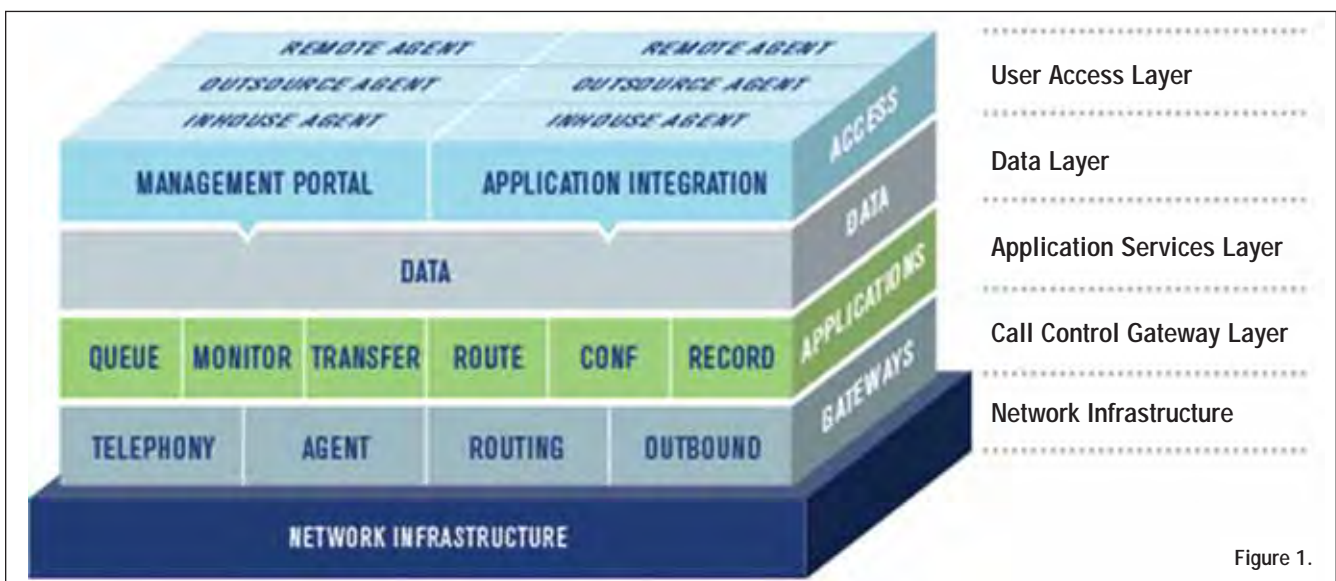
party conferencing.

Seratel uses SIP signaling from network components like media gateways in the customer's or service provider's infrastructure to set up and manage calls, and supports both TDM and IP. The Call Control Gateway operates as a back-to-back SIP user agent, exerts third-party control to the Media Gateway, and receives CCXML-based call handling instructions from the Application Services Layer. Call, network and agent events are passed to the Application Services Layer as CCXML events.

The Application Services Layer delivers call center functions, including queuing, routing, quality monitoring and reporting. Real-time control of these services is enabled through a management portal within the data and user access layers. Role-based access is delivered through a Web-browser interface that is accessible from anywhere. Call and agent events are passed to the data and user access layers using Web services SOAP and XML.

Leveraging the data and user access layers, users can view and act on all real-time operations. In addition, users have access to real-time and historical reporting that is normalized across all sites, geographies, groups and call center technologies, including captive and outsourced agents. Third-party applications, including call center CTI, workforce management and business intelligence can be extended across multisourced call center operations through a standard information server and an open XML query generator.

The service can be used by a company such as Dell, for example, to use key performance indicators to compare the performance of various outsourcers to ensure that the desired metrics are being met. In addition, they would be able to see which outsourcer is most efficient and has the fastest call resolution times.

One of Transera's customers, Allegiant Air, was able to use the system to immediately spot that the abandon rate was high in one of their centers. This was attributed to long queues, and subsequently it became obvious that the center needed to shorten its wrap times. What is intriguing in this example is the person making the discovery was not a call center manager but Maurice Gallagher, the president and CEO of the company. The Web interface allowed Mr. Gallagher to easily see the status of the centers, and subsequently he discovered the need for change himself.

You may be wondering if I think Transera is yet another black moth. My answer is: not quite, but they are onto something big. There is a tremendous need to be able to interconnect the massive amounts of information in corporate databases and, moreover, connect disparate organizations in a more seamless fashion. The future of communications must involve more rapid dissemination of data and more effective use of technology to enable decision making.

These are some of the concepts being addressed by the Web 2.0 revolution. The next generation of online applications and services are destined to be more interconnected and seamless. Why should the call center be any different?

This is where Transera fits in. If the company helps corporations more easily share customer data and makes managing customers in disparate centers more effective, then perhaps the best description of the company's business is that they enable next-generation customer contact centers to flourish. Sure, this tagline isn't visually striking like black moth, but with all the talk these days about evolution versus intelligent design, perhaps this less controversial description will help us focus on what the company does. It helps you help your customers more effectively. **CIS**

## Definitions

**SIP or Session Initiation Protocol.** This is the most common VoIP signaling protocol and it allows the integration of presence and multimedia communications for seamless communications. Using a SIP address, you can terminate a VoIP call as easily as you send an e-mail or an instant message. The interest in SIP is growing so quickly that TMC has launched SIP Magazine (www.sipmag.com) this month, a publication focusing on educating buyers of SIP products and services.

**XML or Extensible Markup Language.** This is a general purpose language allowing data to be transported across applications and data systems. Special purpose markup languages are built on top of XML such as RSS, MathML and MusicXML. Many of the feeds that flow into TMC's online portal, TMCnet, are fed to us via XML.

**CCXML and VoiceXML.** The former is an XML-based language providing telephony-based call control for VoiceXML, a language allowing the building of voice-based applications with speech recognition and text-to-speech properties.

**SOAP** is a protocol for exchanging XML-based messages over a computer network, normally using HTTP. SOAP forms the foundation layer of the Web services stack, providing a basic messaging framework that more abstract layers can build on. SOAP facilitates the Service-Oriented Architectural pattern. There are several different types of messaging patterns in SOAP, the most common being the Remote Procedure Call (RPC) pattern, where one network node (the *client*) sends a request message to another node (the *server*), and the server immediately sends a response message to the client. **CIS**

# The Evolution Of Analytics And Call Recording

*The Boardroom Report provides the CRM, customer interaction and call center industry's view from the top, featuring the sector's first in-depth, exclusive CEO-to-CEO interviews with leading executives regarding industry news, analysis, trends and the latest developments at their companies. As the industry's leading publication since 1982, it is our responsibility to recognize leaders with the best minds in the industry and share their vision and wisdom with our valued readers. Technology Marketing Corp. founder/chairman/CEO Nadji Tehrani interviewed Verint Systems' President, CEO and Director Dan Bodner for this installment of The Boardroom Report. More information about Verint Systems may be found at http://www.verint.com.*

**NT: Please tell us about your company and type of business.**

DB: Verint Systems (news - alert) is the leading provider of analytic software-based solutions for the security and enterprise markets. Verint solutions help enterprises capture massive amounts of structured and unstructured information, such as voice, video and text, and distill this information into actionable intelligence — timely, mission-critical insights for more effective decisions and optimal outcomes.

What does actionable intelligence mean to Verint? Actionable intelligence is mission-critical information that you can readily understand and use to improve business performance — timely information that you can act upon for better business outcomes.

In the security market, intelligence and law enforcement organizations use Verint to analyze and distill the huge amounts of information available to them and generate actionable intelligence to better protect lives and assets.

Enterprises use Verint's ULTRA solution to analyze and distill the huge amounts of information generated within their contact centers. This capability improves agent performance, enhances contact center efficiency and filters back into the enterprise in the form of improved customer service, higher profit margins and the agility required to react to changing market conditions.

Actionable intelligence is an enterprise window to the customer experience. It impacts every process and person that touches your customers. For a contact center supervisor, actionable intelligence means the right contacts for evaluation delivered automatically to his desktop. For a customer retention specialist, actionable intelligence is an alert about a valued customer threatening to close his or her account received within minutes of the call. For a marketing executive, actionable intelligence is calls that indicate why a new product campaign is generating more questions than sales.

**NT: What are the greatest challenges that you and your company are facing?**

DB: The contact center solutions market is a key component in a very important transformation driving enterprises to become more customer-centric. Today, companies need to focus on the whole customer process, not just the contact center processes. It's about overall enterprise performance, not just agent optimization.

Verint's number one challenge is to educate the market about the great benefits of adopting a more holistic approach to enterprise quality. As leaders of this industry, our challenge is to communicate the message to as many people as possible, as fast as we possibly can.

Actionable intelligence is a great asset to forward-looking organizations. It's one of these disrupting technologies that helps improve the entire organization to perform at higher levels.

**NT: What do you feel are practical solutions to those challenges?**

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their idea

[ We didn't come up with the same conclusions. ]

our endless possibilities

INTERACTIVE INTELLIGENCE®
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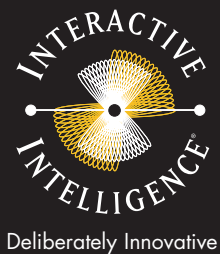
Struggling to make a "one-size-fits-all" solution work in your business? Communications solutions should create an environment where you can interact with your customers without feeling constrained by the "lines". **Complete yet flexible software solutions for the Contact Center and IP Telephony enterprise, backed by a decade of innovation and experience.**

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**DB:** While actionable intelligence can benefit many functional units within an organization, not every customer is ready for a full implementation. Therefore, we are taking a practical approach to deployment and have designed our ULTRA solution around modules that can provide incremental benefits to our customers.

For example, ULTRA can be implemented in the contact center to assist customers who are focused on agent performance only. Those customers may choose, at a later time, to look beyond the agent into contact center quality and enterprise quality issues. They can use ULTRA to optimize back-office business processes by understanding how and why they affect service delivery and customer satisfaction. In addition, the insights gained from ULTRA can ensure the consistent high quality of process-intensive customer-facing businesses.

**NT: In your opinion, what is the greatest need of our industry?**

**DB:** As mentioned before, the contact center solutions market is key to a very important transformation in the enterprise. It's about the whole customer process, not just the contact center; it's about enterprise performance, not just agent optimization. The industry needs products and services with much higher ROI than today's increasingly commoditized recording/QM solutions.

You can't achieve your customer service, operational performance and quality objectives without a holistic view that connects the contact center with all the back-office functions feeding into it.

**NT: Tell us about new developments in your company.**

**DB:** Our recent acquisition of The Opus Group extends the capabilities of Verint's Enterprise Actionable Intelligence portfolio to further support enterprise goals to enhance the effectiveness of their customer-facing and back-office operations. Opus helps process-intensive enterprises improve performance and reduce the cost of their operations by analyzing data collected from across the enterprise and identifying areas for improvement.

In short, Opus provides Verint with an expanded solution offering and a performance management analytics suite that complements ours, deep domain expertise, more than 500 man-years of experience in operational performance management, and a proven, high-ROI performance optimization methodology. These capabilities extend our reach in the enterprise to optimize the complete customer experience from front office to back office.

Verint also recently announced a new addition to the ULTRA solutions suite, called ULTRA Analytics. ULTRA Analytics goes beyond traditional performance management and workforce optimization tools to help businesses understand not only what is happening in their operations, but to also identify the underlying causes. ULTRA Analytics also helps resolve issues that impact the effectiveness of their customer-focused operations.

**NT: What would be the impact of those developments on the bottom line?**

**DB:** The acquisition extends the capabilities of Verint's Enterprise Actionable Intelligence portfolio to further support enterprise goals to enhance the effectiveness of their customer-facing and back-office operations.

**NT: How would you describe the current status of the customer interaction/CRM/teleservices industry?**

**DB:** This industry is at an interesting inflection point. As mentioned before, the enterprise quality trend is causing our customers to view their processes and programs differently and is requiring vendor partners to provide solutions that deliver significant business impact.

The transformation of the contact center and its meaningful connection to the rest of the enterprise requires new strategies, approaches and technologies. Verint is well positioned to help our enterprise customers navigate this transition.

**NT: What is your vision for the trends and the future of our industry?**

**DB:** Our vision is that contact centers will be called upon in the near future to have a greater impact on the overall business plan of enterprises and therefore will be more closely aligned with the business objectives. In order for success to be achieved in the contact center, I think the organization needs to realign performance with strategic business goals.

This can be facilitated by sharing the intelligence gleaned in the call center with other parts of the organization for a more complete view of the customer's interaction with a company. Solutions like our ULTRA root cause analytics will help our customers understand the drivers behind incoming calls to their call center and to better understand how they can improve products, programs and services both inside and outside the contact center.

**NT: What is the significance of the following in the customer interaction industry: VoIP, speech, data security, home agents and offshoring?**

**DB:** VoIP (define - news - alert) is about virtualizing the contact center and expanding its boundaries. Remote agents and home agents become feasible and possible with the advent of IP.

Speech technology is a transformative technology that can deliver real business impact. Turning customer interactions into actionable business intelligence delivers many important insights that enable real performance improvement.

As virtualization technologies like VoIP proliferate, data security will become more critical in the call center.

You will see a growth of call center data security initiatives similar to what organizations are currently deploying for back-office systems.

The concept of home agents enables organizations to cost-effectively expand their workforce to accommodate peak seasonal workloads and to have flexibility to attract new work populations beyond their geographic area. However, processes and best practices will need to be solidified to make this a viable option.

Finally, offshoring is a trend that we've seen slow down somewhat in the past year, but it still remains a growth factor for our business in India and other Asia locations.

**NT: Is your company involved in any of the above?**

**DB**: All of the above, except for data security.

**NT: What is your company's greatest core competency?**

**DB**: Our core competency is our focus on the actionable intelligence technology combined with vast experience in optimizing contact center and enterprise performance. Our core competency is our ability to provide customers with total solutions to their business problems. Technology alone will not do it. It's our people's expertise in applying this technology and replicating success from one customer to the next that differentiates us from the rest.

**NT: How do you differentiate your company?**

**DB**: Verint's solution for the contact center market, the ULTRA suite, provides actionable intelligence that helps customers enhance the overall effectiveness of customer-focused operations, with tangible business benefits for departments throughout the organization. Verint is the only one in the market to provide:

• Actionable intelligence for a smarter workforce — for managing the entire agent evaluation, coaching and development process;

• Actionable intelligence for a smarter contact center — to enable the organization to effectively measure and enhance contact center operations; and

• Actionable intelligence for a smarter enterprise —for sharing customer intelligence across the organization. **CIS**

# CEO Spotlight



Avi Margolin
CEO
Mercom

**This month, the CEO Spotlight speaks with Mercom's Avi Margolin. Mercom (news - alert) is a provider of interaction recording and performance evaluation solutions, scalable to meet the needs of very large to small organizations.**

**CIS: Traditionally, we know that financial services organizations have always required call recording functionality. As the world becomes more regulated, in light of legislation like Sarbanes-Oxley, are you seeing more industries buying and using call recording technologies?**

**AM:** Absolutely. Full-time call recording is becoming a staple component of a strong risk mitigation strategy in light of increasing business regulation. We've seen accelerated interest in compliance recording from non-traditional recording markets and a move toward more full-time recording and less quality-only recording across the traditional call center verticals.

**CIS: What do you think of the trend of call recording/quality monitoring companies merging with workforce management companies for what they're calling total "workforce optimization"? Is this a good thing?**

**AM:** This, just like any avenue which leads to additional information for call center management, is a compelling concept. It will certainly be interesting to see the market's response and the tested ROI of this approach as opposed to the traditional method of simply integrating quality data with a customer's existing key metrics, including their best-in-breed workforce management. Mercom is known for a focus on evergreen technologies and investment protection, so by our culture, our first approach is always to utilize the customer's current workforce management investment, but we'll certainly be watching this trend closely.

**CIS: How has IP telephony affected the quality monitoring industry? What sorts of capabilities are possible now that once weren't before its advent?**

**AM:** VoIP dramatically extends the "reach" of quality monitoring and recording systems. As physical location becomes irrelevant to telephony connection, quality monitoring and recording capabilities are extended across the virtual call center, opening up possibilities that did not exist a decade ago. Work-from-home agents can be recorded and monitored with the same ease as agents sitting 10 feet away, so at-home does not have to mean unsupervised. Mercom embraced VoIP early on, both for our own business and that of our customers. It's exciting to watch what our customers are able to do today and we are pleased to be an integral part of their IP success.

**CIS: Why do you think analytics are becoming so important to contact centers? What kinds of metrics are being vastly improved due to modern analytics solutions?**

**AM:** Call centers have long contained an overabundance of disconnected data. The ability to make sense of those data has been the challenge. Modern analytics solutions make the extraction of usable metrics out of mountains of data possible, so it's not at all surprising that they are becoming so important. Beyond individual metrics, the combination of data sources allows for improvements in areas such as call-handling efficiency (beyond a one-size-fits-all, shorter-is-always-better measurement) and agent effectiveness (both from a quality and productivity perspective). Mercom customers, for example, can now pinpoint which behaviors on their quality monitoring form statistically correlate to operational key performance indicators such as customer service index or sales revenue.

**CIS: What kinds of activities will we see in the future, near- and long-term, from Mercom?**

**AM:** Mercom has seen a trend in the use of customer-provided hardware platforms for our product offerings, and we are accommodating those customers who have expressed this need. We see this growing dramatically over time, making Mercom much less of a hardware provider and much more of a software company.

The centralized call center is fast becoming the global call center — often a call center without walls. Mercom has had great success in Japan by providing centralized recording for a customer with several hundred sites where all of the calls are stored, administered and archived in a central location even though they are recorded throughout the country. We see much more of this type of application in the near future.

With the needs of companies changing due to new regulations and the advances in computing power, we are starting to see a stronger need for speech recognition coinciding with the capability to provide it at a cost that offers a strong ROI. Mercom has been providing speech recognition capabilities for a select few customers for the past couple of years in partnership with the leading providers of this software. Now the costs are coming down due to the need for fewer servers, and the benefits are being recognized. We expect to see speech recognition and the subsequent data mining becoming a more significant part of our business.

The need to absolutely guarantee the authenticity of our recordings is another strong industry trend. Mercom is able to offer time-stamped and certified recordings that meet international standards for legal authenticity. This is a new trend in our industry and Mercom has solutions available that ensure that the calls we record have not been altered and are therefore admissible in any court of law globally.

**CIS: Thank you for your time.** CIS

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# 2006 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

**Amae Software**

**Aspect Software**

**Davacord** (formerly VoiceLogger)

**FrontRange Solutions**

**GN Netcom**

**IEX Corporation**

**Interactive Intelligence**

**Jacada**

**Left Bank Solutions**

**Mercom**

**NICE Systems**

**Nortel Networks**

**Sennheiser Electronic Corp.**

**SER Solutions Inc.**

**Siebel Systems**

**Spectrum Corporation**

**SIVOX**

**Stratasoft, Inc.**

**Strategic Contact Solutions, Inc.**

**Telephony@Work**

**Verint Systems**

**Witness Systems**

## Teleservices Outsourcing

West Corporation



InfoCision Management Corporation



Teleperformance-Mexico



Advanced Data-Comm, Inc.



## List and Sales Lead Databases

*info*USA



For information about how to get on the
Recommended Vendor list, see
www.tmcnet.com/mediakit/cis04/soa.htm

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

## Avanade Leverages Microsoft Dynamics CRM 3.0

**Avanade Inc.,** (news - alert) a technology integrator for **Microsoft** enterprise solutions, has announced the availability of its Enterprise CRM solutions for Health Plans, Financial Services and Customer Care, leveraging the Microsoft Dynamics CRM 3.0 product. Avanade has integrated the Microsoft Dynamics CRM 3.0 technology to allow it to tailor solutions to meet the specific demands of the customer's business, with the customer's existing application investments. The goal is a more cost-effective CRM solution that works the way employees expect it to, supports the way companies do business, and runs the way IT staff expects technology to run. Avanade's new health plan solution and the release of the financial services and customer care solutions on Microsoft Dynamics CRM 3.0 are aimed to capitalize on the enhanced product capabilities including marketing automation, reporting and analytics.

Avanade Enterprise CRM for Financial Services supports industry- and company-specific business processes, workflow, policies and security requirements, and provides a comprehensive view of high-value clients. Avanade pairs its expertise designing and integrating Microsoft systems for the enterprise with partner **GaleForce Solutions'** focus on the financial services industry, to deliver customer relationship management systems expressly for companies in the sector.
**www.avanade.com**

## SugarCRM Introduces Sugar Suite 4.0

Open-source CRM provider **SugarCRM Inc.** (news - alert) recently announced the beta release of its Sugar Suite Version 4.0. Sugar Suite 4.0 introduces new functionality such as advanced reporting and customizable dashboards, campaign management, workflow management and access control, e-mail processing and enhanced lead sharing. The company states that new functionality was added based on input by customers, and that its pace of innovation is driven by the SugarCRM community of 3,000 developers and 10,000 members, which provides product direction, testing, translations and modules to Sugar Suite. Sugar Suite 4.0 offers complete CRM functionality, flexible deployment options and an open architecture that allows companies to customize, deploy and integrate SugarCRM more efficiently than proprietary software vendors, according to the company.
**www.sugarcrm.com/crm/products/40-preview.html**

## Siebel And BEA Systems Announce Joint Solution

**Siebel Systems, Inc.** (quote - news - alert) and **BEA Systems, Inc.,** (news - alert) a provider of enterprise infrastructure software, recently announced the general availability of Siebel Component Assembly for J2EE-based BEA WebLogic Server 9.0. The combined offering is designed to help customers significantly simplify and speed the development of custom CRM applications, enhance organizational decision-making and increase end user productivity. The solution also represents a milestone in an ongoing partnership between BEA and Siebel Systems to deliver on a common vision for Service Oriented Architecture (SOA) via their respective Services Infrastructure and Customer Adaptive Solutions software. BEA's Services Infrastructure vision promotes the free flow of business processes, information and services to help organizations more rapidly compose, configure and reuse technology assets to more efficiently meet evolving business needs. Siebel Customer Adaptive Solutions deliver CRM applications that allow companies to understand and anticipate a customer's needs; rapidly design and implement customer-centric processes; continually realign those processes for systemic, consistent improvements; and direct the right actions across organizations to help maximize customer satisfaction and profitability.
**www.siebel.com/component-assembly/software-solutions.shtm**

### Sigma Dynamics Announces New Applications

**Sigma Dynamics** (news - alert) has announced four new applications designed to bridge the operational and analytical worlds of CRM: Strategic Routing Analytics, Predictive Cross-Sell, Real-Time Customer Satisfaction and Six Sigma Customer Process Management.

Based on Sigma Dynamics' real-time predictive analytics platform, the new applications combine customer insights with business logic to help make the best decisions for every customer across any channel. The goal is to create a more immediate, effective way for businesses to achieve customer satisfaction, improve customer retention and drive revenue growth. Unlike traditional analytics-only offerings that simply provide customer insight, the Sigma Intelligence Platform delivers this information to automatically adapt processes to customer needs inside the context of each interaction. The Platform measures each customer interaction to identify important trends early on in the interaction, and self-adjusts to make recommendations that drive business goals, such as increasing revenue or improving customer satisfaction and retention targets. Built on a pure J2EE Services-Oriented Architecture, the new application templates can accelerate implementations, ensure best practices and integrate with existing applications, processes and databases.
**www.sigmadynamics.com**
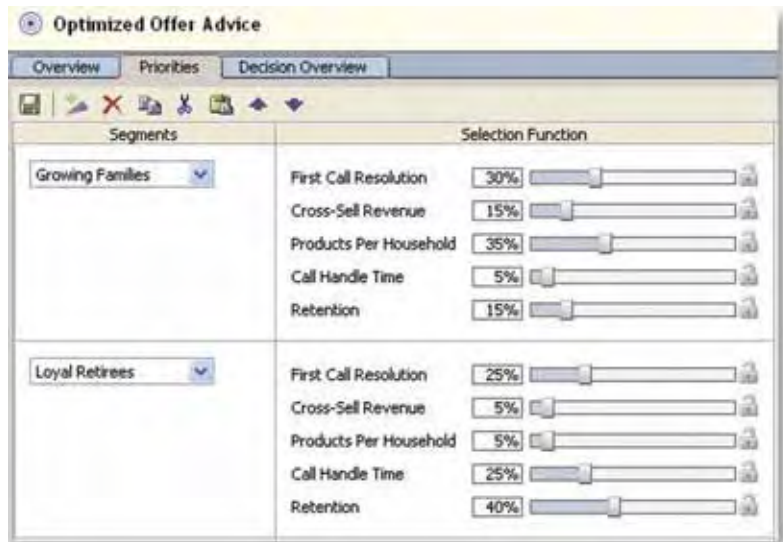
## PAR3 Acquires EnvoyWorldWide

**PAR3 Communications, Inc.**, (news - alert) a provider of enterprise customer communication solutions, announced recently its acquisition of **EnvoyWorldWide**, (news - alert) a provider of high-availability notification services for business continuity and emergency communications. The union of the two companies was forged to create a single source for notification solutions that meet the growing needs of the enterprise, from collections and customer service to the communication of unplanned events that threaten the continuity of business operations. Terms of the agreement were not disclosed.

The newly combined entity with 200 employees and offices in Bedford, MA and Seattle, WA boasts customers such as Bear Stearns, Duane Reade, Medco, Nextel Partners, Progressive Insurance, Symantec, Strohl Systems and US Airways.
**www.par3.com, www.envoyworldwide.com**

## Alliance Systems Selects Smart Catalog

**Alliance Systems, Ltd.**, (news - alert) a provider of communications and computing infrastructure solutions, and **Endeavor Commerce**, the developer of Smart Catalog, recently announced Alliance Systems' selection of Smart Catalog. Smart Catalog is a tool that ensures accurate quotes, which translate into more error-free orders, improved revenue and increased customer satisfaction. Alliance Systems has committed to the **Microsoft** (quote - news - alert) Dynamics platform for both their front-office CRM needs and back-office business management application with Microsoft Dynamics CRM and Microsoft Dynamics Great Plains, respectively. Smart Catalog features integration with Microsoft CRM to add guided selling, product and pricing configuration, quote and proposal delivery, order entry and e-commerce features.
**www.smartcatalog.com**

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Whenever possible, please include high-resolution (minimum 300 dpi) color graphics (.BMP, .EPS, .TIF, or .JPG).

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## IEX Introduces TotalView InSight Performance Manager

**IEX Corporation**, (news - alert) a **Tekelec** company, recently introduced the TotalView InSight Performance Manager. Advanced features were designed to improve performance by providing contact centers with a unified view of operational metrics, helping everyone gain a clear understanding of performance goals and results. Using InSight, agents can more easily see how they are performing to operational objectives such as average handle time and adherence goals. Executives receive benefits from information supplied by InSight dashboards. They can quickly see what is happening across a broad range of key performance indicators to identify and resolve problems before they escalate. Supervisors can also use InSight to improve mentoring and agent recognition while workforce planners benefit from the root-cause analysis capabilities it supplies through full-featured online analytical processing (OLAP) reporting.

InSight is an advanced feature of the IEX TotalView Workforce Management system, providing a performance management solution that can be deployed quickly. A predefined set of KPIs is supplied along with standard dashboards and reports for agents, supervisors and executives. Additionally, up to six predefined metrics can be imported from another contact center system such as quality monitoring, e-learning, human resources or other solutions. The center also has the ability to customize the predefined dashboards and reports and can add more without requiring professional services or vendor programming.

As a TotalView advanced feature, InSight comes with built-in support for multisite management. This allows the center to view information and perform analysis at any level, from the entire operation to individual sites, contact types and queues. With a thin-client Web interface, the InSight solution is quick to deploy and easy to maintain.

In other news, contact center and performance management solutions provider **Merced Systems** (news - alert) recently revealed that TotalView InSight Performance Manager is built on Merced Systems technology.

**www.iex.com, www.mercedsystems.com**

## OutStart In Learning Management Systems Magic Quadrant

**OutStart**, (news - alert) a provider of software solutions for learning and knowledge-sharing, has announced it has been positioned by **Gartner, Inc.** in the visionary quadrant in the "Magic Quadrant for Learning Management Systems report". According to the report, "visionaries" are vendors that have a strong market understanding and ability to anticipate shifting market drivers. Each year, Gartner evaluates the LMS market and includes the top vendors in its LMS Magic Quadrant. To quality for consideration, vendors must develop their own LMS products and services, be in the space through a public go-to-market strategy, have at least $5 million in LMS software license and related service revenues and be regularly referenced by Gartner prospects or clients as a focused player in the market.
www.outstart.com

## Study Shows Americans Are Most Impatient Customers

Preliminary research from **Dimension Data's** (news - alert) annual worldwide contact center survey shows that Americans are impatient when waiting in queue and are quicker to abandon calls than consumers throughout the rest of world. More than 360 contact centers worldwide were surveyed over the past nine months, reporting that callers in North America were more likely to abandon calls more quickly than their counterparts throughout the world. Contact centers in North America report that Americans are impatient — willing to wait an average of only 37 seconds for their calls to be answered. The rest of the world exhibits greater patience — consumers in Europe, the Middle East and Africa are willing to wait 67 seconds before abandoning a call. People in Asia-Pacific are the most patient at 72 seconds.
www.dimensiondata.com

## Acxiom Hires Privacy Officer

As part of its continuing efforts at protecting data privacy and security, **Acxiom Corporation** (news - alert) has made several significant leadership appointments, with Chief Privacy Officer **Jennifer Barrett** being named Global Privacy Officer. Other privacy leadership appointments include that of **Sheila Colclasure**, Acxiom business leader for privacy practices and solutions, who will assume the role of privacy officer for North and South America; **Barbara Sullivan**, Acxiom privacy leader for Australia and New Zealand, who has been named chief privacy officer for Asia; and Acxiom consultant **Sachiko Scheuing**, who will be privacy leader for Europe. Acxiom provides privacy consulting to some of the largest organizations in the world to help them with compliance strategies and to guide them in establishing best practices in privacy and security.
www.acxiom.com

## e-Glue Business Technologies Announces e-Glue Direct For Quality

**e-Glue Business Technologies**, (news - alert) a provider of real-time adaptive solutions for customer interaction, has announced the release of e-Glue Direct for Quality, a new solution designed to deliver improvements in the quality of customer service by providing agents with active, relevant support during live interactions with customers. e-Glue's approach leverages agent quality scores from quality monitoring systems and real-time information from the call to decide the type of support an agent needs. Direct for Quality's real-time reminders appear at the right time in the call to deliver relevant information that's tailored to the needs of each agent. For example, agents who forget to update customer contact information will receive a real-time reminder whenever caller information is missing. e-Glue helps close the natural variation gap among agents; as agents master particular quality areas, their quality scores improve and they no longer receive prompts for those areas.
**www.e-glue.com**

## Nuasis Launches IP Migration Incentive Plan

**Nuasis** (news - alert) has revealed that it will migrate call centers currently using outdated Aspect, Nortel, Avaya or Cisco ACD systems and apply $1,000 per agent license to the purchase of a Nuasis NuContact Center. For companies that require a multiple site migration to IP, the software-only, IP-based architecture of the Nuasis system integrates with legacy ACD equipment and other call center infrastructure. In addition, Nuasis will integrate the IP-based NuContact Center with any CRM database that is currently integrated with the legacy ACD switch at no cost.

In addition to "future proofing" their infrastructure, Nuasis customers who have replaced outdated ACD systems with the IP-based Nuasis NuContact Center can gain significant business benefits. Nuasis has indicated that customers are reporting productivity gains, improved ease-of-operation management and significant cost reductions. The switch-independent, standards-based, software-only system supports single call centers and enables multiple contact center sites to be managed as a single center. The built-in CTI capability and simple workflow tool allow the integration of CRM applications, homegrown and hosted services, workforce management applications and quality monitoring applications to be done in a matter of days versus weeks to months. The company states that this capability has also resulted in quick and easy deployments of CRM-enabled screen pops that do not require costly professional services.
**www.nuasis.com**

## New EasyRun Release Unveils Universal Queuing

**Easyrun**, (news - alert) a provider of contact center solutions and CTI integration, recently announced a new Universal Queuing feature as part of its new EPICCenter release, in addition to other enhancements at every level and in every aspect of the solution. The enhancements were added to increase the productivity of call center workers and improve their customer service levels.

Universal Queuing is now fully available with EPICCenter. With the release of V4.6 and the improved EPICEmail components, call center managers can more easily prioritize customers and incoming connections regardless of the media used for the contact. The same set of business and routing rules can be applied to voice calls, chat calls and e-mails. Designed in open architecture, EPICCenter was created to offer smooth and quick integration with any e-mail server supporting the standard protocols of POP3 and SMTP and requires minimal changes to the business IT environment. Completing the Universal Queuing, the new EPICCenter release introduces enhanced reporting capabilities and real-time presentations. These new enhancements were added to help enable managers and supervisors to differentiate between, and to accurately quantify, the voice, chat and e-mail activities from every perspective.
**www.easyrun.com**
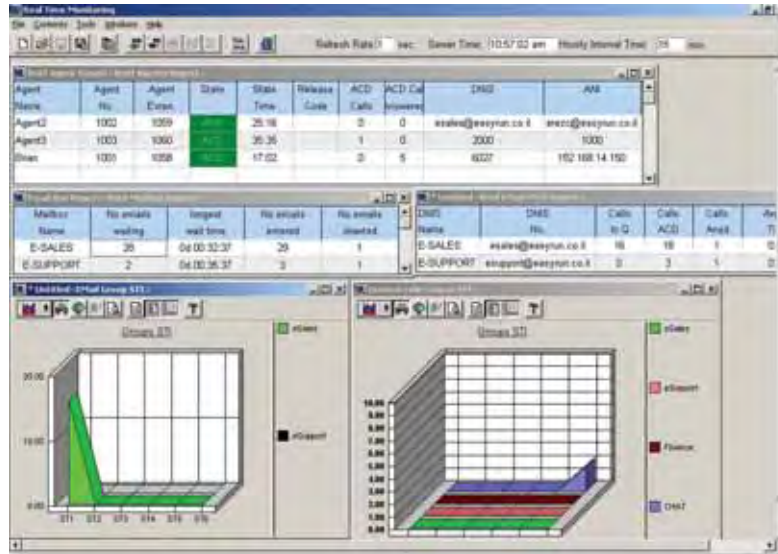
## Data Collection Resources Upgrades CEMS

**Data Collection Resources**, (news - alert) a provider of affordable quality monitoring, call center recording and e-learning management solutions for call centers in North America, has announced the general availability of its CEMS Release 5.2. CEMS 5.2 offers new features designed to make managing and reporting agent performance less complex and more robust. New features include easier management of pre-recorded events, additional agent management protocol, added real-time capabilities and the addition of new management report templates to the CEMS' management reports library. DCR offers mid-market solutions designed to provide customers with affordable, flexible and reliable alternatives to enhance and improve the customer's experience without the high cost of owning a legacy quality monitoring and call center recording system. CEMS is DCR's core offering for organizations requiring a complete quality monitoring and call center recording solution that is collectively more affordable and budget-friendly. CEMS can be cost-effectively configured and implemented for total recording, random recording, record on demand, customized agent evaluation, real-time monitors for agent screens, synchronized audio video, e-learning management and management analysis and reporting.
**www.monitoringmadeeasy.com**

**Go To Table of Contents | Go To Ad Index**
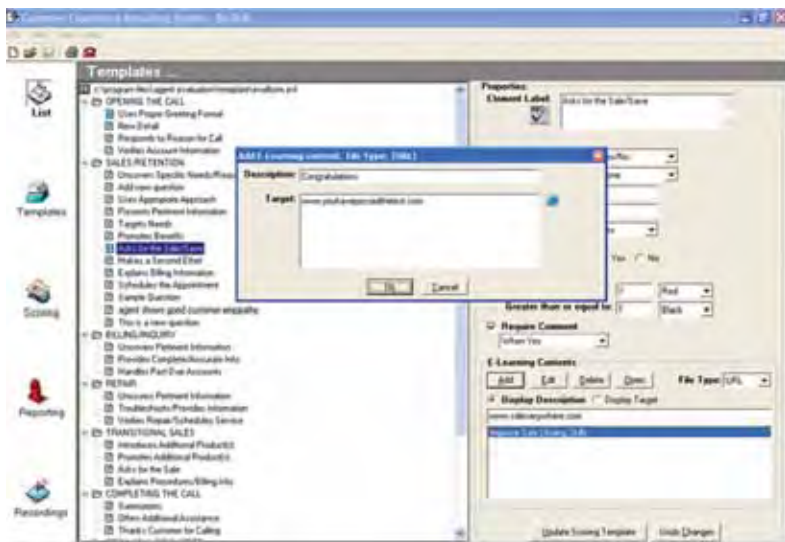
## Avidian Technologies Announces Prophet 3.0

**Avidian Technologies** (news - alert) recently announced the launch of Prophet 3.0, the newest version of its Outlook-based sales software solution. Avidian also announced that Prophet will be available for the first time for enterprises with Prophet Enterprise Client and Prophet Enterprise Server. Prophet 3.0 includes the following new features: tighter and more seamless integration inside Outlook to provide a faster load time and allow users to manage sales information from their Outlook Inbox or Contacts; Sales Assistant to allow users to send pre-set, timed e-mails to their contacts; Workflow Engine to allow users to customize automatic sales cycle actions and create consistent sales processes to make sure critical tasks get accomplished for every prospect or sale; and Groups and Permissions' features to support unlimited hierarchical sales structures so that the right people see the right information. Other features new to Prophet 3.0 include increased customization, advanced reporting options and additional Opportunity Manager and Contact Manager features.
**www.avidian.com**
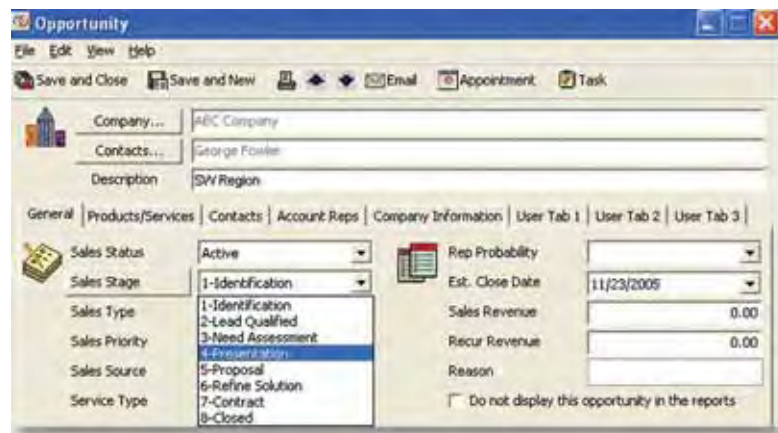


## inQ's Live Chat Turns Online Visitors Into Qualified Sales Leads

**inQ**, (news - alert) an online marketing company utilizing live chat to put salespeople on the Web, has announced the addition of leadQ to their live chat marketing solutions for businesses. leadQ is a lead generation solution that can be used to qualify site visitors and capture personal information for immediate or future contact. leadQ is typically deployed on b-to-b or high ticket consumer product Web sites (such as automotive, financial services, real estate) in verticals where products are primarily sold by phone, or face-to-face by a broker or sales representative. The leadQ Live Agent engages online visitors in a live chat dialog, qualifies their purchase intent and the revenue potential they represent, and arranges a phone appointment with a sales representative.

A "click2chat" box is built into the page, or a live chat is automatically initiated based on onsite behavior such as the amount of time a customer spends on the Web site, on a particular product page, or the number of visits to the site. When a chat is launched, the live agent will introduce himself or herself as a customer service agent from the site and may ask a few questions to better understand the customer and his needs. The agent will then explain the value of talking directly to a sales representative and will collect a name, phone number and a call-back time through the chat dialog. The lead is immediately transferred to the client's sales team and a hot transfer from the chat to a sales representative on the phone can be arranged. leadQ can also be implemented as a customer begins the "contact us" form-fill process, a standard procedure for many online businesses that are selling their products or services through a direct sales model. Here leadQ can increase the accuracy of the data collected as well as the form completion rate.
**www.inq.com**
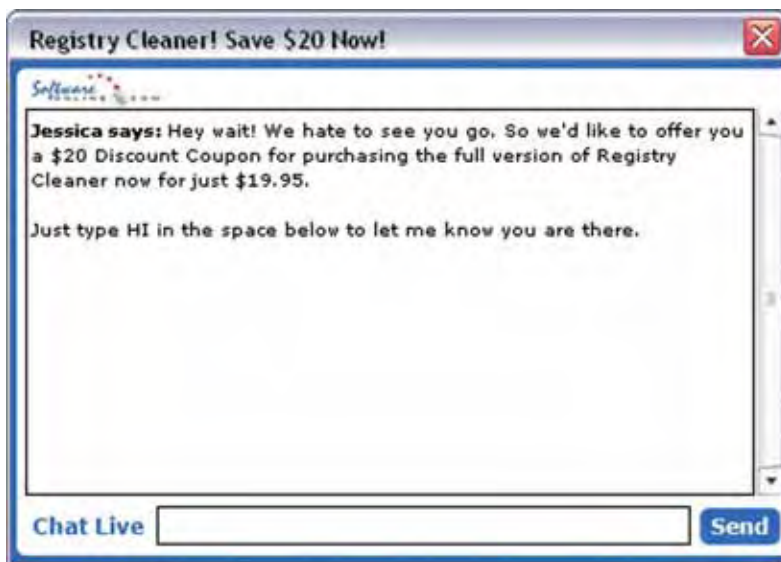
# IP Contact Center Technology: Eliminating The Risks (Part XI)

## Achieving Multisite Efficiencies

IP contact center technology provides multisite organizations with the opportunity to gain economies of scale in their technology investments by replacing dedicated site-specific systems at different locations with solutions that can be shared across all locations. These economies of scale are driven by:

- The elimination of dedicated technology license pools (for both individual sites and for individual communications technologies);
- Greatly reduced hardware requirements (by sharing resources across locations);
- The aggregation of telecom resources; and
- Dramatic reductions in IT management costs resulting from the consolidation of technology resources.

In a solution designed to support diverse sites, the solution's application logic and supporting software (Web servers, mail servers, application servers, etc.) can reside in one or more data centers. Sophisticated multisite solutions can also remotely control geographically distributed IP voice gateways at an unlimited number of locations.

With nearly all voice-over-IP solutions, individual sites can receive pure IP-based traffic without installing any local phone lines at individual locations. However, there are often compelling reasons for companies to deploy local telephone lines at different locations as entry points or exit points for the corporate voice network. With better voice-over-IP solutions, centralized application logic can actually control IP voice gateways around the world, enabling application logic to span across sites. This dramatically reduces IT costs (and the skills required) to support individual locations. In this model, phone lines are distributed across individual locations around the world yet remain under the control of centralized application logic. The benefit is that application server(s), database(s), Web server(s) and related infrastructure can be aggregated in one or more data centers to drive economies of scale.

### The "Multitenant" Value Add

Multitenant IP contact center solutions extend these benefits for organizations with autonomous business units — where each requires their customized technology-driven business rules. The core benefit of the multitenant approach is that autonomous business units can be treated as separate "tenants" on shared infrastructure while protecting the data privacy of each individual business unit.

In previous columns, we've examined the issues of scalability, reliability and network security in a multisite context as well as how to assess a proposed solution's software architecture to ensure that these requirements will be met. (Feel free to e-mail us for soft copies.)

Companies with business units in different time zones should be sure to select solutions that offer time-zone sensitivity. Different business units operating in different time zones will each require their own real-time and historical reports to be presented in the context of their own time zones. (The same is true of date formats and monetary formats.)

Another key differentiator between multitenant solutions lies in the ability (or lack of ability) to provide local managers with comprehensive control over their own technology-driven business practices.

### Why Local Control Matters

Since individual business unit managers are responsible for their own business results and are closest to the customers they serve, they will understandably prefer to maintain control over their own infrastructures to ensure responsiveness to the needs of their specific business unit. Most business unit managers will therefore be reluctant to rely on remote IT organizations to service their operations. Multitenant solutions that deliver fully segmented control over technology-driven business processes provide companies with the best of both worlds: the economies of scale resulting from shared systems without sacrificing the autonomy of individual business units.

The best solutions also provide business unit managers with real-time control over their own technology-driven business processes, providing them with the ability to adapt to changing business conditions in real-time. This can provide them with even greater control over their own "virtual" infrastructures than what they could expect from traditional, dedicated premise-based solutions.

Since the root of the value proposition lies in reducing costs by sharing common infrastructure across locations, the rest of this month's column will understandably focus specifically on multitenancy and the radically different architectural approaches that different vendors have taken to provide multitenant capabilities; and how these differences can impact on the success or failure of corporate objectives.

### True Multitenancy Versus Primitive Partitioning

There are two types of multitenant solutions. Both offer data segmentation. First, there is the class of primitive solutions

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where a single process (i.e., an ACD or routing function) is shared by all of the tenant companies (also called "in-tenant partitioning"). Second, there is "true" multitenancy where each tenant has dedicated application executables that are not shared — but those executables nevertheless rely on a shared hardware infrastructure, shared phone lines and shared software licenses. This latter approach offers compelling advantages:

• Dedicated resources are tenant-specific. This prevents other business units from disrupting the operations of other tenants.

• Tenant application software is segmented to eliminate the problem of "spaghetti code." In addition, ongoing systems integration (to accommodate the needs of each business unit) and all customization can be isolated. This means more reliability and predictability in operations. The key point is that you can accommodate the needs of an unlimited number of "tenants" without the risk of introducing instability for everyone.

• Control can be given to local business unit managers over their own "virtual" infrastructures without risking data security or stability for other tenants. This addresses the "too many cooks spoil the broth" problem that occurs when too many people are working on a single executable.

• Mirrored, hot back-up of individual dedicated resources on a tenant-by-tenant basis is also possible with solutions that offer software process segmentation. This is because they are designed as "network-based" executables that can run multiple instances in parallel across multiple servers. This means higher service levels for mission-critical applications

Solutions that segment technology configuration information *without* software process segmentation (i.e., within a single executable or shared set of executables) offer a more primitive partitioning scheme. This approach is called "in-tenant partitioning" but it is often passed off as multitenant technology by providers who cannot segment software processes. You should be aware of the differences and how true multitenancy has a positive impact on efficiency, system stability and cost of ownership. When vendors talk about multitenancy, the litmus test for whether they're really referring to "in-tenant partitioning" is whether each tenant has its own set of software processes that run on common servers and leverage common gateways, licenses and phone lines. If there is only one ACD software executable (or one e-mail management or chat software executable, etc.), you're looking at a solution that offers in-tenant partitioning, not true multitenancy.

## The Proper Role Of Partitioning

While primitive in-tenant partitioning is not a viable substitute for true multitenancy, there are circumstances where it can also add value to an individual business unit's corporate objectives.

In-tenant partitioning can be appropriate where segmentation offers a benefit within a business unit, as when a shared pool of agents must work on fully segmented campaigns. This is common in an outsourcer scenario where agents will work one call on behalf of a first client and the next call on behalf

of another. Many companies, even single-site organizations, can benefit from software separation across campaigns. For example, a company might want separate points of control for managers handling order fulfillment, customer service and internal benefits projects.

With well-designed "in-tenant" partitioning, business units can:
• Leverage a common pool of agents (and their pre-defined profiles);
• Leverage content libraries across segmented system partitions;
• Fully segment private data between outsourcer clients (who may be their competitors!);
• Generate reports that aggregate data across partitions for strategic analysis; and
• Provide management personnel with a real-time view of organizational performance across business unit partitions.

These benefits have special value to outsourcers because they need to measure performance relative to each corporate client as well as on an overall basis for themselves.

In the best of all worlds, your multitenant solution should offer *both* in-tenant partitioning and multitenancy; i.e., in-tenant partitioning capabilities within each provisioned tenant. This approach recognizes the efficiency of leveraging different tools to achieve different objectives, with no sacrifices.

## The Importance Of Due Diligence

There are diverse definitions of multitenancy. Undertaking due diligence of any multitenant solution's software architecture is important because even the most architecturally unsound approaches can often survive cursory lab analysis — because lab demonstrations typically don't test against actual business case requirements at scale. Lab trials also don't typically test against a realistic number of tenants, agents, workgroups, tenant-specific integrations, overall load stress, and the realistic pace of ongoing demands for changes to technology-driven business processes by individual tenants. Simply put, they generally don't accurately represent the complexity of real-world needs at scale and changing business unit demands. As a result, low-scale lab trials can result in the approval of multitenant solutions that can become completely ineffective when run in a large-scale environment or across diverse business units. Understanding the software architecture of a proposed multitenant solution can reveal logical "holes in the story" that lab trials can often miss. Once such an understanding has been achieved, the up-front application of common sense can save your company a tremendous amount of time, money and institutional pain.

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# Is On-Demand CRM Right For Your Customer Service Organization?

Outsourcing all aspects of a customer service operation continues to be a growing trend. More than 15 percent of all service centers are outsourced today, up from 10 percent just a few years ago. It seems that every aspect of the operation is considered for outsourcing: the people, the telephony infrastructure, the management. Even alternative strategies are being considered such as the use of home agents. But what about the service and support applications themselves? Can a high-quality service and support operation be run on an on-demand application?

It is widely recognized that integrating customer data with call center technology brings significant improvement to service and support efforts, and over the years many service bureaus and outsourcers developed home-grown CRM systems. However, this created a challenge for companies in terms of ownership and access to data since the information resided with the hosted contact center vendor. In the early 1990s, carriers and managed service providers began providing network services that eased the flow of information between applications at the company and its contact centers, but companies still grappled with expensive and time-consuming CRM deployments as well as making those investments work with their contact centers.

Like the changes that hosted contact centers brought, the advent of on-demand CRM is now transforming the way companies manage service and support. On-demand CRM solutions — those that require no premise-based implementation — eliminate the tremendous up-front software and hardware costs as well as the time required to get the system up and running. On-demand CRM brings together the agents, network and application so companies have control of critical customer data and can provide easy data access to multiple contact centers, no matter where they are located or what call center technology is in place.

Also, like hosted contact centers, all on-demand CRM solutions are not created equal. Companies looking to use an on-demand CRM solution should consider the following requirements:

**By Bonnie Crater**
Salesforce.com

***Access and user interface***. Does the system provide a browser-based, high-speed interface? Having a universal interface that can be accessed globally helps ensure consistent quality of service and also greatly simplifies training. A single, easy-to-use interface means agents in Nebraska, India and Australia all have the same data at their fingertips so customers don't get incomplete or incorrect information if they call outside of standard business hours.

***Integration***. Does the system support easy integration with other applications and provide a comprehensive view across multiple functional departments, such as sales, marketing, service, finance, logistics (order management, inventory management, etc.)? Users of an on-demand application should get a

complete view of customer interaction history, regardless of the source. On-demand CRM systems should allow for "one-click" integration with third-party applications, providing an unprecedented level of service that equates to greater loyalty and less churn.

*Data model and security model*. Is the system designed to support a single data model? Consistent data structures ensure an easy flow of data from Web forms as well as agent data entry, and support development of leads and customers at any stage. Also consider the security model, as it is important to provide data visibility to global teams and outsourcers without having to put the physical data and/or application on their premises. The solution should be capable of handling multiple roles with

specific privileges and profiles to ensure that information is available to the right set of resources.

*Customization*. Can the system be quickly and easily modified to support specific business workflows? Priority customers, special promotions and product changes are just a few of the many business drivers that require changes to routing and queuing strategies, service escalations and notifications. Managing changes in workforce availability adds another layer of complexity that demands quick and easy responsiveness and a system that supports the process rather than hinders it. On-demand CRM systems that can be instantly modified to meet changing business demands offer the greatest return on investment.

*Reporting*. Is consolidated global reporting a standard feature with the on-demand CRM system? Monitoring global agents for quality and performance is critical to maintaining consistent service levels. In addition to time-to-response and first contact resolution rates, the system should support customer feedback surveys and provide real-time dashboards as well as historical reports.

On-demand CRM solutions provide an opportunity to optimize service from both company-owned and hosted contact centers. Early adopters of on-demand CRM are seeing tremendous benefits from personalizing service with targeted upselling and cross-selling efforts. Not only do these efforts result in increased revenue opportunities, but customers feel their needs are recognized

**Requirements for On-Demand CRM**

Figure 1

and their business is valued.

The application of on-demand CRM is not limited to only service and support; many companies are now using the system to support marketing and sales efforts as well (see Figure 1). The single data model mentioned earlier is ideal for enterprisewide, end-to-end customer lifecycle management. From lead-generation to the customer's buying decision to service and support and ongoing upselling efforts, an on-demand CRM system that supports the 360-degree customer view delivers better service and more profitable customers.

Another less obvious benefit of on-demand CRM is its ability to leverage multiple service bureaus and outsourced contact centers without a significant investment. Because on-demand CRM supports complete access from any location without premise-based software, it's simple to dismantle contact centers that are under-performing and work with new centers that will meet desired service levels. Without the heavy investment, companies are not at the mercy of a sole contact center supplier and can better negotiate service costs.

On-demand CRM for the contact center costs less than buying software, is faster to deploy, and provides complete data access around the globe. In addition, on-demand CRM enables companies to maximize their relationships with service bureaus and outsourcers to reduce costs and ensure consistent, high-quality service. For companies looking to gain competitive advantage through superior service and increase profitability of customers, on-demand CRM should be evaluated for its innate ability to deliver bottom-line benefits that cannot be matched by software implementations, and improves both company-owned and outsourced contact center service quality. **CIS**

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# Agent Self-Service:
# Take Control Of Your Destiny

It's not enough to simply say that a company can attract employees by providing them with the tools they need to do their jobs. Increasingly, employees expect to be given the tools they need to manage their careers as well, using the transparency, ease of use and speed of response enabled by the always-on nature of the Web. A self-service approach to contact center workforce management can pay significant dividends in short order, and provide a key differentiator for a workplace in a competitive market.

While sophisticated workforce management can sometimes be misconstrued as disruptive and life-controlling, self-service diffuses those problems by putting agents in control of their own destiny, so to speak.

After all, agents want to be part of the management process — particularly as it relates to their own careers. Therefore, agent self-service should not be viewed or deployed as a way to put a wall between agents and the rest of the organization. Rather, it should be seen as a key opportunity to open up more lines of communication and render transparent more of the company's human resources, scheduling and operational practices, procedures and goals.

### Self-Service: A Solution To Business Problems

This is not merely a matter of feeling good about the working environment the organization creates for front-line agents. When agents have control over their employment situation, they are happier, and customers notice the difference. Gartner principal analyst Jim Davies concludes in the 2005 report, *Agent Esteem and Self-Actualization Are Key to Customer Satisfaction* that a one percent boost in agent job satisfaction leads directly to a customer satisfaction increase of over half a percent point. That's a solid return that can also bring better efficiency to the organization.

There is simply no contest. Supervisors and team leaders are most valuable to the operation when they provide the just-in-time intervention, short-term guidance and long-term coaching that all agents need. Determining break schedules and optimizing paid time-off requests, on the other hand, are inherently low-value activities for the management team. Fortunately, these rote tasks can be automated, cutting a great deal of uncertainty and presumed bias out of the process.

When agents have primary responsibility for entering the data and work preferences used to produce their schedules — and better yet, when they see instant feedback provided in a clear, neutral fashion — everybody wins. Agents see that their requests and scheduling priorities are being handled according to a set of established, impartial rules. And they are able to get the schedules they want without believing that change requests are regarded as an inconvenience or special favor by the management.

**By Rick Seeley**
IEX Corp.

Self-service tools in the contact center are not, as some supervisors fear, productivity-killing toys that produce nothing but additional conflicts.

The fact is that the manual, closed-curtain practices that have governed many contact center operations for so long create an unhealthy paranoia and distrust. Given no insight and little influence into processes such as scheduling and advancement recognition, some agents will come to believe that scheduling is a hidden, manual process that is out to "get" them. Self-service quells those doubts because information is provided openly and typically, responses for tactical issues, such as accepting or rejecting a day-off request, can be generated almost instantaneously.

Meanwhile, management is freed from poring over scheduling requests and is protected from fairness disputes. Additionally, agents can be confident that all requests have been handled fairly and objectively. This is a good thing, considering that the typical holiday time-off request in a manually managed organization looks something like this:

• Multiple agents send an e-mail to the supervisor requesting the same day off.

• The supervisor, inundated with such requests, sends all of these requests to a vacation planner or scheduling specialist.

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• The specialist reports back to the supervisor how many applications can be accepted and how many must be rejected to maintain staffing requirements.

• The supervisor decides whose applications to take, or goes back to the employees and requests that a certain number of employees retract their requests — perhaps by offering an incentive.

Clearly, throughout this process, too much time has been spent focusing on scheduling, and not enough time on improving the core business of the contact center. With self-service, even organizations with dedicated workforce management specialists benefit. When the workforce is managed in a self-service fashion using agent input and automation, resource managers are free to spend more of their time analyzing schedule adherence and shrinkage as well as developing overall policy recommendations and strategy implementations.

Agents working in a self-service environment come to feel they are self-man-aging — which gives them a sense of empowerment. When they have the capability to look at their own performance statistics and evaluate their activities against the goals of the organization, a number of them will have the self-discipline to recognize when they are behind and take steps to improve.

The conventional alternative involves supervisor browbeating days or even weeks after the fact, because in most contact centers that don't have self-service capabilities, managers typically get large packages of statistical data on their agents on an irregular schedule. They must then analyze the data and decide which agents to bring in for coaching.

The same systems and procedures that enable agent self-service create greater management productivity and timely intervention. Self-service and the timely delivery of analysis take administrative repetition out of the equation while giving supervisors the opportunity to take action when their agents need it most, whether for corrections or congratulations.

## Making Self-Service Work

The self-service, self-directed contact center workforce can and must start with preliminary agent training. As a key component of introducing this new working environment to agents, one or more members of the workforce training team should instruct new hires on the use of the self-service tools the organization provides to all its members, along with basic orientation on the "rules of engagement" for requesting and checking schedule alterations.

This is the first and ultimately best opportunity to deflect any organizational concerns that self-service tools will be over-used or used at inappropriate times. For instance, agents who are spending time looking for someone with whom to trade schedules can easily become a source of distraction and counter-productivity. Trainers can put

the use of self-service tools directly in context with schedule adherence and company etiquette, explaining how and when the tools can be used most effectively. They can also show agents how to propose changes or exchanges with co-workers in a way that minimizes distraction and maximizes chances for success.

Whatever the approach, agents should be aware of the role statistics play in the organization, and that they are not something to be used against employees. Employees should understand that the scheduling statistics are available on-demand for agents to examine and analyze.

This approach delivers vital information to agents about exactly how their job performance will be evaluated, and gives them the opportunity to initiate their own changes in working behavior if their performance is clearly not meeting expectations. Organizations that do not use conventional desktop computers or do not open their intranet to agent desktops can set up functional kiosks around work and break spaces for agents to use throughout the work week while off the queue to update their schedules and evaluate their performance.

### Self-Service: A Confidence Builder

Self-service engenders confidence. Given the right tools and insights, agents can quickly view and understand their responsibilities, and at the same time get the message that the company is fairly, accurately and consistently dealing with its employees on crucial issues such as scheduling and performance recognition.

In an organization of any appreciable size, the benefits of this transparency cannot be overestimated. If agents see themselves as virtually indistinguishable cogs in a large machine, they may have little reason to believe their individual needs are being heard and understood by management. Management becomes a dark and mysterious void to employees, one which hands out the schedule every week or two and does little else to interest the employees. In this situation,

it is too easy to believe that one's requests aren't being taken seriously, evaluated fairly or even viewed at all.

The instant feedback and traceable, rules-driven results that come with agent self-service systems alleviate that anxiety and make scheduling exactly what it should be — business, not personal. Self-service also leads to better and more needs-based deployment of training. Employees can be presented with a clear, concrete evaluation of their skills and performance. They also have an opportunity to schedule training or even launch e-learning sessions directly from their desktops, depending on how training is deployed to the workforce.

Managers can also "help themselves" to detailed reporting on each agent, breaking down performance either by the day, hour or even by the type of call handled, depending on the level of detail recorded and shared between the automated call distribution (ACD) system and the self-service application.

This allows managers to build a key understanding of agents without having to call lengthy all-hands or one-on-one meetings simply to discuss small trends in work results. Most importantly to managers in their supervisory role, the presentation of statistics and reporting for agents can be "pushed" as well as "pulled." Self-service systems can provide alerts to agents when their performance is out of certain boundaries that have been defined by the organization.

This takes the pressure off coaches and supervisors to be the face of bad tidings, and instead puts them in a perfect position to follow up on the results delivered via self-service. Management can act as interpreters of the reports and guide agents toward improvement or correction, focusing on positive developments rather than spreading dread.

Self-service does not replace the need for coaching and development by supervisors. It makes coaching and development more effective by giving agents a solid understanding of where they are in the organization even before any coaching occurs. It also gives them a clear-cut

> If agents see themselves as virtually indistinguishable cogs in a large machine, they may have little reason to believe their individual needs are being heard and understood by management.

method to monitor their progress after they have been given a new direction.

Self-service in the contact center can begin tasks that are simple yet crucial: scheduling and schedule trades, exceptions, work preferences, performance statistics and the management of time off. But it also has the potential to do much more. It can lead to a sense of empowerment and better job satisfaction among the workforce. It can also become the bridge between agents and managers. By creating and maintaining an environment that rewards looking out for one's own interests as well as keeping a careful eye on company goals and performance, self-service creates value and ownership at the individual employee level.

It can also spare management from administrative burdens, freeing them to focus on bolstering and maintaining peak performance and operational integrity. Once agents see the power that self-service can bring them, they will be more likely to stick with the company over the long term. Based on these benefits, more companies are finding investments in agent self-service technology much easier to justify. **CIS** (news - alert)

*Rick Seeley has more than 15 years of contact center management experience. Prior to joining IEX (www.iex.com) as a workforce management and optimization technology consultant, he was a contact center manager at Brinks Home Security. In addition to his contact center management experience, Seeley was a founding member of the Board of Advisors for the Society of Workforce Planning Professionals (SWPP). He can be reached via e-mail at rick.seeley@iex.com.*

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so why isn't quality
improving?*

*Why can't we meet our
sales goals?*

*Why are we
overstaffed again?*

*I'm paying
to record everything,
so where's my ROI?*

*I know who's
scheduled tomorrow,
but what do they know?*

*How can I get
the strong agents to
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# Virtual Realty: The Virtual Call Center For Branch Office Organizations

Many organizations thrive by having both the critical mass of a very large national or global entity and the physical presence and customer relationship potential of a small local business. Banks, insurance companies and real estate companies all come to mind as examples. We'll explore how these types of organizations can benefit from a unified virtual contact center that seamlessly includes both central call centers and local branch personnel in a single system.

To make the exploration very specific (and more interesting), we will build it around the example of a national residential real estate company — we'll call it "Virtual Realty" — with hundreds of local offices. Most of the concepts presented here will easily translate into similar ones that would apply to banks, insurance companies and others. In fact, the applications for banking and insurance are arguably more obvious. The real estate business is oriented around decentralized sales, and its need for centralized customer service is limited compared to that of banks and insurance companies. It is incumbent upon real estate businesses to add enough value that their local agents benefit greatly by being members of the chain as opposed to setting up shop as local independents. Also, the real estate business is extremely personal in nature, and many calls are made to a specific person rather than to the company as an entity. Still, as we'll see, the creative combination of central and local resources made possible by a modern virtual call center has a real contribution to make to the productivity and success of such an organization.

We begin with a partial analysis of some of the major call types that Virtual Realty wants to cover. We will then set forth some of the call scenarios that the Virtual Realty's virtual contact center would provide, contrasting this with how non-virtual call centers would try to cover the same needs.

## INCOMING CALLS

### Dialed Number

Virtual Realty can categorize its incoming calls in a number of ways. One useful method is by the number dialed. There are three main types of numbers Virtual Realty uses:

- Individual broker DID or mobile phone numbers;
- Branch office numbers; and
- National toll-free numbers.

In the real estate business, as in many others, individual mobile phone numbers are replacing all other means of direct communication with a specific person. The issue is that the organization loses all control of these calls and actually loses track of them completely. Many of them go to individual voice mail and depend solely on the person called for a response. This is not an ideal situation. Of course, any improve-

**By Stephen R. Kowarsky**
CosmoCom

ment would have to respect the understandable desire of agents to protect and preserve their personal relationships with their customers.

Calls to branch offices are usually answered by a branch secretary or administrative assistant, whose most common responses are to provide the mobile number of the person being called (when the caller had a specific person in mind), or to take down information and have "someone" get back to the caller. It is expensive for every office to employ its own call answering personnel. More important, this is often a "hit or miss" proposition, since communication between brokers and office personnel is often limited.

Calls to a national toll-free number almost always go to a central call center reaching personnel trained for specific tasks according to the number dialed or caller choices from an automated attendant. At least some types of calls would be better served if they went directly to the relevant local office if qualified personnel were available at the time of the call. If not, the central resource is a good solution. Virtual Realty has developed a staff of "inside sales" people who work to support the local agents, with compensation programs designed to make every call a win-win for the inside

person and the local agent. While this pool is a shared resource, it is not physically "central," but rather consists of people in a variety of locations, including a number of home workers and junior agents in some of the local offices. Virtual Realty does have a physically central IT staff that has created the centralized customer information and listing information systems described in this article.

### Type Of Caller

Let us also identify some of the most important caller types that Virtual Realty works with:

- Sellers calling for the first time;
- Buyers calling for the first time;
- Relocation customers calling for the first time (both sellers and buyers);
- Sellers already working with the firm; and
- Buyers already working with the firm.

This is obviously a subset of the inbound calls, but it is sufficient, in conjunction with the various Dialed Number possibilities, to explore the ideal options that open up in a virtual contact center environment. Note that with just these five caller types and three dialed number types, we have identified 15 different call scenarios, more than we can completely cover in this article.

Buyers and sellers calling for the first time represent a low volume of traffic. In many cases, people will get a referral to an agent before calling for the first time. And those already working with the firm will tend to only call the agent directly.

### Local Office And National Calls

It's clear that some kind of automated-attendant dialog sorting out the above five (and other) caller types would be helpful in providing the most appropriate treatment. Callers would be identified as existing customers or first-time callers. As existing customers, they would enter their customer number. If new, they would be classified as buyers or sellers. One of the most appealing features of the virtual contact center is that it would provide the same dialog for both national and local office calls. Of course, the fact that a call was made to a specific local office will always be part of the final routing decision. But all calls will have the benefit of consistent, professional handling and a standardized categorization process.

### DID Calls

The virtual call center eliminates the need for individual brokers to give out their cell phone numbers, and solves the problem of losing track of calls. The system itself acts as a single-number server. Brokers can receive calls at their desks when they are in the office, and at their mobile phones when they are not. They can create schedules and call treatment rules, even at the level of defining that calls from specific numbers or specific customers be forwarded to them, and that others will go to voice mail. Every effort is made to locate and connect the call to the person called, but if this is not possible, a subset of the standard categorization dialog is used to identify calls that should be answered live by someone else rather than shunted to voice mail.

### First-time Callers

First-time callers, both buyers and sellers, are among the most critical contacts that Virtual Realty has. Sellers calling for the first time will simply go on to make the next call. Usually whatever company answers first (or calls them back first) with a good salesperson wins. Buyers calling for the first time may call

again if they are interested in a specific listing, but they too are likely working with a list and will move on to the next number on the list immediately. Therefore, a major objective is to make sure that every one of these calls is answered by a qualified salesperson 24/7. Fortunately, the virtual call center enables them to achieve this objective no matter what number is dialed.

The system always knows when qualified people are available in each local office. Calls are qualified and routed preferentially to the appropriate local office, but other localities and/or the central facility can always cover the call. Virtual Realty maintains a centralized staff of "inside sales" people who work to support the local agents, with compensation programs designed to make every call a win-win for the inside person and the local agent. Sellers do not have to wait for a callback to have all their questions about the Virtual Realty program answered, and to receive the information designed to convince them that Virtual Realty is the company of choice to represent their properties. No buyers have to wait to talk with someone about the specific listing that caught their eye driving by, or to have a substantive conversation about the kind of homes they are looking for. The inside people will not have the scope of information available to the local agents, but they will have access to a database that can answer many basic questions, and they will know how to talk to the buyers in a way that preserves their interest in working with Virtual Realty.

### Existing Relationships

Sellers and buyers already working with someone in the firm receive customer I.D. numbers they use whenever they call Virtual Realty. A database routes their calls with maximum intelligence, giving first priority to reaching the local people they are working with, and according next priority to any specific instructions that were entered by their local agents regarding specific callers. In the absence of special instruc-

tions from local agents, the calls will be answered centrally by inside sales people who will have access to individual customer records and who will be able to fill in intelligently for the people they have been working with, and leave properly screened and qualified messages for those people reporting on the calls and prioritizing the callback needs.

### Relocations

Relocations typically interact with at least two representatives of Virtual Realty, one on the sell side, and one on the buy side. With the virtual call center, they can easily reach both in one call, can easily conference with both reps at the same time, and can easily have either or both sides covered by one of the central reps, if necessary. Customers gain the impression that they are dealing with one entity that is interested in their total relocation package, rather than in just one part of it.

### OUTBOUND CALLS

### Lead Generation Campaign

Virtual Realty conducts an ongoing outreach campaign to homeowners throughout the company, offering them a "free market appraisal" of their home from one of their expert representatives. The objective of the campaign is to identify sellers and convince them to engage Virtual Realty as their representative. Virtual Realty constantly purchases lists and runs this campaign using the inside sales group during periods of low incoming call volume. Qualified leads are automatically distributed to the appropriate local office and further distributed to individual agents at the discretion of the local office manager.

In addition, any Virtual Realty local agent can "plug in" to the lead generation at any time by simply "going available" in the campaign. This action triggers the campaign manager to use lists in the available agent's target locations and to route calls to the agent. Any leads qualified in this way automatically

> **Customers gain the impression that they are dealing with one entity that is interested in their total relocation package, rather than in just one part of it.**

belong to the local agent who qualifies them. This is a productive use of agents' free time, and is particularly helpful to the younger agents who have not yet developed extensive personal networks that provide a steady flow of leads and listings.

### Summary

The virtual contact center unifying branches and central (or virtually central) resources enables Virtual Realty to offer an unprecedented level of customer service. They never miss one of those critical first calls. They are always available to talk competently with an existing customer, even if that customer's regular agent is not available. Lead generation is ongoing, and any agent can participate in the program at any time. Their customers are delighted, and they have developed the reputation of being the best relocation agents in the business. Finally, the virtual contact center creates a tremendous advantage in terms of creating sufficient value to the franchise to keep agents as members. All of these benefits must be made possible by an intelligent virtual contact center. **CIS**

*Steve Kowarsky is executive vice president of CosmoCom (news - alert) (http://www.cosmocom.com), providers of on-demand contact center technologies, and is a frequent industry speaker on virtual contact centers.*

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#### TMCnet.com Traffic vs. Technology/IT Web Sites

| Web Site | Alexa Site Rank |
|---|---|
| TMCnet.com | 2,379 |
| eWeek.com | 2,826 |
| Computerworld | 4,671 |
| InfoWorld | 6,618 |
| Network World | 8,394 |
| Light Reading | 14,655 |
| Pulver.com | 36,063 |
| Wireless Week | 40,701 |
| Destination CRM | 48,598 |
| Telephony Online | 58,251 |
| VoIP News | 76,801 |
| Telephony World | 121,573 |
| Call Center Magazine | 183,448 |
| America's Network | 185,033 |
| Telecomweb | 204,159 |
| CommWeb | 249,258 |
| Wireless Review | 317,334 |
| Communications News | 984,904 |

#### TMCnet.com Traffic vs. Business Magazine Web Sites

| Web Site | Alexa Site Rank |
|---|---|
| TMCnet.com | 2,379 |
| Fortune Magazine | 2,484 |
| Smart Money | 2,980 |
| Inc. Magazine | 4,984 |
| Fast Company | 5,259 |
| Business 2.0 | 5,986 |
| Barron's Online | 6,560 |
| Weekly Standard | 8,996 |
| Technology Review | 9,624 |
| CIO Magazine | 11,330 |
| BtoB Online | 23,419 |
| Worth Magazine Online | 174,723 |

#### TMCnet.com Traffic vs. Prominent Web Sites

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|---|---|
| TMCnet.com | 2,379 |
| Sharper Image | 4,152 |
| Volkswagen | 4,258 |
| Nokia USA | 4,351 |
| Coca-Cola | 7,670 |
| Brookstone | 10,045 |
| GE Appliances | 11,058 |
| Brooks Brothers | 14,899 |
| JVC | 15,692 |
| Black & Decker | 32,061 |

*Source: Alexa.com 12/5/05*

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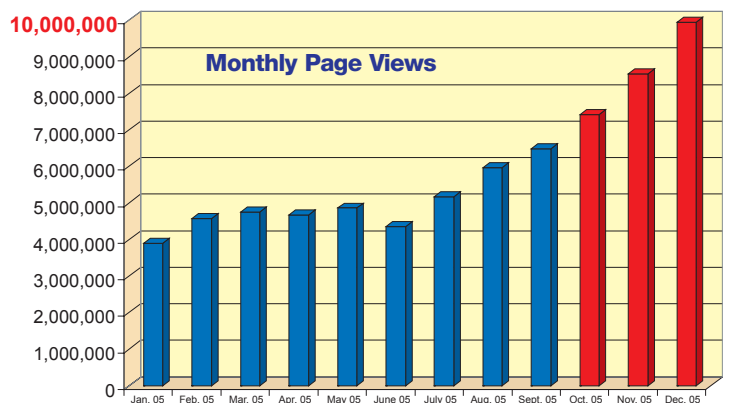- **Over 690,000 Unique Vistiors'***

*Source: Web Trends January, 2006

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### TMCnet.com's Daily Traffic Rank Provided By Alexa.com** (2 year graph)

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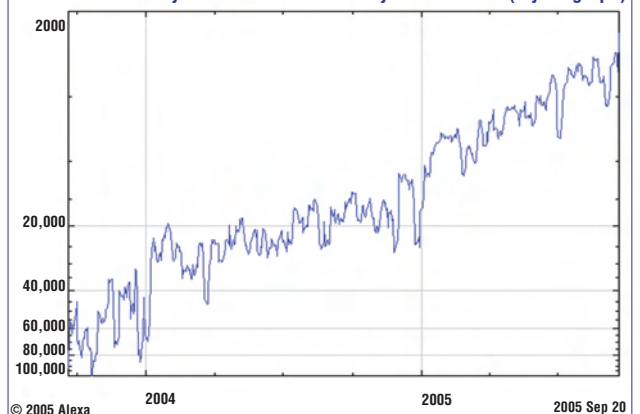
### Webtrends — TMCnet.com Tremendous Traffic Growth

**Monthly Page Views**

**Source: Alexa.com ranks Web sites by traffic. The number indicates a site's proximity to being the number one most visited Web site.    Date: 12/5/05 Alexa is an Amazon.com Company. Neither Alexa.com nor Amazon.com endorse, or are affiliated with, TMCnet.com in any way.

# 2005 Product of the Year Awards

Each year, *Customer Inter@ction Solutions*® magazine bestows its Product of the Year awards on companies that have demonstrated excellence in technological advancement and application refinements. Listed here are products and services that we've judged to have gone the extra mile to help improve both the customer experience and the ROI for the companies that use them. It is these companies' contributions that lead the way in making the contact center technology industry the dynamic field that it is today. The winning companies are broken down by general market category.

In the February issue of *Customer Interaction Solutions*, we will expand upon the simple list you see here, and include brief write-ups detailing each company's award-winning solution, making it easier for readers to drill down and find the solutions they're looking for. For now, rest assured that each of the companies presented on these pages brought a product or solution to market in 2005 that is certainly deserving of your attention.

Congratulations to the winners.

*— Tracey E. Schelmetic*

## Contact Center Suites

**Amcat**
Amcat Contact Center Suite, Enterprise Edition
www.amcat.com

**eGain Communications**
eGain ServiceExpress
www.egain.com

**M1 Global Solutions, Inc.**
Business Convergence Platform
www.m1global.com

**Noble Systems**
Noble RepliServer
www.noblesys.com

**Nortel Networks**
CallPilot 4.0
www.nortelnetworks.com

**Samsung Business Communication Systems**
OfficeServ 7200 Converged Communications Platform
www.samsung.com/bcs

**SER Solutions Inc.**
CPS E$^2$ Version 2.0
www.ser.com

**Siemens Communications Inc.**
HiPath ProCenter Standard V6.5
www.siemensenterprise.com/procenter

**Transera Communications, Inc.**
Seratel
www.transerainc.com

## CRM

**Amae Software**
Amae CI Suite
www.amaesoftware.com

**Aplicor, Inc.**
Aplicor CRM
www.aplicor.com

**Astute Solutions**
ePowerCenter
www.astutesolutions.com

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**Cincom Systems**
Cincom Synchrony 6.1
www.cincom.com

**Digisoft – A TouchStar Software Company**
eTelescript Guest Mode
www.digisoft.com

**Maximizer Software**
Maximizer Enterprise 9
www.maximizer.com

**NetSuite**
NetSuite CRM+
www.netsuite.com

**Oncontact Software**
Oncontact V
www.oncontact.com

**Portrait Software**
Portrait Foundation
www.portraitsoftware.com

**RightNow Technologies**
RightNow CRM 7.5
www.rightnow.com

**Sage Software**
Sage CRM
www.sagecrm.com

**SAS Institute Inc.**
SAS Marketing Automation 4.3
www.sas.com

**Sendia Corporation**
Sendia WorkSpace CRM
www.sendia.com

**SugarCRM**
Sugar Enterprise Edition
www.sugarcrm.com

**Tigerpaw Software, Inc.**
Tigerpaw CRM+
www.tigerpawsoftware.com

## Dialing Solutions

**TouchStar Software**
Dial-On-Demand
www.touchstarsoftware.com

## Disaster Recovery/Alerting

**AMTELCO**
Red Alert
www.redalertsystem.com

**Prosodie Interactive**
InfoCast
www.prosodieinteractive.com

## Display Technologies/Dashboards

**Symon Communications Inc.**
SDA (Symon Digital Appliance) Series
www.symon.com

**Informiam**
ClearPath for Contact Centers
www.informiam.com

## Interactive Voice Response (IVR)

**Plum Voice Portals**
MedTalk
www.plumvoiceportals.com

## IP Contact Center Platforms

**Aspect Software**
Aspect Uniphi Suite v6.1
www.aspect.com

**Avaya**
Avaya IP Office with Microsoft CRM
www.avaya.com

**Cisco Systems**
Cisco IP Contact Center Enterprise Edition
www.cisco.com

**CosmoCom**
CosmoCall Universe 4.5
www.cosmocom.com

**deltathree**
Launch Ready Outsourced Platform Solution
www.deltathree.com

**Eagle IP LLC**
EagleACD
www.eagleacd.com

**Five9**
Virtual Contact Center
www.five9.com

**FrontRange Solutions**
IP Contact Center (IPCC) 5.0
www.frontrange.com

**Genesys Telecommunications Labs, Inc.**
Genesys Enterprise Telephony Software (GETS)
www.genesyslab.com

**Interactive Intelligence Inc.**
Customer Interaction Center (CIC)
www.inin.com

**Kayote Networks, Inc.**
FronTier – Advanced VoIP Traffic Management System
www.kayote.com

**Telephony@Work**
Dynamic Customer Satisfaction Management
www.telephonyatwork.com

**Vertical Communications**
TeleVantage 7
www.vertical.com

## Knowledge Management/Business Intelligence

**Envision**
The Envision Report Server
www.envisioninc.com

**InQuira Inc.**
InQuira
www.inquira.com

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**PRODUCT OF THE YEAR 2005**
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www.knova.com

**Latigent LLC**
BlueVue II
www.latigent.com

**OutStart**
OutStart Participate V2006
www.outstart.com

## Performance Management/Training

**Aon Consulting**
REPeValuator
www.aon.com/tsc/repevaluator

**Co-nexus, Inc.**
CXM Agent Portal
www.4cxm.com

**Enkata**
Enkata 5
www.enkata.com

**etalk**
Qfiniti Enterprise
www.etalk.com

**Merced Systems**
Merced Performance Suite
www.mercedsystems.com

**Onyx Software**
Onyx Process Manager
www.onyx.com

**Opus Group (a division of Verint Systems)**
Opus Suite
www.theopusgroup.com

**Ulysses Learning**
CallMentor Learning and Performance Improvement System
www.ulysseslearning.com

**Verint Systems Inc.**
ULTRA IntelliMiner 9.4 Performance Intelligence
www.verint.com

## Salesforce Automation

**Concurrent Technologies**
CT.SFA
www.concurrenttechnologies.com

**VanillaSoft, Inc.**
VanillaSoft
www.vanillasoft.com

## Speech Technologies

**Nexidia**
Nexidia Enterprise Speech Intelligence 5.0
www.nexidia.com

**Utopy, Inc.**
Utopy SpeechMiner 3.5
www.utopy.com

**Vicorp UK Limited**
xMP
www.vicorp.com

## Surveys/Feedback

**Benchmark Portal**
Echo Customer Feedback Solution
www.benchmarkportal.com

## Testing Solutions

**Empirix Inc.**
Hammer Service Assurance for Cisco CVP
www.empirix.com

## Web-based Customer Service

**Citrix Online**
Citrix GoToAssist
www.citrixonline.com

**Glance Networks Inc.**
Glance 2.0
www.glance.net

**Inter-Tel, Incorporated**
Inter-Tel Remote Support
www.inter-tel.com

**KANA Software**
KANA Response
www.kana.com

**LivePerson Inc.**
Timpani 7.5
www.liveperson.com

**NextNine**
NextNine Service Automation
www.nextnine.com

**SpanLink Communications**
Spanlink's Web Q&A
www.spanlink.com

**Toshiba America Information Systems**
Toshiba Video Communication System
www.telecom.toshiba.com

## Workforce Management/ Performance Optimization

**IEX Corporation**
TotalView Workforce Management System, v3.9
www.iex.com

**Inova Solutions, Inc.**
Inova Performance Optimization Suite 5.1
www.inovasolutions.com

**Left Bank Solutions**
Monet WFM OnDemand
www.leftbanksolutions.com

**Witness Systems**
Witness Systems' Impact 360
www.witness.com

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**CIS**

# Moving To IP Telephony In The Contact Center

*Thorough preparation — and some good advice — will deliver huge benefits and help prevent common challenges when deploying IP-based contact centers.*

Internet telephony (IP)-based telephony is fast becoming the standard for many service organizations. These organizations are using the technology to boost efficiency and affordably scale both remote and local services. In addition to cost savings and service improvements, the convergence of voice and data allows a business to leverage a single infrastructure with all its benefits, including a centralized, virtual point of configuration and control of all dispersed contact centers. Given these benefits, it's understandable that many organizations today are eager to move to IP telephony in their contact center as they replace aging time-division multiplexing (TDM) systems or deploy new solutions for branch offices or enterprise departments. A complete business needs assessment and thorough planning for deployment and support will help companies reap the benefits of an IP-based contact center (IPCC) and avoid common pitfalls.

Like any mission-critical system, an IPCC requires a careful, deliberate implementation that proceeds methodically through the technology lifecycle: preparation, planning, design, implementation and post-implementation/

support. A robust, dependable IPCC solution can be deployed by taking a lifecycle approach that addresses all aspects of planning, implementing, operating and optimizing a converged solution, including people, processes and technology. Each stage has a series of steps and specifications that should be met before moving on. This approach helps align business and technical goals throughout the solution lifecycle.

In that spirit, here are some tips that will dramatically aid organizations as they plan, prepare and deploy their IP-based contact centers.

### The Right Team

A smooth implementation begins with a great team. Organizations must bring the right individuals to the project, and then must give the team the time and resources to do its job.

This is often easier said than done. In the traditional TDM ([define](#) - [news](#) - [alert](#)) world, the voice technology experts dominated decisions regarding

**By Laurent Philonenko and Parvesh Sethi**
**Cisco Systems**

contact center technologies. With IP, however, responsibility is shared among additional individuals, including business owners, voice specialists, data specialists and network engineers. Because the new environment touches upon all these areas, people with the appropriate skill sets must be represented on the team.

Team members must clearly understand their roles and responsibilities, and how they map to the overall business goal. A transition plan is very beneficial in addressing these organizational needs. For instance, employees who have maintained a company's data infra-

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structure may now be required to share responsibility with contact center application specialists. This cooperation is essential. To adequately capture multiple company perspectives and needs, the team should include such individuals as the executive sponsor, the business unit sponsors, the data network manager, the telecom manager, the voice network engineer and, representing the vendor side, the network consulting engineer and the applications consultant.

### Planning And Design

Once assembled, the team should proceed through a methodology that begins with planning and design. During this process, members will identify the detailed requirements of the call center and then map the future network to those requirements. They will address such issues as call center routing logic, self-service applications and legacy private branch exchange (PBX) configuration.

In identifying requirements, teams should pay special attention to areas that are sometimes overlooked. For instance, they may not take into account the need for custom reporting. With large contact center applications, custom reporting is practically inevitable, but sometimes is not identified at the discovery stage. As a result, a custom reporting capability needs to be added later. It is advisable to account for this functionality from the start.

The discovery process should take note of every component of the system, including those that may seem peripheral. Will a third-party application, such as a customer relationship management (CRM) application, be integrated into the environment? Are there legacy and home-built applications that will require interfaces? Team members also will have to clearly understand

such matters as availability, redundancy and security requirements. Scalability is another critical consideration. What are the growth expectations for the company, both in terms of workers and locations?

In exploring operational issues, the discovery process must assess not only the organization's current support infrastructure, but also its planned support requirements. An IPCC is quite different from a TDM-based call center. Previously, an organization's data and voice networks were distinct and, as a result, were managed separately. IP telephony, however, changed that. When the system is operational, the IT professionals supporting it must know how to manage a converged network. They must have a broader set of skills that includes knowledge of data, voice and applications operating on an IP infrastructure. This presents a tremendous personal growth opportunity for the staff involved.

### Staff Development And Opportunities

The issue of personnel training is another area sometimes overlooked by organizations deploying their IP-based contact centers. As part of the discovery process, team members should determine their staff development requirements. They should assess current in-house skill sets for each functional group and then perform a gap analysis. In this way, they will know from the start where they are strong, where they are not, and what training will be necessary for successful management of the solution. They will also better understand if they require new personnel and thus can begin the recruitment process as quickly as possible.

An early personnel assessment has another advantage. It will help spur support for the new solution among existing IT professionals. As mentioned previously, an IP-based contact center can be a vehicle for business and process transformation as well as career development. An assessment enables existing workers to understand

if there is any change in operations. They will have time to get comfortable with their new positions and even get a head start on additional training. In fact, it is a good idea to begin training early for all people affected by the IP-based contact center, including agents and supervisors.

### After Deployment

With the launch date in mind, team members may find it difficult to focus beyond the day of deployment. However, if an IP-based contact center is to operate successfully, day-after-deployment considerations should be taken into account well before implementation begins. The rest of the project team members must start thinking about the "day after" during the planning and design stages.

For instance, who will maintain and manage the environment? If managed in-house, have the administrators completed all the necessary training? If third-party vendors are used, have they been qualified or certified by the hardware vendor to perform remote management?

Remember, a converged environment is significantly more powerful than legacy technology, so there must be personnel in place with the skills to identify opportunities and ensure the organization is fully benefiting from the new system. Bandwidth and quality of service (QoS) settings may affect performance and should consequently be well understood and planned. Expertise, in-house or supported by professional services teams, has to be available on a proactive rather than reactive basis.

### Ongoing Optimization

Finally, an IP-based contact center offers the best operational efficiencies and service improvements with proactive monitoring and optimization. Is the call flow efficient? Are the self-service applications running optimally? Can the call flow be redesigned or fine-tuned to enhance performance? Unlike in TDM environments, continual network opti-

mization is a strength of IP telephony, since agent efficiency and the customer experience are constantly analyzed and improved. Moreover, IP telephony allows organizations to better adapt to the ever-changing needs of their industries. Converged voice/data personnel must be adept at performing this monitoring and fine-tuning.

IP technology can dramatically boost customer service and employee productivity within the contact center. But proactive planning and preparation are essential in order to reap the maximum benefits of the technology. Heeding the above advice can go a long way toward a smooth implementation and enhancing system reliability and performance while reducing the contact center's total cost of ownership. **CIS**
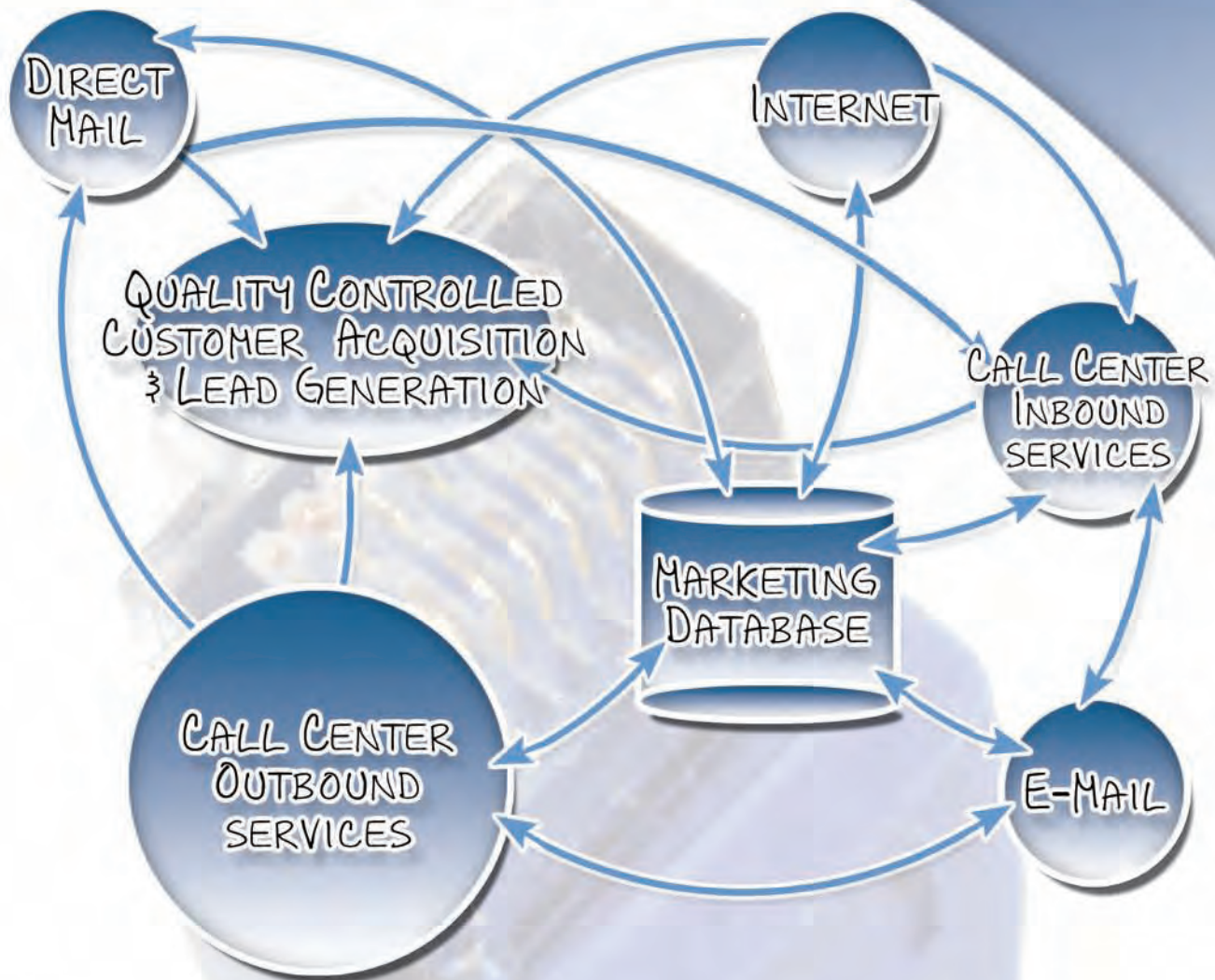
*Laurent Philonenko is Vice President and General Manager of Cisco Systems' Customer Contact Business Unit, which provides contact center and interactive voice applications to enterprises and service providers. (news - alert)*

*Since March 2000, Parvesh Sethi has been a member of Cisco's Customer Advocacy team and is currently serving in the capacity of VP, Advanced Services. In this role, he has worked with the various lines of businesses, Sales, Strategic Alliances and Customer Advocacy to help develop and drive the Professional Services competency in key technology areas for both service provider and enterprise market segments.*

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> If an IP-based contact center is to operate successfully, day-after-deployment considerations should be taken into account well before implementation begins.

## Metaphor Solutions And XO Interactive Forge Reseller Agreement

**Metaphor Solutions** (news - alert) and **XO Interactive (XOI)** (news - alert) have announced a reseller agreement for XOI to deploy Metaphor's speech IVR applications on XOI's hosting infrastructure. The partnership enables XOI to offer all 30 packaged and configurable Metaphor applications and use its lifecycle management tools as part of XOI's teleservices offering.

Metaphor provides more than 30 packaged speech IVR applications in markets that include financial services, retail, healthcare and the enterprise. Examples of speech applications include telephone banking, bill collection, prescription refill, location finder, inventory and pricing request, customer surveys, password reset and literature request, as well as SpeechOutlook, which allows travelers to name-dial any one of thousands of Outlook contacts by calling just one number.

These applications allow companies to deploy speech solutions on popular IVR platforms quickly and at a lower total cost of ownership, while still maintaining a high standard of automated service using speech. In addition, Metaphor offers customers and partners a suite of Web-based, application life-cycle management tools that include Application Configuration, Report Generation and Application Monitoring, as well as a development environment based on C# and .NET technologies, enabling IT developers to more easily customize and deploy speech applications.

**www.metaphorsol.com**

## Loquendo Releases ASR 7.0 Solution

Speech technology provider **Loquendo** (news - alert) has announced the release of its Loquendo ASR 7.0 product. The new release for Loquendo Automatic Speech Recognition offers new features and, according to the company, represents a significant step forward in terms of automatic speech interaction. The new integration API has been redesigned to simplify integration tasks and better exploit multithread environments. System integrators can take advantage of them for integration in advanced environments such as Microsoft .NET and Java.

With Acoustic Model Composition, speech application developers can achieve enhanced voice recognition performance for specific tasks. By employing either Standard or Specialized Acoustic Models, a more flexible performance is possible in various diverse speech contexts: the recognition of a specific vocabulary (e.g., a string of digits, specialized command words, yes-no responses), the recognition of speech from a variety of audio channels, (e.g., VoIP, GSM/UMTS), and recognition in particular sound environments (e.g., in-car).

Loquendo ASR selects the most appropriate types of Acoustic Model, based on the grammar in use, and allows the simultaneous recognition of grammars based on different Acoustic Models.

In this new software release, the voice recognition performance for the German language has been further refined and improved to better support customer needs.

**www.loquendo.com**

> "Language is legislation, speech is its code. We do not see the power which is in speech because we forget that all speech is a classification, and that all classifications are oppressive."
>
> — *Roland Barthes (1915–1980), French semiologist*

### Definition Du Jour

#### WOZ (Wizard of Oz) Testing

The process of creating a mockup of a new speech application and then listening live to callers' interaction with the system for the purpose of usability testing. The Wizard of Oz reference comes from the fact that the user is unaware he or she is being tested by the proverbial "man behind the curtain".

## Synchrony

**Cincom Systems, Inc.**
55 Merchant St.
Cincinnati, OH 45246
Ph: 800-2CINCOM
Web: www.cincom.com



Figure 1. Agent's desktop screen displaying an activity.

(news - alert) With technology constantly changing and new communications methods being created, companies are yearning for solutions that can help them manage multiple customer touch points as well as integrate their disparate database systems. Synchrony is a customer experience management (CEM) solution that enables small and mid-sized organizations to combine multichannel contact center functionality with a powerful Universal View Web-based portal. Universal View searches a company's various business systems looking for information about a particular customer, and then intelligently and instantaneously presents only the relevant information about that customer to the agent's desktop; for example, the details of a specified customer activity (see Figure 1). Available in both on-premise and hosted service versions, this universal portal delivers productivity gains by providing a consolidated portal of the information necessary to optimize each customer interaction, including the ability to connect to and display a company's accounting system, billing and CRM database. Also, Synchrony uses a multitenant architecture, which allows multiple clients to reside on the same infrastructure, which keeps costs low.

Synchrony is completely thin-client, using dynamic HTML and CSS (cascading style sheets), which is an improvement over the previous version, which

required JREE (Java runtime execution environment). Because it is completely thin-client, users can easily customize the interface using templates. The templates are based on Velocity templates, which allows users to render data from within applications and servlets, and it separates templates from Java code. Due to this architecture, every screen can be customized down to the campaign level.

One of the most important competitive advantages of Synchrony is that it integrates e-mail, fax, phone and chat. For instance, it integrates an e-mail inquiry along with a phone inquiry for the same problem/issue, whereas many competing systems are segmented. Another nice integration capability is as follows: when an agent takes the next trouble ticket, the system will automatically display the appropriate customer record on the agent's screen using various methods, including e-mail address, IVR account number entered or teleph-

ony number. It also features a phonetic search tool to find contacts or companies phonetically if the agent is unsure of the exact spelling.

The interface is well laid out and well designed. It features smart tabs that can be hidden, depending on the issue selected. When a user switches tabs on the browser, the screen instantly loads the information, so there are no performance issues. The top of the screen lists the current number of phone, chat, fax, e-mail and tasks in the universal queue, giving users a nice snapshot of what's happening. At the top left of the
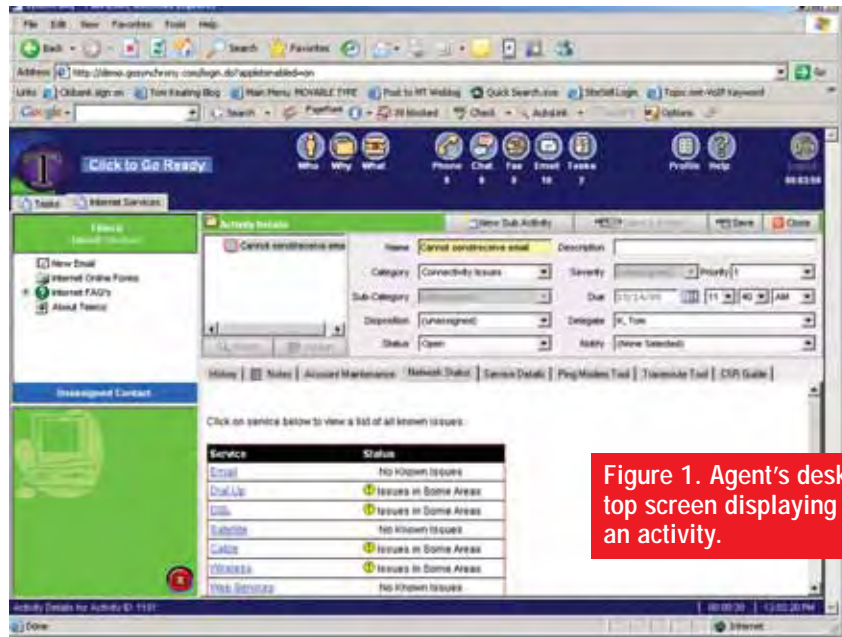
**RATINGS (0–5)**
**Installation: 5**
**Documentation: 5**
**Features: 5**
**GUI: 4.75**
**Overall: A**
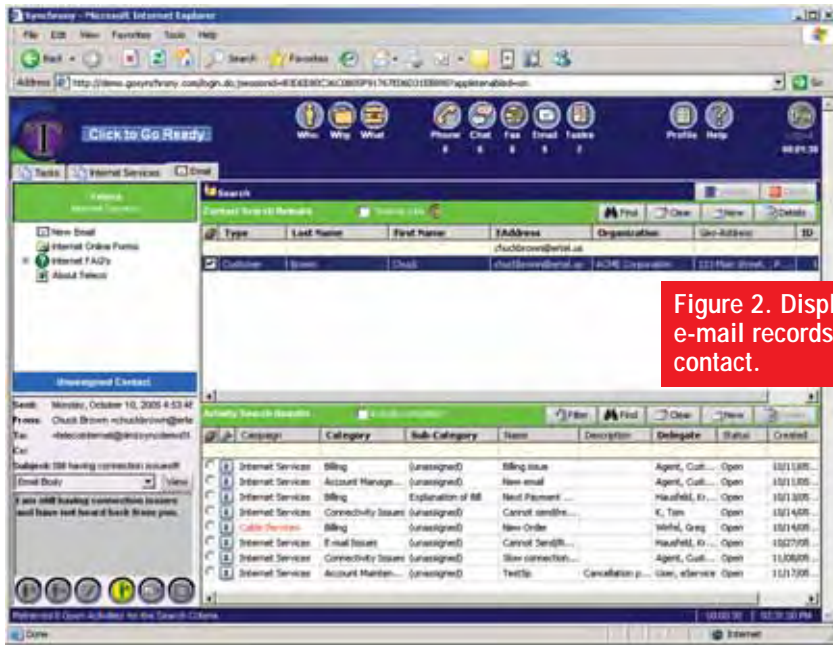
Figure 2. Displaying e-mail records for a contact.

screen is the "click to go ready" button, allowing the agent to become available to take the next task.

One important part of the interface is the smart tabs. Synchrony's smart tabs feature exposes and provides access into relevant back-end systems and databases and changes based on defined business variables, turning the desktop into a dynamic view of the customer. We liked Synchrony's smart tabs feature since it exposes the agent to only the relevant information for that specific customer interaction, which helps to keep the amount of data on the screen limited to eliminate potential agent confusion. Managers can customize the smart tabs to give agents only the resources they need for specific transactions, which helps shorten the call handling times. The e-mail interface is simply another tab that lists the historical e-mail interactions for a particular contact record, as shown in Figure 2.

One interesting feature is that it can take a fax-to-e-mail solution from RightFAX, GFI, etc., parse it using OCR, dump the text into the database and then prioritize it for the agent accordingly and place it into a separate fax

queue. Another priority-related feature is the solutions' ability to detect "platinum" customers. It can, for example, override the default priority of phone over e-mail. If a platinum customer sends an e-mail, it will jump to the head of the queue.

The universal queue manages all of a company's interactions across all channels, including phone, e-mail, chat and fax, which has obvious synergies. Not only does it provide a single location for managing the incoming flow of various customer interactions, Synchrony provides intelligent routing that connects customers to the most appropriate available agent.

Additionally, it's important to note that many call centers require that agents toggle between multiple screens to access separate database systems. This is time-consuming, hurts agent productivity, increases call times and increases customer frustration. In addition to combining all of a call center's interactions into a universal queue, Synchrony also combines disparate data into one Web-based application.

Synchrony does an excellent job of measuring agent productivity by calculating the amount of time the agent

spends on any particular activity. For instance, if an agent changes tabs (e.g., e-mail tab to the phone tab) while working on an activity, the system pauses the "work clock" so supervisors can see a more accurate representation of the actual amount of work spent on a particular activity. This way, it won't appear that the agent spent two hours on a single e-mail. Other interesting features include the ability to record e-mail activity (and tie it to the contact record) as well as the chat transcript for future retrieval. Reporting is very powerful and uses the popular Cognos reporting and analytics engine.

### Room For Improvement

We were impressed with the usability and flexibility of Synchrony. The only suggestion we have in terms of usability is to allow some keyboard shortcuts to navigate through the tabs. For instance, in Windows, "alt-tab" lets users switch between applications. Often, "shift-tab" lets users shift through an application's tabs. Unfortunately, "shift-tab" doesn't tab you through the various smart tabs on the Synchrony screen. We'd also like to see VoIP support, and we were informed that this will be available sometime in the first quarter of 2006.

### Conclusion

The most advantageous feature of Synchrony is that it integrates all of a company's disparate databases into a single unified interface. This results in reduced training times, as a consistent interface is much easier for agents to learn. Cincom's Synchrony multichannel customer experience management system handles all types of customer transactions, including phone, e-mail, fax, Web collaboration, chat and call-me. With its advanced CRM capabilities, including contact information, accounting integration, activity/issue tracking and interaction history, Synchrony covers the whole gamut.

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

# The Inbound New Year, And A New Year Of Inbound

Despite the fact that this column is appearing in the January issue of this magazine, I'm writing it on December 21st, the old-fashioned festival of Yule, or Midwinter, which marks the winter solstice. This time of year always seems to lead numerous writers, journalists, analysts, commentators and anyone else behind a keyboard to look backwards and forwards simultaneously (whether we want them to or not). As we all know from grade school, January is named in honor of Janus, the Roman god with two faces who looks both backwards and forwards at the same time. This being a call center magazine, I'll try to limit my observations to all things telecommunications. You needn't fear I'll get maudlin — it's hard to get misty-eyed sentimental about cellular phone service, voice over IP or data security. Or, if you do, I'll be bold enough to suggest that you may want to consider taking up a hobby during the New Year.

Though this magazine has covered the call center industry for nearly 25 years, the 1982 version of the industry and the 2006 version bear little resemblance to one another, except in their end goals of aggregating and automating telephony-based and electronic customer service and sales. But nobody's business behavior happens in a vacuum. It's usually an echo of how we behave in our personal lives.

Things that would have been worthy of a CNN.com headline just a few years ago, such as "Majority of Americans' primary communication with others is via e-mail" or "Most consider their mobile phones their primary phones" elicit only a yawn now. Though legislation regulating outbound has certainly been a contributor to that selling method's decline as a sales tool, technology has foiled outbound, as well. Neither cellular phone numbers nor residential VoIP numbers are listed in phone directories (and there's a prohibition against calling cell phones anyway), so the available pool of consumers both willing and able to receive phone solicitations dwindles each year. Many younger consumers are ditching land-line phones entirely and relying on cell phones.

I keep a VoIP phone in my living room. When it rings, I know it's either my mother calling or my dentist's office to remind me of my next teeth cleaning.

As a result, business-to-consumer companies will increasingly be relying on "turning inbound into outbound" in the coming years. Upselling and cross-selling used to be gravy income…nice if you could get it. As many companies nowadays have contact with their customers only when the customer calls the call center, upselling and cross-selling are becoming a more established part of the business plan. This requires more skilled inbound agents. As companies increasingly move to consolidate their processes to save time and money, yet are under pressure to escalate revenue, today's inbound call is like a cosmological event horizon for many companies. So many things could happen during that call. The customer might start the conversation annoyed at a billing problem or a return. The agent might mishandle the call and enrage the customer, causing him or her to churn.

Alternatively, the agent might defuse the customer's annoyance, take care of the problem in one shot, building the customer's loyalty to the company, and end the call having upsold the customer beyond what he or she is already spending with the organization. At the same time this make-or-break scenario is going on, many things are ticking: average handle time and queue length; impatience on the part of other callers in queue (some of whom may be platinum customers), call recording (which will ripple into the agent's performance evaluation); and ROI on the call center's equipment investment.

Additionally, the customer service doesn't end when the happy customer hangs up. If he or she follows up with one more question in an e-mail 10 minutes later, it's critical that he or she doesn't receive contradictory or confusing instructions, which would un-do all the telephone agent's good work in about three seconds. The number of consumers shopping via the Internet soars far beyond all predicted expectations each year.

What does this all mean? It means that it's not farfetched to refer to today's call center as the single most critical element of any business-to-consumer company. Many companies have been slow to recognize this. You know which companies these are: the ones that provide you with a frustrating experience every time you call. What I wonder when I deal with these companies is…where do they imagine they're going to build their revenue? Via orders coming in by smoke signal? Are they going to hire a base-plus-commission direct sales force 50,000 strong to sell $24.99 items face-to-face in shopping mall parking lots? Perhaps they sit and wait for the tooth fairy to fly in the window and drop boxes of orders into their laps.

If it wasn't so journalistically trite to call 2006 "The Year Of The Contact Center," I would do it. But it is, so I won't. So I'll call 2006 "The Year Of Cheese-making," and merely operate with a hidden agenda all year.

Happy New Year.   **CIS**

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