



# CUSTOMER INTER@CTION *Solutions*



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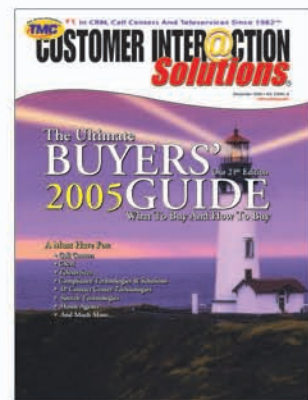
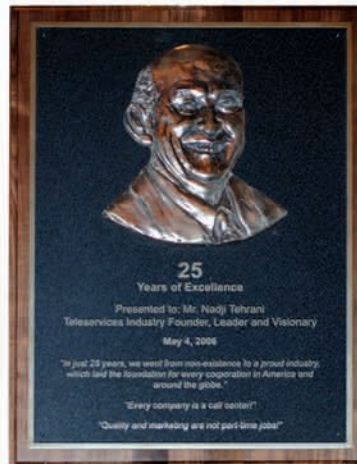
#1 In CRM, Call Centers And Teleservices Since 1982™



## 1982 - 2006



25 Years Of Moving CRM And  
Contact Centers Forward



## Also In This Issue:

- The Call Center And Teleservices Event Of The Year Celebrates The Last Quarter Century
- Twenty-Five Years Of Call Center Innovations: A Retrospective
- Lifetime Achievement Award Recipients Announced



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# *Congratulations* **TMC!**

InfoCision would like to congratulate TMC on the  
**25th anniversary of *Customer Interaction Solutions*.**

Under the leadership of **Nadji and Rich Tehrani**,  
*CIS* has set the call center industry standard for quality  
since 1982. We are proud to be recognized as the leader  
among the distinguished list of MVP and Top 50 honorees,  
who continue to raise the bar for **teleservices**.



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# 25

*Years*



# If you value your customers...

## ...why do you keep them ON HOLD?



With **InfoCision**, they won't be.

We answer your calls quickly and develop a lasting relationship with your customers. A few minutes on the phone with InfoCision means a lifetime of customer loyalty for you.

**9 seconds**

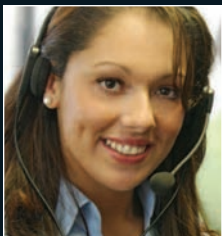
Average time to answer inbound calls.

**92 percent**

Percent of inbound calls answered in 20 seconds or less.

**3 percent**

Overall percent of inbound calls abandoned.



**InfoCision**  
THE highest quality call center company in the world!®

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[www.infocision.com](http://www.infocision.com)

\*InfoCision is the only teleservice company to win the MVP Quality Award, presented by *Customer Interaction Solutions* magazine, all 13 years since its inception.



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



## 25 Years Of Moving CRM And Contact Centers Forward

In Just 25 Years, We Went From Non-Existence To A Proud Industry That Laid The Foundation For Every Corporation In America And Around The Globe

Technology Marketing Corporation (TMC) was founded in May of 1972. At that time, we published advanced chemical technology publications such as *Radiation Curing*, *Powder Coatings*, *High Solids Coatings* and *UV Curing Science and Technology* magazines and textbooks.

In November 1981, I was disappointed with the sales results of our outside sales reps, so one day, I decided to get on the phone and see if I could sell advertising by telephone for our various publications. Indeed, it turned out to be a great new discovery — I was able to sell four pages of advertisements in the first hour. To make sure that I could reproduce this potential discovery, I continued selling one hour a day for the entire week and

the industry was born...at least to the best of our knowledge.

### Mistake #1

I called the outside sales reps to our office and asked them to start selling by phone. None of them was able to sell anything significant by phone. Consequently, they resigned. At that time, I didn't know why, but today I understand. The reason is that the techniques that one needs to sell in person are vastly different than the techniques required to sell by phone.

### Mistake #2

I interviewed several people in person, and none of them was able to sell on the phone. At that time, once again, I did not know the reason for this failure. Today, we know the reason. If you want someone to be successful in selling by phone, you must interview that person on the phone and ask them one key question; that is, "Tell us why we should

**As I have stated in many of these editorials, every company is a call center, and if you take the telephone out of any company, it's only a matter of time before that company will go under.**

by the end of the week, I was able to sell approximately 15 pages of advertisements strictly by phone! Then, I believe,





Callers will always expect more. Choose the IVR platform that delivers – today and tomorrow.

Choosing a technology platform is a long-term commitment for your contact center. You need a platform that's flexible, backed by experience, and delivered by a company that's committed to your success over the long haul.

Microsoft Speech Server provides greater flexibility through its power to integrate with current and future telephony infrastructures and support for the widest array of applications, ranging from DTMF to natural speech. We bring vital experience with a robust partner ecosystem, successfully deploying solutions in high-volume contact centers answering millions of calls. And because Microsoft Speech Server integrates with and leverages your existing infrastructure, you get industry-leading total cost of ownership performance, year after year.

To find out how Microsoft Speech Server can help you deliver a better caller experience faster, contact us at **877.675.3555** or **[mssvp@microsoft.com](mailto:mssvp@microsoft.com)**



hire you for this position?" If the sales person is not able to answer convincingly, then you must not hire that person.

I was very confused as to why I was the only person who could sell by phone, and no one else. I told myself that this couldn't be the case. I then went to one of our long-time secretaries and asked her to come in for training in the hope that she also would be able to sell. She first said, "Mr. Tehrani, I am the world's worst sales woman." Obviously, that was not the answer I was looking for. I told her that I had a \$500 bonus for her if she could adopt a positive, can-do attitude and simply do what I do in a conference call with the customers. I added, "You don't have to sell anything, but you have to have a completely positive attitude about it and try to sell with passion." She liked the idea, and got on the phone. Lo and behold, she started selling tremendously. After three months, sales were up 50 percent over the prior year, and after she returned from a trade show, where she met many prospective advertisers, sales went up another 100 percent.

## **"Nothing great is ever achieved without an outstanding team of industry pioneers."**

Therefore, the industry was born. The keys to her success were great product knowledge, an excellent phone manner and a very pleasing voice.

### **We Trademarked Telemarketing®**

Perhaps one of the good things that we did at that time was to obtain the registered trademark for the word "telemarketing®" and as such, our pioneering of this industry was solidly verified.

### **Nothing to Write About!**

We continued printing articles for two issues, after which my editor came to me and said, "I can't find anything to write about. Are you sure this is an industry?" I stated that, "No, I am not sure, but we are going to make it an industry!" For the tagline of

*Telemarketing®* magazine, which we started in June 1982, we used the following: "The magazine of electronic marketing and communications."

Indeed, many people ridiculed the idea and stated that marketing would never be done electronically! Here we are, 25 years later, and practically everything we do is done electronically; for example, electronic marketing, electronic commerce, e-business, etc. I suppose that we did have the right vision that someday, this new and revolutionary method of marketing will conquer the world and everyone around the globe sooner or later will adopt it.

### **The First Industry Trade Show**

In 1985, we launched the industry's first trade show, called Telemarketing

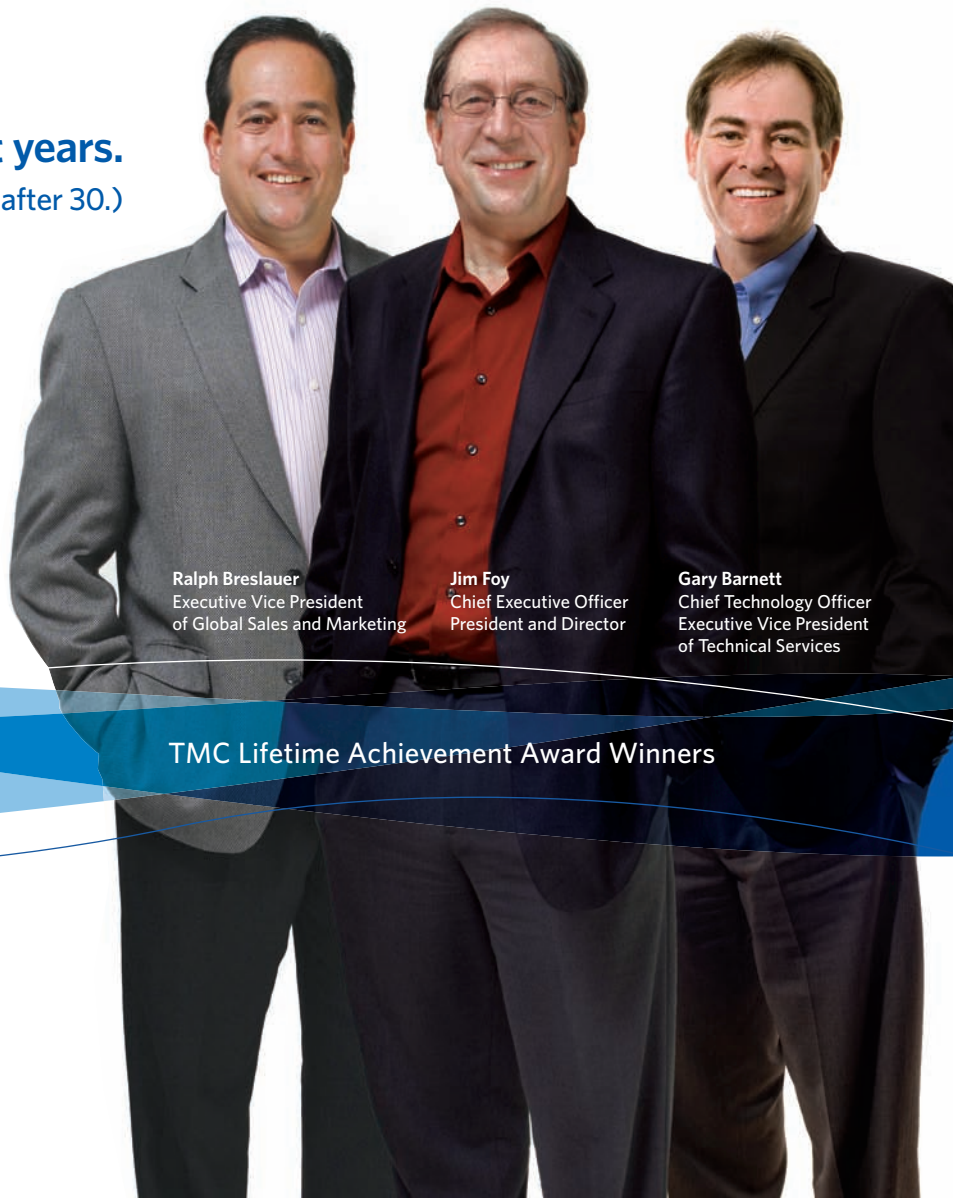


**FIGURE 1.** L to R: Tom Rocca, President, KPI Group, LLC; Steve Brubaker, VP, Corporate Affairs, InfoCision Management Corp.; Richard Brock, CEO, Firstwave Technologies, Inc.; Hayley Savage, Senior VP, Sales & Marketing, Influential, Inc.; Nadjia Tehrani; Jack Early, Founder, Early Cloud & Co.; Albert Subbloie, President & CEO, Founder, Tangoe Inc.; Ed Blank, Edward Blank Associates; Robin Richards, CEO & Chairman, The NTI Group; Ray Hansell, Chairman, Marastar Communications

Celebrating 25 years of *Customer Inter@ction Solutions*

## Congratulations on 25 great years.

(At Aspect, we know it gets even better after 30.)



**Ralph Breslauer**  
Executive Vice President  
of Global Sales and Marketing

**Jim Foy**  
Chief Executive Officer  
President and Director

**Gary Barnett**  
Chief Technology Officer  
Executive Vice President  
of Technical Services

### TMC Lifetime Achievement Award Winners

The entire Aspect Software team would like to congratulate *Customer Inter@ction Solutions* for 25 great years. Having been around over 30 years ourselves, we have a special appreciation for what it takes to become a leader in the contact center industry. Just remember to go easy on the cake, you're not as young as you used to be.



and Business Telecommunications® (TBT). With our conferences at TBT, we trained the world. Indeed, marketing executives and CEOs of companies around the globe attended the TBT conference and exhibitions regularly, without fail. Companies from Japan, Korea, the United Kingdom, Holland, Belgium, France, Italy, South Africa, Ireland, Brazil and many others were among the earlier adopters of the new telemarketing concept which was, in fact, the most effective way to sell products and provide customer service. The global attendees of TBT learned the principles of telemarketing and then trained future telemarketers around the globe.

### The Early Debate

At that time (in the mid 1980s), I continued to refer to our new method of marketing as an industry. As the industry began to grow, with TMC serving as the cheerleaders or evangelists, if you will, I found significant opposition from a few industry leaders to calling it an industry. They suggested that maybe we should call it a new discipline. I am happy to share with you that recently, at our 25th anniversary gala, held on May 4, 2006 in New York City, many of the same non-believers came up to the podium and stated, "Twenty-five years ago, Nadji told us that this was an industry, and we didn't believe it. Today, we believe it!"

### Call For Automation

In the spring of 1984, in one of my editorials, I called for the automation of the young and rapidly growing telemarketing industry. Indeed, if you are going to make millions of calls per day, you will need to get help from technology. After this announcement, several entrepreneurs responded, and they were among the first companies to provide software for sales, marketing, customer service and monitoring services. Some of the early pioneers of our industry may be seen in Figure 1 (the caption provides the identity of these pioneers).

### Industry Development

In the mid 1980s, predictive dialer technologies began developing, and such dialers were adopted by many outsourced teleservices companies as well as in-house telemarketing centers, which are now called call centers, contact centers and/or CRM centers. The primary use of predictive dialers, of course, was for outbound telemarketing for such applications as collections, lead generation and sales support, etc. The ACD (automatic call distributor) technology, which had an earlier history of development than predictive dialers, was developed in the late 1970s and early 1980s by such pioneers as Rockwell, Aspect, Teknekron Infoswitch, etc.

- E-learning;
- Home agent technologies; and
- Last, but not least, workforce optimization.

The above technologies were among the many significant developments which, along with the advent of voice over Internet protocol (VoIP), were the catalysts that took the industry to the next level. For example, the use of VoIP technology has the potential to reduce the cost of telecommunications by at least 90 percent, and the application of advanced speech technology has shown the potential to reduce labor costs by 85 percent. Together, the adoption of VoIP and speech technologies will drastically increase product capability.

**Our proud industry started with humble beginnings, affected many lives positively, heavily impacted the world economies, touched millions of lives and supported millions of families around the globe.**

The contributions of technology providers to the development of the contact center industry has been of vital importance following ACD (define - news - alert) development, which was the foundation of inbound telemarketing, and predictive dialers, which were the main workhorse technology of outbound telemarketing.

Many other significant technologies were developed in the 1990s and this development continues today. Such developments include:

- CRM technology;
- Workforce management;
- Monitoring;
- IP contact center technologies;
- Speech technology;
- Outsourcing technologies;
- Offshoring technologies (VoIP);
- Data security;
- Performance management and optimization;

As such, the development of the above technologies by many solutions providers must be regarded as the most vital element for taking our industry to the next level.

### Teleservices Agencies Also Contributed Significantly

In the 1980s and beyond, the actual process controls, methodology and application of sound telemarketing and contact center applications were indeed developed primarily by telemarketing service agencies, which are now called teleservices outsourcing companies.

These teleservices outsourcing companies, which collectively (including the Top 50 Teleservices Agencies companies) use in excess of 18 billion billable long-distance minutes per year, have gained tremendously more experience than any other call center, in-house or otherwise. Indeed, the Top 50 inbound







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You get all the powerful tools that have made Monet the choice for call centers, large and small, all over the world. Quickly schedule by agent profile and experience. Build customize shifts and seasonal schedules. Test scenarios. Respond to real-time volume fluctuations. Create unlimited agent groups with special skills or objectives. All with extensive analytical and reporting capabilities and backed by an exceptional team of help-desk professionals. And, as powerful as those tools are, Monet remains easy to implement. It integrates with all popular ACD and VOIP solutions. Monet even offers the option of hosted, OnDemand service.

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# Monet

*The Art of Workforce Optimization™*

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and outbound companies ranked by *Customer Inter@ction Solutions*® for 21 consecutive years represent the leading contact center practitioners in the world. These companies, while practicing the telemarketing principles, laid the foundation for effective business transactions over the phone. To use the words of Steve Idelman, who is regarded by many as the "King of Outbound Telemarketing," the business community found that, "There is no business like phone business." Indeed, corporations soon discovered, in the early 1990s and beyond, that telemarketing outperforms

any other method of selling. Today, we have learned that the telephone is also another outstanding tool of building relationships and providing customer relationship management, or CRM. In short, as I have stated in many of these editorials, every company is a call center, and if you take the telephone out of any company, it's only a matter of time before that company will go under.

#### The Name Change And Accolades

As the industry evolved, *Telemarketing*® magazine became *Call Center CRM Solutions*™ magazine and

eventually became *Customer Inter@ction Solutions*®. Along the way, *The Wall Street Journal* gave this publication the ultimate accolade; namely, that "*Telemarketing*® magazine is THE BIBLE OF THE INDUSTRY."

#### Consultants Provided Significant Training And Services

Indeed, our industry also benefited significantly from the contributions of several prestigious leaders of the consulting sector. Leaders among them are Jon Hamilton, Thomas M. Rocca, Steve Riddel, David Yoho, Judy McKee,



FIGURE 2. 25 Years Of Excellence Plaque presented to Nadji Tehrani by InfoCision Management Corp.





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body knows, they're empowered, in sync with business priorities,

and making smarter decisions. Find out more, and get your FREE

real-time white paper at [www.Now-Everybody-Knows.com](http://www.Now-Everybody-Knows.com)





Rudy Oetting, etc. In short, the achievement of the development of the contact center industry was truly teamwork — everyone mentioned in this article, as well as many others, has made a significant contribution to our industry.

**Telemania Lifetime Achievement Gala Sponsored By CIS Recognized Industry Pioneers, Visionaries, Founders And Legends On May 4, 2006 At The Marriott East Side Hotel In New York City**

*[Editors Note: See page 42 for photographic coverage of this spectacular gala, attended by over 100 industry CEOs and pioneers.]*

The evening began with InfoCision's Steve Brubaker recognizing me and TMC as the founder of the industry on behalf of the contact center industry. He humbled me and honored the dedicated and brilliant employees of TMC by offering me a special recognition plaque

as seen in Figure 2 on the previous page! Frankly, I was speechless, as I did not expect it. The audience, comprised of over one hundred CEOs, Chairmen, Presidents, Founders, etc., further humbled me by giving me several standing ovations! In my acceptance speech I said, "Nothing great is ever achieved without an outstanding team of industry pioneers." My award would have been more suitable for those industry pioneers and the dedicated TMC team (see Figure 3).

### The Gala Was Spectacular

The leading past and present luminaries networked, received their awards and gave phenomenal acceptance speeches (see photos and coverage on page 42.)

Many past industry leaders are now multimillionaires, and three of them are now billionaires.

In short, our proud industry started with humble beginnings, affected many

lives positively, heavily impacted the world economies, touched millions of lives and supported millions of families around the globe.

Yes...we might proudly say: WE MADE A HUGE DIFFERENCE in the world economy, in the world of business and indeed, we revolutionized marketing by calling it *Telemarketing®*: The magazine of electronic marketing and communications.

### Looking Back

Of course, building a multibillion dollar global industry from scratch is no easy task. We could not have done it without the help of the outstanding visionaries, many of whom are identified in this editorial and in this issue.

Indeed, it was a rollercoaster ride. There were a lot of challenges, but in the end, with God's help, your help and TMC employees' help, we succeeded and we made it!



**FIGURE 3.** The TMC Team (L to R): Dave Rodriguez; Robert Liu; Karl Sundstrom; Allan Brown; Natasha McArthur; Rich Tehrani; Nadji Tehrani; Kevin Kiley; Tracey Schelmetic; Michael Genaro; Kevin Noonan; Frank Coppola

**old rule:**

Efficient  
call routing is  
good enough.

**NEW RULE**

{ **Agent effectiveness will  
boost your bottom line.**

Efficiently routing and handling calls will always matter in a call center. But e-mail, the Web and consumer demands have created the value center, which also requires optimizing your agents' effectiveness and performance.

And that requires managing everything from workforce schedules, skill sets and availability to historical data and demand forecasts.

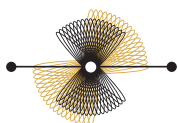
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One fully integrated WFM application, on one equally integrated IP contact center platform.

All the forecasting, scheduling, real-time adherence and multimedia control you need to make every agent more effective.

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### Lifetime Achievement Award Honorees

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**Kathryn Barber**, Barber Consulting  
**Gary Barnett**, Chief Technology Officer and Executive VP, Worldwide Customer Support, Aspect Software  
**Edward Blank**, Founder, Edward Blank Associates, Inc.  
**Eli Borodow**, CEO and Co-Founder, Telephony@Work  
**Ralph Breslauer**, Executive Vice President, Global Sales and Marketing, Aspect Software  
**Richard Brock**, Chairman and CEO, Firstwave Technologies, Inc.  
**Donald E. Brown, M.D.**, Chairman of the Board, President and CEO, Interactive Intelligence  
**Steve Brubaker**, Vice President, Corporate Affairs, InfoCision Management Corp.  
**Kent Charugundla**, Owner, EagleNet Group  
**Citrix Systems, Inc.**  
**Convergys Corp.**  
**Dominic Dato**, Founder and CEO, Teleperformance USA  
**Jack Early**, Founder, Early, Cloud & Co.  
**James D. Foy**, President, Chief Executive Officer and Director, Aspect Software  
**FrontRange Solutions**  
**Ray Golden**, Senior VP, Blended Solutions, InPulse Response Group  
**Ray Hansell**, Chairman, MaraStar Communications  
**Sheri Idelman**, Vice Chair, Chief Operating Officer, Co-founder, Solutionary, Inc.  
**Steve Idelman**, Chairman of the Board, CEO, Co-founder, Solutionary, Inc.  
**Charles Judd**, CEO, NTS Marketing, Inc.  
**Kathleen Kelly**, President and Chief Executive Officer, TeleDirect International Inc.  
**Debbie May**, President, General Manager, IEX Corp.  
**Joe Porfeli**, Chairman, Chief Executive Officer, Spencer Trask Software & Information Technology Group  
**Robin D. Richards**, The NTI Group, Inc. (NTI)  
**Thomas M. Rocca**, President, KPI Group, LLC  
**Hayley J. Savage**, Senior Vice President, Sales And Marketing, Influent, Inc.  
**Theodore G. Schwartz**, Founder and Chairman, APAC Customer Services, Inc.  
**Tim Searcy**, CEO, American Teleservices Association (ATA)  
**Douglas W. Smith**, Senior Vice President, Sales And Marketing, SER Solutions, Inc.  
**Joseph A. Staples**, Senior Vice President, Worldwide Marketing, Interactive Intelligence  
**Albert Subbloie**, President and CEO, Founder, Tangoe Inc.  
**Aleksander Szlam**, Chairman & CEO, Szlam Enterprises, Inc.  
**Gary L. Taylor**, Chairman of the Board, InfoCision Management Corp.  
**Brent Welch**, Chief Operating Officer, Worldwide Operations, Teleperformance USA  
**West Corporation**  
**Witness Systems**

May 4, 2006

Looking back, the last 25 years have been the best and most rewarding part of my career! It was definitely worth it. It was a dream ride, and if I had to do it all over again...I would do everything exactly the same way.

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

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For information and subscriptions, visit <http://www.TMCnet.com> or call 203-852-6800.

## Congratulations To The 2006 CRM Excellence Awards Winners, Part II

For the seventh consecutive year, the editors of *Customer Inter@ction Solutions* dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. In this issue, we present Part Two of our coverage (Part I was presented in May 2006). I offer my congratulations to the winners!



### IMPORTANT:

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

Subscribe FREE online at <http://www.cismag.com>

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## SPECIAL FOCUS

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*Customer Inter@ction Solutions magazine, in the spirit of celebrating our 25th Anniversary, has been proud to designate a special group of individuals and companies as recipients of our "Lifetime Achievement Award." In this issue, we present the second part of the Lifetime Achievement Award winners. (Part One appeared in our May 2006 issue.)*

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### 42 The Call Center And Teleservices Event Of The Year Celebrates The Last Quarter Century

*Most industries have their big event nights...their "Academy Awards" for industry luminaries. On May 4th, TMC and Customer Inter@ction Solutions magazine had the pleasure of hosting a black-tie, red-carpet awards event that paid tribute to a group of the brightest and best knowlegends of the call center and teleservices industries in addition to celebrating 25 years of call center industry leadership by Customer Inter@ction Solutions magazine.*



### 50 Highlights Of The Customer Inter@ction Solutions' 25th Anniversary Event

*During the special night of May 4, 2006, at Customer Inter@ction Solutions' 25th anniversary celebration, the honorees of the Lifetime*

*Achievement Awards offered many wonderful comments about their experiences in the industry. Here, we've reproduced the highlights of the evening's acceptance speeches. Congratulations to all the winners.*

## CUSTOMER RELATIONSHIP MANAGEMENT

### 54 The Seventh Annual CRM Excellence Awards, Part II

*For the seventh consecutive year, the editors of Customer Inter@ction Solutions dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. In this issue is Part Two of the winners list — the companies that offer the best and the brightest customer relationship management products and services, all to the benefit of their clients. (Part One of the list was presented in the May 2006 issue.)*

## INNOVATIVE SOLUTIONS FROM THE EXPERTS

*Major Trends Facing The Contact Center From The Workforce Optimization Experts A Special Editorial Series Sponsored by Voice Print, Pipkins and Syntora*

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## CONTACT CENTER TECHNOLOGIES

### 66 Twenty-Five Years Of Call Center Innovations: A Retrospective

*When we began discussing this special 25th anniversary issue of Customer Inter@ction Solutions magazine, we knew we needed a retrospective: a sort of historical technological overview of this great industry, written by those individuals most closely involved with the development of the technologies that have made the call center industry what it is today. We turned to Aspect Software.*





**Ben Dixon**

**Managing Director, LBM**

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By Melanie Stoll, Adobe Systems

*The primary culprits in the customer service crisis are overly complex and insufficient agent training. Agents must cope with a wide, ever-changing variety of technical products as well as incredibly complex systems that manage customer data. Nowadays, it takes longer to get things done, especially if agents have not received adequate training on navigation of the call center's systems.*

### 80 Things to Consider When Buying A Workforce Management Solution

By Bill Durr, Principal Solutions Consultant, Witness Systems, Inc.

*As the role of the contact center within the enterprise continues to expand, workforce management (WFM) has emerged as one cornerstone in an overall optimization strategy. As a result, WFM solutions and other contact center software applications are undergoing unprecedented and accelerated changes. This leaves administrators with the challenge of finding the right blends of technologies to meet the specific needs of their organizations.*

## TMCNET.COM ONLINE EXCLUSIVES



### Don't Allow Technology to Dictate Staffing Strategy

By Randy Saunders, Marketing Director, Cincom

*Rather than allow technology to dictate staffing strategy, technology can be used to take the channel conundrum out of the staffing equation. A coordinated, single-desktop view enables agents to handle multiple contact channels with the same proficiency, because customer data and resolution tools are presented in the same, familiar interface.*

Read the full article at <http://www.tmcnet.com/302.1>

### Speech Analytics: The Three Essential Elements

By Daniel Ziv, Director of Business Analytics, Verint Systems

*By applying advanced speech recognition technology to spoken conversations, speech analytics solutions reveal critical insights that would not otherwise be apparent. And by measuring not just contact center performance, but all of the back-office processes and other customer touch points that shape customer perceptions, speech analytics extend the benefits of contact center recording from workforce quality to enterprise-wide customer process optimization.*

Read the full article at <http://www.tmcnet.com/303.1>

### Customer Satisfaction Index Measures Quality Of Economic Output

By Al Bredenberg, Editorial Director, TMCnet

*I recently reported on the release of the American Customer Satisfaction Index (ACSI) for the first quarter of 2006, which found that customer satisfaction that quarter registered its largest increase since 2003. I was curious about the rationale behind the index and its potential role as an economic indicator, so I arranged an interview with University of Michigan Professor, Claes Fornell, head of ACSI and director of the National Quality Research Center. Following are his comments to me in question-and-answer format.*

Read the full article at <http://www.tmcnet.com/304.1>

### Regulatory Compliance Now Impacts Customer Support Industry

By Fred Pack, UniPress Software

*As if today's support managers don't already have enough on their plates, they're now being asked to comply with various government regulations, including the Sarbanes Oxley Act (SOX), American Health Insurance Portability and Accountability Act of 1996 (HIPAA) and others.*

Read the full article at <http://www.tmcnet.com/305.1>

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

# Call Centers Are Changing Lives

I grew up in the call center business, and couldn't be more proud of that fact. Over the years, call centers have been used for admirable activities such as coordinating life-saving organ transplants, blood drives and fundraising for virtually all the top charities. More recently, call centers have been responsible for adding jobs to regions of the country and world where jobs were once scarce. This industry has given hope to millions — many of whom could not find work or were not able to work in other areas. Call center jobs provide stability and benefits such as health insurance to people who would otherwise not have those necessities.

Millions of jobs are attributable to call centers around the world. Ironically, many people in the industry told me, in the late 90s, that the Internet would wipe out the call center business. This was considered "conventional wisdom" at the time. It was not only wrong, but we found that the exact opposite happened. Sure, in many cases, Web sites take the place of call centers, but here we are, a decade after the leading edge of the Internet boom, and call centers have continued to explode with growth worldwide.

I thought I was aware of all the ways call centers could do good work for

call center training center supported by the Military Order of the Purple Heart.

I had to learn more. As I peeled away the layers, I found that beyond human interest, there is a great call center story — one that could change much of the common wisdom of the conventional U.S. call center industry.

## How It Got Started

In November of 2005, the Military Order of the Purple Heart Service Foundation (MOPHSF) started its first class of 15 disabled, combat-wounded veterans in an online call center training program called Veterans Business Training Center, or VBTC.

The training was 15 weeks, 600-hours long and focused on the Five9 (<http://www.five9.com>) dialing platform. As it turns out, [Five9 \(news - alert\)](#) gave MOPHSF very favorable rates for their service and should be commended for doing so.

The foundation allowed the trainees to use this platform to call prospect donors on behalf of the foundation to solicit contributions in the state of Virginia. The program was a huge suc-

**Millions of jobs are attributable to call centers around the world.**

humanity, but recently I learned about a new one, and I thought it was worth sharing. I received an e-mail from Ken Smith, Program Manager of the new





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IEX, the leader in workforce management, thanks Technology Marketing Corporation for selecting IEX President and co-founder Debbie May for a lifetime achievement award in the contact center community. The IEX family congratulates Debbie and thanks TMC for recognizing what we have known all along: IEX and its leadership are world class.

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cess. It has now expanded into 25 states, and the VBTC is accepting applications online at its Web site at

[http://www.purpleheartfoundation.org/job\\_training.asp](http://www.purpleheartfoundation.org/job_training.asp) (you can access this site easily via <http://www.tmcnet.com/308.1>).

Ken forwarded me a press release (you can view it at <http://www.tmcnet.com/306.1>) that was issued late last year about this program, and it includes some interesting details. For example, there are now over 221,000 veterans who have been deemed unemployable by the VA. In the same release, Senator Larry Craig (R-Idaho), who chairs the Veterans' Affairs Committee, had the following to say:

"It was just a few weeks ago that my committee held a hearing concerning the dramatic increase in the number of veterans deemed unemployable by the U.S. Department of Veterans Affairs. I'm pleased that the Military Order of the Purple Heart Service Foundation has stepped up quickly to help veterans with disabilities get the training and support they need to reenter the workforce. I am sensitive that many veterans deemed unemployable may never return to the workforce. But I believe that there are some, perhaps thousands, who could be helped emotionally and financially by working, and this program is an important step in that direction."

The Purple Heart Foundation's new initiative is called the "Business Training Center," and will provide remote and virtual in-home national training in the near future. The 15-week program will provide 600 hours of training for positions in the information industry.

The idea then was to find a local college to work with over the training. The program is located in Annandale Virginia, so Smith approached and had positive conversations with a large community college called Northern Virginia Community College, or NVCC (<http://www.novatrain.net>).

NVCC accredited the course syllabus,

## There are 225,000 qualified disabled veterans who are receiving services from the Veterans' Administration today.

and this allows the foundation to have veterans use their educational benefits to attend the training. Furthermore, the Veterans Administration can reimburse the costs of this training. The foundation pays trainees \$11 per hour while in training, and the total costs of training, including this stipend, are \$8,700.

This autumn, NVCC will be offering a 300-hour module that will train a disabled veteran in ways to start, operate and manage a 15 to 30 seat call center. It will assist these veterans in gaining the required recognition that is needed to compete for government contracts under the Disabled Veteran Affirmative Action Plan, or DVAAP (<http://www.opm.gov/veterans/dvaap.asp>). (You can access this site easily via <http://www.tmcnet.com/308.1>).

The Disabled Veteran Affirmative Action Plan requires the federal government to award three percent of all federal contracts to disabled veterans. With the U.S. government doing \$2 trillion per year in contracting, the foundation estimates that there are 60 billion dollars' worth of DVAAP contracts available.

The point is that, since so many disabled veterans were once deemed unemployable, it was impossible to hit this three percent mandate. However, since disabled veterans can now work remotely from their homes, many more of them will become employable. Some disabled veterans will be able to start companies that hire other disabled veterans, and these workers will be in an excellent position to find work, since the DVAAP dictates they must be hired if they are able and willing.

In addition, the foundation is in communication with FEMA (125 seat virtual call center), the Department of the Treasury (325 seat call center), the Department of Veterans' Affairs (75 seat call center), HUD (50 seat call center), DOL (100 seat call center), Halliburton

Corporation, Home Depot, FEDEX, UPS and a host of second- and third-tier companies in which to place veterans.

### Veteran Computer Hospital

Imagine a disabled veteran trained on the use of the Five9 predictive dialer. Then imagine that same vet trained on Citrix. He or she could use a computer to remotely help other veterans with simple computer issues. The foundation envisions this concept to begin with a simple "Emergency Room" visit to the foundation's Web site to request help with a host of issues. Using another anticipated partner, XoftspySE, they would be able to run a simple diagnostic that removes malware, spyware and browser hijacking files, and perform this feature from the at-home agents' desks. At the same time, other "tier 2" trained agents would handle the more challenging cases and conduct training online to those individuals who wish to progress, all the while offering this service to the city, county, state and federal government, all under the DVAAP umbrella.

The veterans who participate are men and women and range in age from 25 to 65. They encompass different wars and all branches of military service. Many veterans have bilingual skills, and bring, as a very important skill, their command of English and their understanding of the geography of the United States. Because of these factors, they can aggressively compete for the business that is currently being offshored.

There are 225,000 qualified disabled veterans who are receiving services from the Veterans' Administration today. The plan is to reach upwards of 10 percent of those potential workers and to train them in call center technologies.

One last point is that there is a tremendous incentive for any company





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fDi Magazine, Financial Times



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Michael J. Riek, President, HDN  
(Help Desk Now)





who hires a wounded veteran. Currently, there is a tax credit of up to \$7,500 per wounded veteran hired. Apparently, there is a complex formula needed to figure out exactly what this credit is.

Here is part of the last e-mail that Ken sent me on the matter. It speaks for itself,

so I thought I would pass it along as is:

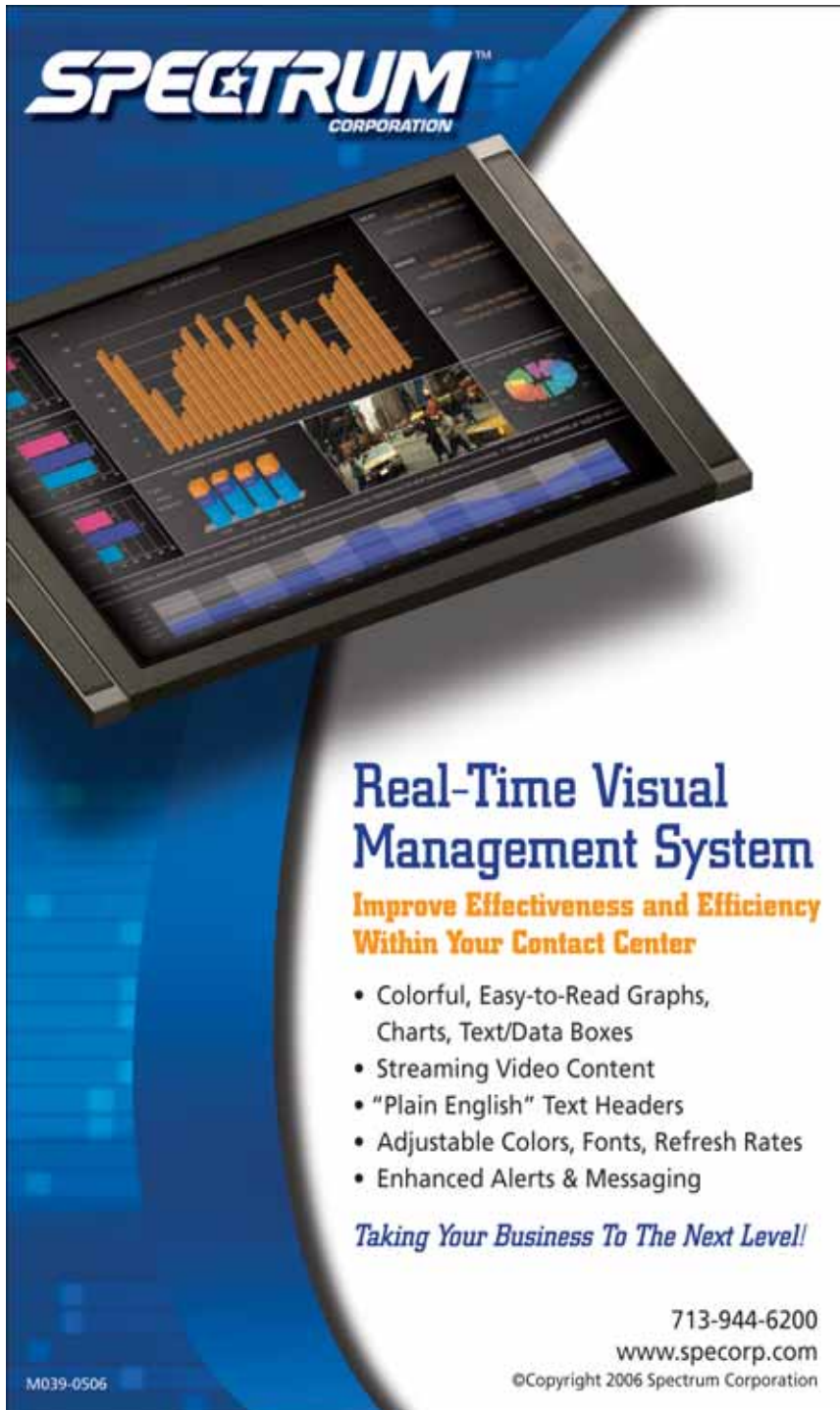
"We are asking the staff of Senator Craig (Chairman of the Senate Veterans Affairs' committee), and the staff of Congressman Steve Buyer (Chairman of the House Veterans Affairs' committee) to clarify the

process, and for those veterans who are 100 percent service-connected disabled, (they are currently receiving \$26,000 per year, tax free), we are asking that this group be awarded a tax credit of \$12,500 per veteran (placing them on a level playing field with the Philippines, India, etc.) — reducing by half the exposure that the government is currently paying. Also keeping that tax credit in place indefinitely, assuring that the company hiring the veteran has an incentive to keep him/her long term."

Mostly everyone is rooting for us to do well, and while we are rookies in this game, we are quick learners, and have approached the problems we are facing from an 'operations planning' point of view. We have 'lessons learned' from things we did wrong, and would be willing to discuss our strategy with anyone who reads your article.

Please include e-mail address [ksmith@purpleheartfoundation.org](mailto:ksmith@purpleheartfoundation.org) and the phone number 703-340-8763 in your article, in case someone is interested in hiring some disabled vets, or wants to have a special class trained (up to 100 at a time can be trained)."

In closing, I must say I am as proud as I have ever been to be part of an industry bringing jobs to those who were thought to be unemployable. In addition, I think what Ken and his team is doing is fantastic for the call center industry, disabled veterans and the corporations who hire these vets. In the long run, I hope there is some certification a company can proudly display if a certain percentage of their workers are made up of disabled veterans (and perhaps other groups, as well). This emblem could be a sign of a compassionate company doing good for their country and humanity. In the end, of course, companies primarily focus on profit, but if we can find ways to incent companies to not only be profitable but to give back to society, we have a true win/win formula on our hands. **CIS**



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#### Stratasoft, Inc.



#### Strategic Contact Solutions, Inc.



#### Telephony@Work



#### Verint Systems



#### VoiceLog LLC



#### Witness Systems





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InfoCision Management Corporation



Advanced Data-Comm, Inc.



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



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

## NICE Acquires IEX And Performix

**NICE Systems** ([news](#) - [alert](#)) recently announced that it has signed a definitive agreement to acquire **IEX**, a provider of contact center workforce management solutions. The company also signed a second definitive agreement to acquire **Performix Technologies**, ([news](#) - [alert](#)) which offers contact center performance management solutions. The transactions are subject to the satisfaction of customary closing conditions and are anticipated to close towards the end of the second or the beginning of the third quarter of 2006. Under the agreement, NICE will acquire the shares of IEX, a wholly owned subsidiary of **Tekelec**, ([news](#) - [alert](#)) for approximately \$200 million in cash. NICE will acquire Performix for a total purchase price of \$13.2 million in cash. The Performix purchase price may be increased by up to an additional \$6.15 million based on certain performance criteria. The combined solution formed by NICE Perform and the offerings of IEX and Performix will constitute a paradigm shift in how contact center management and enterprise executives make decisions, monitor and improve performance, according to NICE. By combining all this critical business information with insight generated by interaction analytics, analyzing it and providing reporting and state-of-the-art dashboards, contact center and enterprise decision makers can gain far-reaching and valuable operational and business insights on strategic business issues, such as upselling and cross-selling, customer churn, business intelligence, compliance and fraud, and others.  
<http://www.nice.com>



## etalk Unveils Customer Survey Solution

**etalk**, ([news](#) - [alert](#)) a provider of contact center software and services, has announced that Qfiniti Survey, an automated customer survey application, is now fully integrated onto etalk's single platform of call center solutions, Qfiniti Enterprise. In addition to customer

surveys, Qfiniti Enterprise delivers a suite of contact center solutions for quality monitoring, agent coaching and evaluation and advanced speech analytics — all in a single interface. Qfiniti Survey provides a direct link between customer satisfaction scores and agent performance within the call center by recording both the agent/customer interaction and the subsequent customer input via IVR, and then linking those recordings to the evaluation process. Qfiniti Survey establishes this direct link between the performance of a contact center and the customer satisfaction that drives the business. Now with additional functionality that allows greater analysis of customer responses, Qfiniti Survey is, according to etalk, more advanced than the company's previous survey tools.  
<http://www.etalk.com>

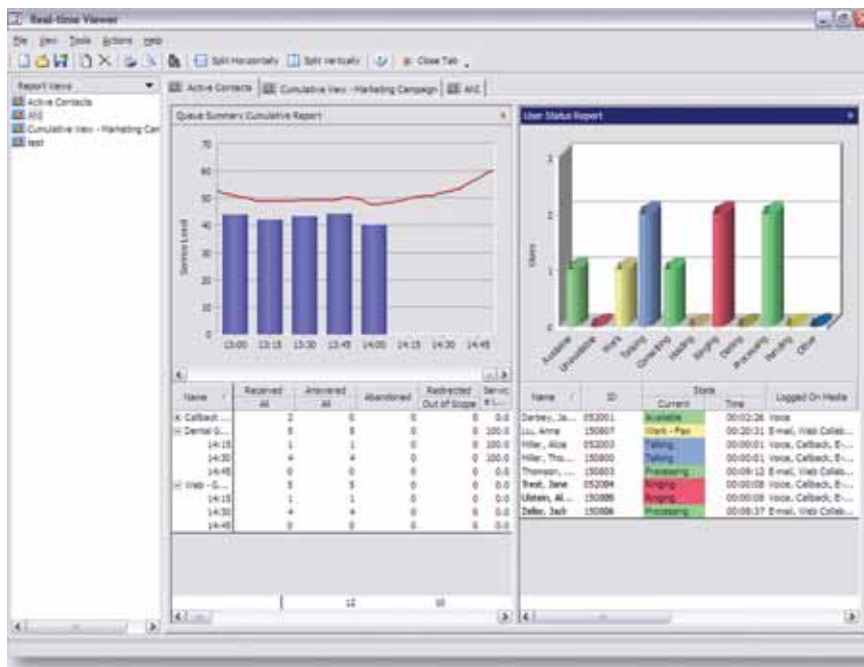


## Siemens Communications Inc. Announces HiPath ProCenter Enterprise Version 7.0

**Siemens Communications Inc.** ([news - alert](#)) recently announced the launch of HiPath ProCenter Enterprise Version 7.0, the company's new IP-ready contact center solution designed to help enterprises improve first-contact resolution, drive up productivity and increase customer satisfaction. The solution includes pre-built integrations with front-office CRM applications from Microsoft, SAP and Siebel Systems. The Siemens HiPath ProCenter Enterprise solution helps enterprises improve the efficiencies of multiple customer interaction channels — including voice, e-mail and live Web interactions — with Siemens' presence and collaboration tools. With presence-driven applications, front-line agents can get real-time information about the availability of subject matter experts and connect to them across various media types throughout the enterprise.

Newly enhanced HiPath ProCenter Enterprise capabilities include: extension of the HiPath ProCenter Design Center, a visual workflow-style desktop productivity tool; modular options to help meet the needs of specific contact centers and the ability to add features and scalability as needs change; Siemens HiPath 8000 IP-telephony platform integration for high-end, session initiation protocol (SIP) contact center functionality; automated upgrade path for enterprises growing from the HiPath ProCenter Agile solution for small and medium-sized contact centers; and multimedia presence and collaboration tools.

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### Aspect Software Offers Open Source IP-PBX

Aspect Software, Inc. ([news](#) - [alert](#)) recently announced it will provide and support the Digium open-source Internet protocol (IP) PBX, the Asterisk Business Edition — a professional-grade version of the industry's first open source IP-PBX — for customers of its Unified and Signature product lines. The Aspect Software packaged offering includes the Asterisk Business Edition license; SIP phones (optional); application servers and IP gateways (optional); interoperability with Aspect contact center products; installation and deployment of the solution; and post-deployment support. The increased adoption of session initiation protocol (SIP) and standards-based technology points to open source as an increasingly viable option. The early adopters of this technology have been drawn by the low cost, as well as the greater control and flexibility that open-source telephony offers to companies.

The Asterisk Business Edition IP-PBX provides tested reliability of critical functions and features and includes support and full documentation. Based on the Asterisk open-source PBX, the product offers companies the same call handling capabilities expected of closed PBX systems, at a substantially reduced cost, including features such as switched or packet data and voice mail.

<http://www.aspect.com>

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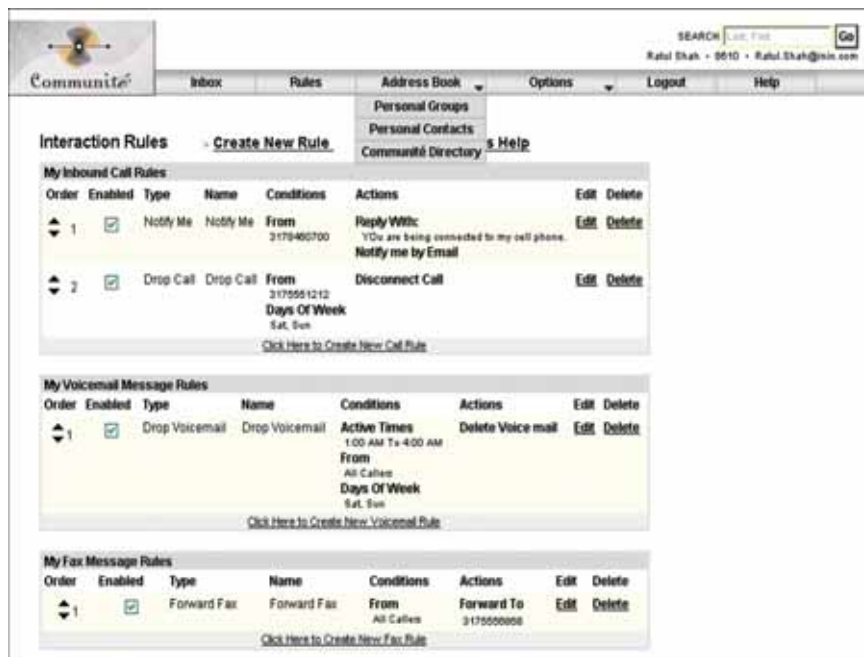
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## Interactive Intelligence Launches Channel-Ready Program For Unified Communications System

**Interactive Intelligence Inc.** ([news](#) - [alert](#)) has announced the launch of a channel-ready program designed to simplify installation of the company's unified communications system, **Communité**. The Interactive Intelligence channel-ready program offers resellers and direct customers single-SKU/single-price ordering, port-based sizing options and a complete, pre-packaged system. The system combines Communité's voice over IP-ready software, with Windows 2003 servers powered by Intel Xeon processors, Intel Netstructure Host Media Processing (HMP) software and Intel Netstructure PBX-IP media gateways for PBX connectivity. The system also includes integrated back-up and recovery tools, a recovery DVD, and change management controls.

Communité offers standards-based voice mail, unified messaging and real-time communications services, including multimodal message access by phone, desktop, Web browser or PDA device, presence management, find-me/follow-me functions, auto-attendant, conferencing and faxing. Communité integrates with traditional PBX and IP-based communications systems, and can be deployed as a voice mail replacement system operating independent of existing LDAP and e-mail systems. This enables organizations to deploy Communité for voice mail replacement initially, and migrate users to unified messaging and real-time communications as needed.

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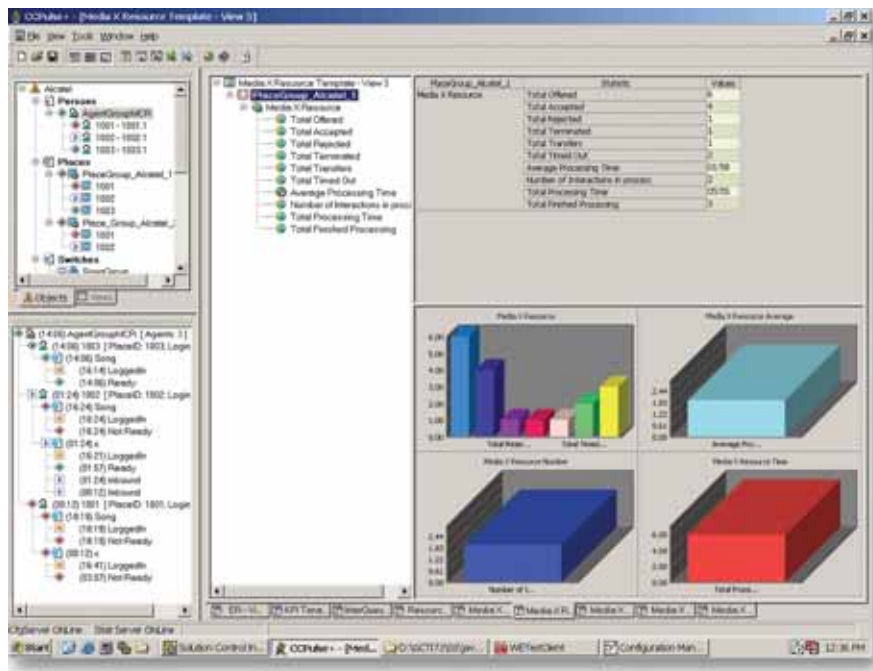
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## Genesys Releases Contact Center Suite Version 7.2

Genesys Telecommunications Laboratories, Inc., ([news - alert](#)) an Alcatel company, has released Genesys 7.2, a new version of the company's contact center software suite with advances in the scalability, reliability and security needed for IP contact centers. By leveraging Open IP and SIP (Session Initiation Protocol) technology, Genesys 7.2 can support up to 30,000 agents and provide contact centers with new forms of customer interactions, intelligent routing and call controls, and software-based ACD capabilities. According to the company, Genesys 7.2 is the only IP contact center solution that uses a completely open architecture to support virtually any hardware or software platform, regardless of vendor. This Open IP architecture allows businesses to integrate "best-of-breed" components without complex compatibility issues, giving companies total choice in selecting the most appropriate infrastructure to meet their business goals. Genesys 7.2 also supports a mix of IP and TDM environments as well as hybrid environments that require multi-vendor platforms. Unlike "rip and replace" architectures of the past, these approaches allow businesses to migrate to an IP environment over time, spreading out costs and minimizing risk. Genesys 7.2 integrates IP into key elements of the suite, such as the Genesys Voice Platform (GVP-IP) to support voice self-service, video and voice-enabled applications. The Open Media module lets businesses apply advanced routing capabilities and business process-based routing to virtually any customer application, including Web, fax, SMS, e-mail, chat, video or workflow management.

<http://www.genesyslab.com>



## Salesforce.com Purchases Sendia

On-demand CRM provider [Salesforce.com, inc.](#) ([news - alert](#)) has announced the next generation of mobile applications with AppExchange Mobile through its acquisition of **Sendia Corporation** for \$15 million in cash. The combination of the AppExchange on-demand platform with mobile technology from Sendia will mobile-enable more than 60 on-demand applications that are currently available on the AppExchange. Using AppExchange Mobile, all current and future AppExchange partners will be able to quickly and easily extend their on-demand applications to any mobile device with no extra development cost or complexity. AppExchange Mobile breaks the wireless application logjam for customers and reduces challenges associated with developing mobile applications, the need to develop for multiple platforms, and the cost and complexity of developing and deploying mobile applications. Today, ISVs and developers have to develop applications across multiple platforms and multiple operating systems for use with multiple carriers, causing extended development, testing and QA cycles. AppExchange Mobile provides developers with a new model: Now, developers can write an application once on the AppExchange on-demand platform and have it run on any mobile device, as well as any Web-enabled PC, without additional coding. Sendia President and COO Alex Klyce has been named senior VP and general manager of the AppExchange Mobile Business Unit for salesforce.com.

<http://www.salesforce.com>

### New Version of KANA IQ Available

**KANA Software, Inc.**, ([news](#) - [alert](#)) a provider of multichannel customer service, has announced enhancements to KANA IQ, the company's solution for enterprise knowledge management and customer service optimization. KANA IQ 9.1 features new workflow capabilities for managing the process of translating and maintaining knowledge-base content in multiple languages. The software also offers new knowledge base revision management capabilities — a feature of particular importance to any government-regulated industry. The new enhancements enable organizations to arm agents with the most current knowledge to provide individualized customer service without incurring more cost. KANA IQ delivers a guided knowledge approach that reduces the time it takes to answer inquiries. The solution delivers on-demand advice that intelligently guides agents through the process of diagnosing the inquiry and determining the right answer. This enhanced version makes it easier to produce and manage content through efficient workflow processes, providing greater visibility and control over language translation.

<http://www.kana.com>

The screenshot displays the KANA IQ software interface. The main window is titled 'How to Drive on the Surface of the Moon'. It features a 'General' tab and a 'Status' tab. The 'General' tab is active, showing fields for 'Video File URL' (Apollo15-driving.avi), 'Description' (Videos demonstrating use of lunar rover to drive around the moon), 'Reference Name', 'Videos Associated With' (Need Owners' Manual), 'User-Defined Fields', 'Created By' (admin), 'Date and Time' (Monday, January 31, 2006 6:18:22 PM), 'Modified By' (deleted - file "Homeltheater \$ 1"), 'Date and Time' (Tuesday, March 15, 2006 2:41:14 AM), 'Start Date and Time', 'Expiration Date and Time', and 'Work Stages to which Object is Assigned'. The 'Status' tab is also visible, showing fields for 'File URL', 'Description', 'Reference Name', 'Associated With', 'Defined Fields', 'Created By', 'Date and Time', 'Modified By', 'Date and Time', 'Expiration Date and Time', and 'Stages to which Object is Assigned'. The 'Flow History' section is at the bottom.

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for 25 years of outstanding, informative and visionary editorial that built the foundation for the multibillion-dollar call center & CRM industry.

We would also like to congratulate Dominic Dato & Brent Welch for their much deserved Lifetime Achievement Awards



Nadji Tehrani & Teleperformance CEO Dominic Dato



Nadji Tehrani & Teleperformance COO Brent Welch



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# Lifetime Achievement Awards

## For The Call Center Industry



*Customer Inter@ction Solutions* magazine, in the spirit of celebrating our 25th Anniversary, has been proud to designate a special group of individuals and companies as recipients of our "Lifetime Achievement Award." Most of these individuals and companies have ties to the call center industry going back decades. They were judged to have made some of the most substantial innovations dedicated to advancing the success and reputation of today's call center industry. Without these special people and companies, the industry would not be half as successful as it is today. In this issue, we bring you Part Two of the tributes to those individuals and companies to whom we presented Lifetime Achievement Awards at our gala celebration in New York City on May 4, 2006.

### Edward Blank Edward Blank Associates, Inc.

Edward Blank ([news](#) - [alert](#)) is a pioneer in outbound telemarketing. His company, Edward Blank Associates, Inc., was founded in New York in 1970. It became a Top 10 firm, selling products and services from 13 call centers in the U.S. and Canada. Clients included Weekly Reader children's books, AT&T and FirstUSA. His firm was noted for stringent quality control standards, cutting-edge technology and innovative sales techniques. He began his career in survey research after graduating from City College of New York (CCNY). He also did graduate work at the New York University Graduate School of Business. He subsequently worked for leading marketing research organizations and Litton Industries. He is a past member of both the American Teleservices Association (ATA) and the Direct Marketing Association (DMA), and is currently a member of the board of Authtel. He is the UN representative for the Jewish National Fund. He is also active in various American and Israeli philanthropic organizations.

### Charles Judd CEO NTS Marketing, Inc.

Charles Judd is CEO of NTS Marketing, Inc., ([news](#) - [alert](#)) a full-service call center agency offering inbound and fulfillment. Before starting NTS in 1989 with his son Christopher, Judd designed and implemented direct response fund raising strategies for a number of national member/donor organizations. He was Deputy Director of the Republican National Finance Committee from 1979 to 1980. He teaches fund raising techniques for political candidates, the RNC Campaign Management Workshops, the Campaign Management College, the Concord Conference, the *Campaigns & Elections* Magazine Training Seminars, and GOPAC. During his previous political career, Judd served as the Executive Director of the Ohio Republican Party; City Council Member and Vice-Mayor of Fairfield, Ohio; and Republican candidate for Congress from the 6th District of Virginia.

### Kathleen Kelly President and Chief Executive Officer TeleDirect International Inc.

Kathleen Kelly is a 20-year veteran of the communications industry and one of the earliest proponents of Open Communications Systems. She has grown TeleDirect ([news](#) - [alert](#)) from a small, local Iowa operation to an internationally recognized company and an award-winning leader in Open Communications Systems. She is a member of the American Teleservices Association (ATA) Technology Committee, a member of the Board of Directors of the Arizona chapter of the ATA and a member of the Direct Marketing Association (DMA) Teleservices Council.

### Debbie May President, General Manager IEX Corp.

([news](#) - [alert](#)) Debbie May is one of the founders of IEX. As President and General Manager, she is responsible for all aspects of the contact center business. Prior to joining IEX, she developed data communications software at Texas Instruments. She has developed and managed PBX and ACD call processing and management information systems as well as workforce management and call routing systems. Under May's leadership, IEX has experienced rapid growth and has been profitable every quarter since inception. May and her team earned the Pacific Bell Quality Partner award for six consecutive years.





**Joe Porfeli**  
**Chairman, Chief Executive Officer**  
**Spencer Trask Software and**  
**Information Technology Group**

(news - alert) Joe Porfeli brings more than 30 years of executive experience in the high-tech sector to the DesignAdvance board. He has led TechRx's evolution from a high-volume pharmacy software provider into an industry leader in retail pharmacy management technology. Porfeli served as President and Executive VP of Sales and Marketing of TechRx until he orchestrated the purchase to NDCHealth in 2002. Prior to TechRx, Porfeli served as Chairman, President and CEO of REVIVE Technologies Inc., a provider of legacy database and software system conversion services and automated tools. He served in the same capacity with EIS International, a telecommunications hardware and software company, which grew to more than \$90 million in annual revenue under his leadership.

**Robin D. Richards**  
**The NTI Group, Inc. (NTI)**

Robin Richards leads The NTI Group, Inc. (NTI) (news - alert) as an entrepreneur and visionary strategist, fueling the company's meteoric rise to prominence as the number-one provider of hosted, time-based mass notification services focused upon assisting government leaders to communicate quickly and efficiently with their constituents. Prior to forming NTI, Richards served as CEO of Vivendi Universal Net USA, an entity created in the fall of 2001 to oversee the U.S. Internet-related companies owned by Vivendi Universal. In this role, Richards oversaw all aspects of six interrelated entities. He was the founding President and Chief Operating Officer of MP3.com, Inc., the Internet's first and preeminent digital music provider. Previous to MP3.com, Richards served as Managing Director of Tickets.com, Inc., an Internet ticketing service company. As the Founder, President and CEO of Lexi International, Richards brought the

company to its ranking as the largest teleservices and database management company in the U.S. by 1991. Lexi International earned the rare distinction of appearing on two consecutive *Inc.* "500 Fastest Growing Companies" listings, and he successfully sold Lexi to Thayer Capital.

**Thomas M. Rocca**  
**President**  
**KPI Group, LLC**

(news - alert) Tom Rocca is president of KPI Group, headquartered in Atlanta. Tom has over 25 years in customer service and sales technology re-engineering for call centers. He keeps a continual focus on "staying compliant" on all federal and state call center rulings. Rocca, with KPI Group, provides outsource partner selection; RFP development and management; technology selection and contract negotiation; call center auditing, best practices and sales process flow analysis; sales and service performance enhancement (KPIs); and federal, state and insurance compliance management. Rocca has been an active member of the American Teleservices Association (ATA) since 1987 and currently serves as a past chairman and sits on the national board of directors.

**Hayley J. Savage**  
**Senior Vice President,**  
**Sales And Marketing**  
**Influent, Inc.**

(news - alert) Hayley has been a leader in the direct marketing industry for over 24 years, having begun her career as Production Supervisor for American Family Publishers, a division of Time, Inc. She went on to a position with CBS/Columbia House, where she was responsible for the domestic and Canadian production requirements associated with membership acquisition for their various continuity music clubs. Recruited by what was then the nation's sixth largest direct marketing agency, The Direct Marketing Group, Hayley became the company's youngest-ever Vice President. In 1991, Hayley joined

APAC Customer Services as VP of Sales, where she had responsibility for identifying, developing and generating new client opportunities as well as existing client growth. She delivered multimillion dollar contracts for customer acquisition, customer care, e-commerce and ASP applications.

**Theodore G. Schwartz**  
**Founder and Chairman**  
**APAC Customer Services, Inc.**

In 1973, Ted Schwartz founded APAC, (news - alert) a company he built from a one-person operation to a company with a leadership position in the customer services outsourcing arena and employing over 7,000 people. Schwartz, one of the founders of the industry, has received the prestigious Pioneer Award and has been inducted into the ATA Hall of Fame, as well as the Call Center Solutions Hall of Fame. He has received the University of Illinois Entrepreneur Hall of Fame Award and the Illinois High Tech Entrepreneur Award. As an active industry voice, his opinions have been sought by numerous national publications and industry journals.

**Tim Searcy**  
**CEO**  
**American Teleservices**  
**Association (ATA)**

(news - alert) Tim Searcy has had the privilege of serving as a senior executive in the largest and fastest-growing direct marketing companies in the world, including West Teleservices, APAC Teleservices, Transcom Worldwide and Rapp Collins. With sales and CEO responsibilities combined, Tim has been responsible for development of over \$2 billion in outsourced teleservices and direct marketing solutions worldwide. Currently, Searcy serves as the CEO of the American Teleservices Association (ATA). As legislators turn their focus from the outbound sales component of our business, Searcy fights to preserve the operational freedom of inbound practices from overregulation.

**Douglas W. Smith**  
**Senior Vice President, Sales And Marketing**  
**SER Solutions, Inc.**

Doug Smith brings over 35 years of operational and sales management experience to his position of Senior VP, Sales And Marketing, at [SER Solutions, Inc.](#) ([news](#) - [alert](#)) Smith is responsible for setting the company's direct and indirect sales and growth strategy, and ensuring revenue attainment across North America, Europe and Asia-Pacific. Additionally, Smith oversees SER's corporate marketing programs to ensure the company's position as a leader within the marketplace. Previously, Smith served as a management consultant specializing in strategic sales and go-to-market initiatives within the contact center marketplace. Prior to his work as a consultant, Smith held executive positions at Davox Corporation, where he oversaw both direct and indirect sales channels worldwide.

**Joseph A. Staples**  
**Senior Vice President,**  
**Worldwide Marketing**  
**Interactive Intelligence**

([news](#) - [alert](#)) Joseph A. Staples serves as senior VP of worldwide marketing for Interactive Intelligence. He oversees the global marketing efforts of the company's contact center and communication product lines. Staples brings 24 years of experience in technology and marketing to Interactive Intelligence, including specific assignments in the areas of computer telephony, unified messaging, mobile wireless, computer networking and computer-based education. Prior to joining Interactive Intelligence, Staples was the principal of FirstLight Marketing, a successful marketing services company. For the six preceding years, he was Executive VP of Corporate Marketing at Captaris, Inc., a provider of business communication solutions. Previously, Staples was the VP of marketing for Callware Technologies, Inc., a provider of unified messaging software. Prior to his employment at CallWare,

Staples spent five years with networking leader Novell Inc. in several management positions. While at Novell, he was credited with playing a central role in developing the early stages of the computer telephony industry, including the launch and evangelism of TSAPI, a broadly adopted CTI development platform.

**Albert Subbloie**  
**President and CEO, Founder**  
**Tangoe Inc.**

([news](#) - [alert](#)) Recognized as a telecommunications technology and Internet pioneer, Al Subbloie brings a visionary approach to Tangoe. In 1984, after leaving Andersen Consulting, Subbloie co-founded and served as CEO of Information Management Associates (IMA). He was among the first to develop and market both call center voice and data solutions for integrated sales, marketing, telemarketing and customer service activities. In 1997, Al co-founded Buyersedge.com, an Internet company in the field of reverse auction. Al is credited with one of the patents for reverse auction theory, the Internet paradigm in most shopping sites today. Subbloie also founded Freefire, a Web-enabled eCRM customer interaction software supporting e-mail response, chat and remote telephony in an ASP model involving complex data distribution requirements. Subbloie served on the board for Acsis, Inc., a provider of RFID device management technology solutions and currently serves on the Board of NYC-based Operative Inc. He has also served as Chairman of the Connecticut Technology Council (CTC) and now serves as a Board member for the CTC.

**Aleksander Szlam**  
**Chairman & CEO**  
**Szlam Enterprises, Inc.**

([news](#) - [alert](#)) Aleksander Szlam is the Chairman and CEO of Szlam Enterprises, Inc., an information technology and contact center services company. Previously, as Chairman of the

Board and CEO of Melita International, Inc. (which he founded and renamed eshare Communications, Inc. in 2000), Szlam took his company from a one-employee business operating out of his garage and evolved it into a publicly traded, profitable and debt-free global leader of intelligent customer interaction management (CIM) solutions. The company's first products, built in Szlam's garage, were an auto dialer and an inbound/outbound call management and notification system. As Szlam completed the "Expedialer" in the summer of 1979, the automated call center industry was born. Szlam was named Inc. Magazine's 1991 Entrepreneur of the Year, Southern Region, while Melita/eshare repeatedly made Atlanta's prestigious "Fast Tech 50" list of growing technology companies. Additionally, in 1996 he co-authored "Predictive Dialing Fundamentals," the definitive guide to the industry's technologies, their applications and usage.

**Gary L. Taylor**  
**Chairman of the Board**  
**InfoCision Management Corp.**

([news](#) - [alert](#)) Gary Taylor received his bachelor's degree in marketing from the University of Akron in 1975. He served as a Graduate Research Assistant in the marketing department while earning his MBA from the University in 1977. He has more than 29 years of experience in direct marketing, fundraising, advertising and the teleservices industry. In 1982, working out of his home, Gary started InfoCision Management Corporation (IMC). Today InfoCision has grown into the third-largest privately held teleservices company in the world. InfoCision's hallmark is its unequalled reputation for quality. IMC won the inaugural MVP Quality Award in 1993 and has been recognized by *Customer Inter@ction Solutions* magazine as the single highest quality teleservices company. InfoCision is the only teleservices company to win an MVP Quality Award every year since 1993, and has won the MVP Gold Award for highest



quality the last seven consecutive years. In 2003, Taylor received the Pioneers Lifetime Achievement Award for the positive impact he has had on the tele-services industry. The University of Akron awarded him the prestigious Simonetti Distinguished Business Alumni Award in recognition of his outstanding business career. In 2005, the ATA bestowed their Pioneer Award on him, and the DMA gave him the Teleservices Excellence Award. Also in 2005, Ernst and Young recognized Gary as an Entrepreneur of the Year award winner, and inducted him into the Entrepreneurs Hall of Fame

**Brent Welch**  
**Chief Operating Officer,**  
**Worldwide Operations**  
**Teleperformance USA**

Brent Welch has 25 years of contact center industry experience. He currently serves as the COO, World Wide Operations, for **Teleperformance USA**, ([news - alert](#)) and leads the operational teams within the company's centers. Welch's extensive experience includes leadership of many of the country's leading contact center service agencies. Welch also founded TeleServices Partners in 1996, one of the premier contact center consulting groups in the country. Prior to that, Welch was President and CEO of ITI Marketing Services (now APAC), and COO of Matrixx Marketing.

**West Corporation**

Founded in January 1986, **West Corporation** ([news - alert](#)) has evolved from an inbound telemarketing service bureau to one of the nation's leading providers of customized contact solutions. Today, many of the nation's Fortune 1000 companies rely on West to help them grow their business through superior inbound, outbound, interactive, Internet, collections and conferencing services. From the beginning, West's inbound solutions have utilized sophisticated call processing centers, which combine the skills of well-trained agents with state-of-the-art

call processing technology. In 1989, West moved into the emerging IVR processing industry and established itself as the recognized leader in the industry. Soon afterwards, West began offering live-operator, outbound tele-services for large-volume sales campaigns. During the late 1990s, West began offering integrated customer care support and full account management to help clients acquire, maintain and grow their customer relationships. In recent years, the company has added advanced speech recognition solutions to its IVR platform and now offers a full range of Internet services, including e-mail management, chat, callback and form-sharing.

**Witness Systems**

**Witness Systems** ([news - alert](#)) is a global provider of workforce optimization software and services that provide

enterprises with unprecedented visibility into customer service processes, workforce performance and customer intelligence. Through its Impact 360 workforce optimization solution, Witness Systems brings together workforce management, quality monitoring, full-time recording, e-learning and performance management under a flexible, scalable framework that provides a single user interface and centralized access to data and reports. [CIS](#)

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# The Call Center And Teleservices Event Of The Year Celebrates The Last Quarter Century

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

Most industries have their big event nights...their "Academy Awards" for industry luminaries. On May 4th, TMC and *Customer Inter@ction Solutions* magazine had the pleasure of hosting a black-tie, red-carpet awards event that paid tribute to a group of the brightest and best known legends of the call center and teleservices industries in addition to celebrating 25 years of call center industry leadership by *Customer Inter@ction Solutions* magazine. The event was attended by over 100 past and present CEOs and top-level management of the most ground-breaking companies in the call center and teleservices industries.

The night began at a cocktail event in the Fountain Room on the sixteenth floor of the Marriott East Side Hotel. Guests arrived, met and mingled with a lovely early evening view over the New York City cityscape. Later, at the banquet event, the first award of the evening was presented to Nadji Tehrani, TMC's founder and CEO, by Steve Brubaker, Senior VP of Corporate Affairs for InfoCision Management Corp. for recognition of Nadji Tehrani's 25 years of contribution to the industry. The award, an impressive bronze relief of Nadji, bore several of Nadji's most-quoted sayings, including "Every Company Is A Call Center," and "Quality And Marketing Are Not Part Time Jobs!"

Said Steve to Nadji upon presenting the plaque, "I would like to take a moment to recognize Mr. Tehrani. It takes someone with a vision, someone who determines that there is an opportunity and goes out and gets it. Someone who gets things done. And that's what you've done. We're so proud to be here with you. We're proud to have this great group of people back together 25 years later to celebrate your achievements. Congratulations, and Happy Anniversary Mr. Tehrani."

The first set of industry awards was given to those teleservices companies ranked in both *Customer Inter@ction Solutions'* 21st Annual "Top 50 Teleservices" list for 2006, and this year's MVP (Marketing Via Phone) Quality Awards, which recognize high standards and superior quality in outsourced call center operations.

The second set of awards were presented by both Rich Tehrani, TMC's President, and Nadji Tehrani: Lifetime Achievement Awards to those individuals and companies who literally founded the call center technology and services industry. Having heard the introductions and read the program biographies of the night's award recipients, many who have served the industry for decades, one individual who stated he had been in the industry for 21 years commented to the audience, "Considering this group, I guess 21 years makes me a rookie."

Said Nadji Tehrani of the event, "The list of Lifetime Achievement Award winners reads like the Hall of Fame roster for the contact center industry. Among them, this group of people has created literally millions of jobs and generated hundreds of billions of dollars in revenue," added Tehrani. He stressed that without the valuable contributions of these industry luminaries, the call center and teleservices industries would literally not exist.

"I am so proud of what we have accomplished as an industry, growing from nothing into one of the most important parts of global business today. Every company, no matter what its size, needs an effective call center to be successful."



L to R: Tom Rocca, President, KPI Group, LLC; Steve Brubaker, VP, Corporate Affairs, InfoCision Management Corp.; Richard Brock, CEO, Firstwave Technologies, Inc.; Hayley Savage, Senior VP, Sales & Marketing, Influent, Inc.; Nadji Tehrani; Jack Early, Founder, Early Cloud & Co.; Albert Subbloie, President & CEO, Founder, Tangoe Inc.; Ed Blank, Edward Blank Associates; Robin Richards, CEO & Chairman, The NTI Group; Ray Hansell, Chairman, Marastar Communications







James Bere, Chairman & CEO, Alta Resources; Charles Ansley, President & CEO, Symon Communications, Inc.



Eric Stracener, VP New Business Development, InPulse Response Group; Nadji Tehrani; Ray Golden, Senior VP, Blended Solutions, InPulse Response Group; Scott Swanson, VP New Business, InPulse Response Group



Richard Brock; Nadji Tehrani



Nadji Tehrani; Eli Borodow, CEO and Co-founder, Telephony@Work; Slava Borodow



Nadji Tehrani; Robin Richards



Jack Early; Nadji Tehrani; Richard Brock; Albert Subbloie



Nadji Tehrani and his daughter Miss Michelle Tehrani



Helen Foy; Jim Foy, President, CEO and Director, Aspect Software



Jack Early; Lorie Porfeli; Joe Porfeli, Chairman & CEO, Spencer Trask Software and Information Technology Group



Richard Brock; Rich Tehrani; Kevin Noonan, TMC



Robin Richards; Kathryn Barber, Barber Consulting; Ed Blank



Aleksander Szlam, Szlam Enterprises Inc.; Nadji Tehrani; Richard Brock



Gary Barnett, CTO and Executive VP, Worldwide Customer Support, Aspect Software; Sharon Barnett; Larry Mark, CTO, SER Solutions, Inc.; Nadji Tehrani





Nadji Tehrani; Kathryn Barber



Jon Hamilton, CEO, Authtel; Nadji Tehrani



Steve Brubaker



The business leaders honor Nadji Tehrani with a standing ovation.



Nadji Tehrani; Steve Brubaker; Kevin Noonan



Dudley Larus, VP Marketing, Amcat; Nadji Tehrani; Aleksander Szlam; Rich Tehrani



Chuck Burns, Executive VP of Outsourcing, NCO Group Inc.; Lisa Hagee, VP of Marketing, NCO Group Inc.; Jim Della Chiesa, VP of Sales, IEX Corp.



Steve Brubaker; Nadji Tehrani



Steve Brubaker; Nadji Tehrani



Robin Brubaker; Steve Brubaker; Nadji Tehrani



Rich and Mariana Tehrani; Nadji and Julie Tehrani; Michelle Tehrani



Nadji and Julie Tehrani



Nadji Tehrani; Rich Tehrani





The TMC Team (L to R): Dave Rodriguez; Robert Liu; Karl Sundstrom; Allan Brown; Natasha McArthur; Rich Tehrani; Nadji Tehrani; Kevin Kiley; Tracey Schelmetic; Michael Genaro; Kevin Noonan; Frank Coppola



Nadji Tehrani; Stuart Discount, President & CEO, 121 Direct Response



Nadji Tehrani; Shireen Wedlock; Senior VP Sales & Marketing, Americall Group, Inc.



Nadji Tehrani; Lori Fentem, President, Synergy Solutions Inc.



Nadji Tehrani; Michelle Halkyer, VP, Telerx; Noreen Zadarosni, VP, Telerx



Rich Tehrani; Donald E. Brown, MD, Chairman, President & CEO, Interactive Intelligence



Rich Tehrani; Joseph Staples, Senior VP, Worldwide Marketing, Interactive Intelligence



Rich Tehrani; Gary Barnett



Rich Tehrani; Jim Foy, President, CEO and Director, Aspect Software



Rich Tehrani; Debbie May, President & General Manager, IEX Corp.



Nadji Tehrani; Kathryn Barber



Nadji Tehrani; Ed Blank





Nadji Tehrani; Richard Brock



Nadji Tehrani; Kathleen Kelly, CEO, TeleDirect International



Nadji Tehrani; Ron Harris, VP Sales, Convergys Corp.



Nadji Tehrani; Charles Judd, President & CEO, NTS Marketing



Nadji Tehrani; Jack Early



Nadji Tehrani; Robin Richards



Nadji Tehrani; Ray Golden



Nadji Tehrani; Tracy Schwartz (accepting on behalf of her father Ted Schwartz, Founder & Chairman, APAC Customer Services, Inc.)

# Highlights Of The *Customer Inter@ction Solutions'* 25th Anniversary Event

During the special night of May 4, 2006, at *Customer Inter@ction Solutions'* 25th anniversary celebration, the honorees of the Lifetime Achievement Awards offered many wonderful comments about their experiences in the industry. Here, we've reproduced the highlights of the evening's acceptance speeches. Congratulations to all the winners.



## Robin Richards, The NTI Group, Inc.

It was about 20 years ago that I got this idea to join the teleservices industry, except that it wasn't an industry yet. There was a gentleman named Murray Roman, who some of you don't know, who really started this thing. He had three brilliant people who worked with him, and one of them is here...Ed Blank. Also Steve Idelman and Ted Schwartz, who began their own companies. That was the beginning of this great industry. It was a wonderful, wonderful journey that I was on for almost eight years. I see a lot of my old friends, and it feels wonderful to be back with all of you.

We were a bunch of folks who were just trying to make a living for our

families. We didn't know from teleservices, we didn't know it was an industry. We had an idea, and were trying to make a living. And up comes this guy, and his name was Nadji Tehrani. For 20 years, Nadji, you have been the voice, the advocate, the leader, the promoter of an industry that you saw before it was an industry! Before any of us knew it was an industry!



Robin Richards

I remember all the different things that you did, Nadji. First of all, I want to say I'm grateful, I'm humble. I came to New York after being away for almost 14 years because you asked me. What you've done here you should be very proud of, and your family should be very proud of. I was

speaking with Kathryn Barber before, and she commented that when it comes to this industry, Nadji sees it before everybody else. I said to her, "I agreed with you 18 years ago, and I still do. But a man who keeps seeing it for 20 years in advance of everybody else is a conscious, competent visionary. He had an awareness in this industry in the beginning. Nobody knew about this industry, we called it telemarketing. And it turned out to be the call center industry. And it's a damn good thing to be associated with. When people ask me about my early days, I say, "I was a telemarketer, and I'm proud of it."

In the early days, Nadji said, "We have got to get the politicians to know who we are. There are five million Americans employed in telemarketing." He did all these calculations, and he looked at me and said, "You know, one day this industry will be bigger than General Motors." You had such passion, and you started writing letters to politicians and open letters to the President and Congress.

And then you said, "I think quality is very important," and you came up with the MVP [Marketing Via Phone] Quality Awards, and everybody began





to apply for them. We learned from one another, and said, "Hey, that's a pretty good idea." And all the sudden, everybody began with best practices, and the whole industry was lifted because of those MVP Quality Awards. I remember the first award... Ted Schwartz of APAC got the gold MVP Quality Award. Unfortunately, I only got the silver award.

We worked so hard, and we acquired awareness, political and economic. Then we had quality. Then this young man named Rich Tehrani shows up, and Nadji said, "My son is very, very smart. He likes this technology stuff. What do you think?" And Rich started writing about technology, fifteen years in advance of everybody else.

On the plane on the way here, I began to think. What has this great industry done in the way of technology? Call routing. Think of all the industries using call routing today. Database management. Offer cycle management. They all came out of this industry. How about monitoring? You can't pick up a phone to call a company nowadays without hearing, "This call may be monitored." It happened here. It happened in this industry. Also, scheduling and optimizing software, which today is the most critical component of Walmart's business, and most other Fortune 500 businesses.

Finally, you promoted us, Nadji. You tirelessly promoted every person in the industry. You seemed to know which companies were good and which people were good. I've known this man for 20 years, and he never says, "I did." It's always "you guys." "You guys are great. You guys are readers. You guys did some amazing things."

Tonight, you've given out a lot of Lifetime Achievement Awards to people who are very deserving. But I can tell you, once in your life, I would like everybody to stand and say, "The Lifetime Achievement Award tonight goes to Nadji Tehrani." Thank you from the bottom of my heart.

**Steve Brubaker, Senior Vice President of Corporate Affairs, InfoCision Management Corp.**

What we are here to celebrate is the amazing achievement TMC started in 1982. What an organization! What an industry they have built. To Mr. Tehrani and the staff, let's give TMC and all the team behind that a hand. Twenty-five years! What an accomplishment!

I would like to take a moment to recognize Mr. Tehrani. We go back a long way, but it takes someone with vision, someone who determines there's an opportunity and goes out and gets things done.

**Ray Golden, Senior VP, Blended Solutions, InPulse Response Group**

What I most admire about Nadji is his courage. He had the courage to be the only one in the world to come out with a magazine called *Telemarketing*. Whether people liked it or not, he promoted our industry in its keenest light and promoted the legitimacy of this marketing vehicle that helped us all, and he continues to promote us today.

**Ron Harris, VP of Investor Relations, Convergys**

I just want to say that we, at Convergys, are very respectful of the accomplishments of this industry. We appreciate being recognized in an industry that is very exciting and very competitive, and it's helping make the world flatter. We are delighted to be recognized among such great individuals and companies, and we appreciate the recognition for the Lifetime Achievement Award.

**Jack Early, Founder, Early Cloud & Co.**

I feel to a certain degree that I'm blessed because Nadji remembered the "Old-Timers' Division" tonight. Many

of us have come, achieved, gone, moved on, come back, gone again. I see many young faces around this industry, which thrills me. But through the whole period of change, there was one beacon, and that beacon was Nadji Tehrani. He was the steward who minded the store, who stayed with the deal when it was tiring and fatiguing and all of us came in and out, but there was one person who always carried the banner, and that is Nadji.

**Ray Hansell, Chairman, MaraStar Communications**

There are several things that made this industry happen. They are the formation of the trade associations, publication of the trade journals, and trade shows. And two of those three things, this guy [Nadji Tehrani] was all over in the early 80s. We're an industry. We're something to be recognized. And back in the 80s and into the 90s, he took that, and put a big red bulls-eye on his head, and took a lot of flak in the process of [helping this industry].

**Kathleen Kelly, President and CEO, TeleDirect International Inc.**

I just have to say over the last 20 years that I have been in the industry, this industry is amazing. We've been impacted by stock market ups and downs, negative press, dotcoms, 9/11, restrictive legislation...and every time, [this industry] figures out what it is, embraces it, and every single time, we've continued to adapt and grow.

**Joe Porfeli, Chairman, CEO, Spencer Trask Software & Information Technology Group**

I got a phone call 12 years after I left [this] industry. My assistant said, "There's a fellow named Nadji Tehrani on the phone," and a smile came onto my face. This fellow evokes great emotions in everyone.

**Tim Searcy, CEO, American Teleservices Association (ATA)**

I love this business. I love everything about it. I think what's so interesting about our business it's that it's completely efficient. It doesn't matter where you grew up, it doesn't matter how much college you had or how much money you have. At the end of the day, if you do a good job, you can go from the calling room to the boardroom, and I'm a living testament to that.

I want to thank Nadji, because he's not just a good friend, he's a visionary. I want to share something with you. One of the things that people don't think about, from Nadji, is that he is "the answer." When we have questions, serious questions, and when we were starting this industry, Nadji answered our questions. And when the dotcoms came, Nadji answered the questions. When it came to going offshore, Nadji answered those questions.

**Doug Smith, Senior VP, Sales And Marketing, SER Solutions**

[Via letter]: Nadji, I want to thank you and TMC for honoring me with a Lifetime Achievement Award for my contributions to the industry. I truly

regret that I was not able to attend the gala event to personally accept my award and enjoy the company of so many other deserving recipients.

I am flattered that you and Rich think of me in this manner. I thoroughly take pleasure in supporting the contact center market and the challenges of applying technology to help satisfy call processing/management applications. It certainly has been a pleasure knowing you over the years and being associated with your quality publication.

The award will be displayed in a visible location in our office and I will always be grateful for the recognition. I look forward to many more years of our friendship and association with TMC.

**Sheri Idelman, Vice Chair, Chief Operating Officer, Co-founder, Solutionary, Inc.****Steve Idelman, Chairman of the Board, CEO, Co-founder, Solutionary, Inc.**

[Via a recorded message played at the event]: Hello to all our esteemed colleagues, as Nadji himself would say. Sheri and I really wish we were able to

be with you all tonight. We talk about and think about our former comrades from time to time. We thank our allies and competitors alike for your roles in our careers, especially people like Ed Blank, Jon Hamilton, Kathryn Barber, Joe Porfeli, Ray Hansell, Robin Richards, Brent Welch and many other fine friends and associates I'm neglecting to mention here. Sheri and I could not possibly accept our award tonight without seriously bowing to Mary and Gary West, and without acknowledging Ted Schwartz and his entire family. And of course there is, and always will be, a very, very special place in our hearts for you, Ray Golden.

Last, but not least, I ask you all to raise your cups and toast with me: To our esteemed colleague, Nadji Tehrani, and to you, Rich, Michelle and all the other Tehranis on the entire family tree. And to the entire team of professionals at TMC. We lift our cups in your honor and we thank you for what you have always meant and done for us, and for everyone in the industry. More than any other thing we might all say here tonight, Nadji...this one's for you. Because as I always liked to say, "There is no biz like phone biz." Congratulations to everyone. **CIS**



The business leaders honor Nadji Tehrani with a standing ovation.





# ***Congratulations***

to Nadji and his team at



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# *Customer Inter@ction Solutions'* Seventh Annual CRM Excellence Awards, Part II

For the seventh consecutive year, the editors of *Customer Inter@ction Solutions* dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. Below is Part Two of the winners list — the companies that offer the best and the brightest customer relationship management products and services, all to the benefit of their clients. Winners were chosen on hard data: quantifiable results that convinced us, without a doubt, their clients were infinitely better off with these companies' products and services than without.

Congratulations to the winners!

**EDITOR'S NOTE:** Because of the very large volume of award applications we received, the CRM Excellence Award winners have been presented in two parts; the first part appeared in the May 2006 issue of *Customer Inter@ction Solutions*.



## Intervoice, Inc.

### PersonalizeIT

<http://www.intervoice.com>

PersonalizeIT (news - alert) provides a new way of offering services to customers, by enabling voice and speech self-service systems to act like the best customer service representative, recognizing and anticipating customer needs and preferences and providing real-time, individually tailored service to callers. The client, a mobile services provider, needed an easy way to allow its subscribers to alter their plans. With the company's previous solution, it took agents an average of three to five minutes per call to complete a transaction. With the PersonalizeIT rules-based engine, the same analysis was performed within the self-service system by matching caller preferences, call patterns and volume and by verifying that the current plan remained the best fit, or by making a recommendation for a better plan to the caller. Post-implementation, the client experienced a 10 percent increase in containment of calls within the self-service system; a 15 percent increase in user satisfaction; and a 50 percent decrease in development, testing and implementation time.





**KANA Software****KANA Response**

<http://www.kana.com>

The client, ([news](#) - [alert](#)) a large European provider of multichannel, multilingual contact center services for U.S. and European clients, had determined that its first and most critical e-channel in the contact center was e-mail. The company began a search for an e-mail management solution that combined reliability with productivity tools that would streamline message handling processes. By testing a variety of offerings, including hosted solutions, the client recognized that KANA Response would meet their needs and demonstrate the company's credibility in the quality customer support market. "We bombarded KANA Response with e-mails during our testing phase," said the client. "It quickly became apparent that the system could easily manage any seasonal volume spikes and our expected growth."

**Knova Software****Knova 6.5**

<http://www.knova.com>

From the initial launch and overhaul of Knova's ([news](#) - [alert](#)) online self-service capabilities in February 2005 to the introduction of Answer Wizards in October 2005, the client, an Internet service provider, is setting a new standard for online self-service. The following accomplishments are great areas of pride for the client:

*Customer empowerment:* With the addition of intelligent, guided search, and Answer Wizards, more customers have the option of solving problems easily online, without feeling the need to rely on assisted support. The online experience seems easier and more manageable.

*Business owner empowerment and productivity:* The creation and management of Answer Wizards is now handled by a business owner via the Knova administration console. This eliminates many costly and time-consuming dependencies on IT.

*Answer consistency:* With the addition of Answer Wizards and more powerful search spanning more content sources, customers get more consistent, accurate answers. This reduces confusion and the need for follow-up support.

**LiveOps****LiveOps Hosted Contact Center**

<http://www.liveops.com>

LiveOps' ([news](#) - [alert](#)) client improves the delivery of healthcare to Medicare and managed care beneficiaries by providing medical products and prescription-related services. The client selected LiveOps' solution based on its ease and speed of installation; its comprehensive suite of call center functionality, including workforce hiring and management tools and real-time analytics; its single point of visibility into the performance of a distributed workforce; its short training/orientation period; the solution's scalability to meet seasonal peaks and valleys in call volume; and the availability of LiveOps' agents to handle overflow calls. After the choice was made, the client's contact center went live in just three weeks. The scalability of the solution allowed for continuous growth, and demonstrated its value by enabling the client to provide an immediate disaster response following Hurricane Wilma.

**Maximizer Software****Maximizer Enterprise 9**

<http://www.maximizer.com>

([news](#) - [alert](#)) The client, which sells and installs sports courts and sports floors, said "We spent so much time tracking and managing projects that we couldn't get out as many new job proposals as we wanted. We knew if our sales team could increase the number of proposals on prospects' desks, we'd be able to increase business and grow the company." The management team needed a way to keep each new project organized and under control. Post-installation, significant results include revenue growth of over 400 percent;

new projects allowed the client to increase its staffing levels by more than 75; service response times have increased by an estimated 50 percent; new inquiries are followed up in more timely manner; internal communications continue to improve; and management is now able to generate powerful reports with key performance indicators, allowing for more accurate sales forecasts.

**OKS Ameridial****Outsourced customer care services**

<http://www.oksameridial.com>

([news](#) - [alert](#)) The client is a \$160+ million consulting and outsourcing firm that helps clients improve corporate performance through the integration of people strategies, process management and technology. The challenge was to increase the quality of surveys completed, have them completed faster, and have them completed more cost-effectively than with past vendors. OKS-Ameridial rose to the challenge and was able to quickly work with the client to get the project implemented within five days. The end results was that OKS-Ameridial was able to complete the project on time, under budget and with a higher completion rate than past vendors. The client stated, "Bottom line — OKS-Ameridial is a true partner, and treats us as such through all our interactions with them. We look forward to benefiting from their services and best practices for this recurring annual research, and any of our future research needs."

**Onyx Software, Inc.****Onyx Customer Management and Onyx Analytics**

<http://www.onyx.com>

([news](#) - [alert](#)) The client, a provider of healthcare-related outsourced customer care, initially grew its product and service offerings through a series of acquisitions around the world, resulting in customer information being stored in numerous databases. In emergency situations, when patient details are vital, the

company needed to get the right information in the hands of the right people, fast. The company chose the Onyx solution as its core system component, intending to create a single shared customer system across sales, marketing and executive management. Today, Onyx coordinates and stores all the data relating to customer and sales activity and enables account managers to more effectively serve their customers and identify new sales opportunities. The company has been able to increase efficiency when responding to emergency situations by smoothly integrating with other internal systems and consolidating existing data into useful information, thereby improving the overall quality of the emergency response. It enjoys 92 percent higher satisfaction levels compared to prior tools and methods.

#### Parus Interactive

**Parus Interactive Order Status Application**  
<http://www.parusinteractive.com>

(news - alert) A large online wine retailer needed to automate its shipment tracking processes to both improve its customer experience and reduce the expense of such customer handling. The intent was to find an application to process incoming customer order status calls without the need for human intervention and, as a result, drive down the average call handling cost. Parus Interactive's Order Status Application helped the client achieve its goals by automating follow-up phone calls to check on the shipping status for all orders processed through voice-activated self-service solutions. Parus' application provided the retailer with an automated voice-activated solution, enabling its customers to self-manage shipment tracking for orders handled by FedEx and UPS. The client's call deflection goal for the Parus IVR system was 20 percent of all order status calls received. Currently, 41 percent of order status calls are successfully deflected to the Parus IVR system.

#### Pegasystems

**Pega Customer Process Manager**  
<http://www.pegasystems.com>

(news - alert) The client, a provider of ancillary employee benefit coverage and services, selected Pegasystems' CRM capabilities to move beyond a process-driven approach to customer service to address what their customers really care about — fulfilling service requests with speed and intelligence. The company implemented Pegasystems' rules-based solution to be able to respond quickly to changes in organizational objectives, market opportunities and industry regulations. The solution's fully integrated customer service capability allows for higher levels of CSR productivity and increased member satisfaction. "We are committed to making it as easy as possible for our customers to do business with us, and working with Pegasystems has enabled us to continue to enhance our services," said the client. "The rapid 'go live,' in only five weeks, was exactly what we needed, and Pegasystems delivered."

#### Proficient Systems

**ProficientSales Server**  
<http://www.proficient.com>

(news - alert) The client, a consumer insurance Web site, began a test run of ProficientSales Server to prove that by using the solution, they would improve the overall experience for their online consumers and consequently increase sales conversion. By tracking and analyzing the behavior of Web site visitors, the Proficient solution makes intelligent, data-based decisions about when and how to approach prospects. To date, the client has increased customer retention and customer satisfaction ratings. Survey feedback indicates that the company's customers enjoy shopping for auto insurance online, and are extremely pleased with the assistance they receive from their online agents. In addition, the client experienced a 7.6 percent lift on conversion rates with any Proficient involvement (display, approach or engagement), a 26.1 percent lift on conversion with a Proficient engagement and a 5 percent sales lift.

#### RightNow Technologies

**RightNow CRM 7.5**  
<http://www.rightnow.com>

An e-business solutions provider reports it has been able to take its business to a new level by transforming its marketing, sales and customer service operations into a tightly linked chain using RightNow (news - alert) CRM 7.5. "Before we implemented RightNow, salespeople could easily get blind-sided by a service-related issue they knew nothing about," said the client. "Now, sales, service and marketing activities for each customer all reside in a common customer database. So everybody in our company has easy access to the same customer information in one integrated Web application." The combination of self-service and increased productivity alone enabled the client to keep its customer service headcount flat even as its business doubled in size. That payroll savings represents just under \$180,000 annually.

#### SafeHarbor Technology Corporation

**SafeHarbor SmartSupport Solutions**  
<http://www.safeharbor.com>

(news - alert) The client, a Western state's official Web site, serves as the public portal for state and local government information and services. With the call to migrate government services to the Web, providing online customer support round-the-clock was paramount to the success of the state's Web initiatives to drive users to online services and ensure an exceptional user experience. The client selected SafeHarbor based on the company's extensive customer support expertise, best-of-breed technology and their ability to deliver a full-service online support offering, including assisted support agents, to handle escalation channels such as phone, e-mail and chat. Through the continuous improvement of the support site over the past several years, user interaction, participation and collaboration continue to grow at impressive rates.



**Sage Software****Sage CRM**

<http://www.sagecrm.com>

(news - alert) The client, a wholesale food manufacturer, notes, "Our sales managers are brought up to speed on what's going on out in the field, and vice versa. [Sage CRM] gives them the macro and micro view. They utilize it for following up on deadlines, attacking a specific proposal or rectifying a customer problem. Now, sales representatives in Florida know what their counterparts in Michigan are doing without having to call. This process improvement has created a significant increase in communication among the sales team. Employees now use Sage CRM to follow up on deadlines, create and monitor proposals and solve problems for our customers. Everyone on the team is

connected. Our biggest gain from Sage CRM is the ability to share customer and prospect databases with all users.

We were aiming to better manage leads and accomplish more sales growth, which is what we are seeing as a result of implementing Sage CRM."

[salesforce.com](http://www.salesforce.com)

**Salesforce Winter '06**

<http://www.salesforce.com>

(news - alert) The client, a network security company, deployed Salesforce Service & Support across its global enterprise to achieve expanded product visibility into more than 15 networking and security product families. With the same number of support agents, the client was able to handle more than 3,000 cases per month. The client company reported that it improved

multichannel communications and experienced quantifiable overall efficiency improvements; raised customer satisfaction rates by five percent over three months; consolidated customer management across sales, service and engineering; and experienced overall cost savings of \$60,000 in outsourced survey management fees alone, \$500,000 in e-mail-to-case annual productivity savings and headcount reduction due to improved dashboard and reporting capabilities.

**Salesnet**

**Salesnet Extended Edition**

<http://www.salesnet.com>

(news - alert) The client, a technology solutions provider, determined that Salesnet was the best fit for their needs as the solution offered the workflow

[www.4cxm.com](http://www.4cxm.com)

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and detailed sales process functionality that the client was looking for. Salesnet was also able to offer a plan that allowed the client to implement the CRM system in parallel with their upgrade. While still in the implementation phase of the project, the client is already seeing great results and couldn't be happier with their selection.

"Already, everything we have seen from the product and the implementation has validated our decision," they reported. The client also noted that unlike its competition, Salesnet's workflow "is fluid and drives the rep right through the predefined process."

### Saratoga Systems

#### Saratoga CRM 6.5

<http://www.saratogasytems.com>

(news - alert) The client company, a manufacturer of thermostats, has stated that its CRM user base and technology support personnel recognized the importance of maintaining the flexibility they had already experienced, first with Saratoga Systems' SPS and then with Saratoga Systems' Avenue. The latest upgrade to the next-generation Saratoga CRM gives the company the ability to jump forward significantly in terms of its underlying technology, with a single upgrade. More important, the company will retain all of its accustomed flexibility, and the new platform will continue to enable the sort of fast-paced future system configuration and development that the company needs to keep pace with the moving target that is CRM. According to the client, that level of power and flexibility is crucial to continue to respond efficiently to the changing needs and demands of its customers.

### SAS

#### SAS Marketing Automation and SAS Interaction Management

<http://www.sas.com>

(news - alert) With more than 13 million consumer banking customers and one million business customers, the client, a large financial services

company, needed to mine customer data efficiently and then deliver insight regularly across a variety of segments. To ensure success in those efforts, the company chose SAS Customer Intelligence. With SAS, the client defines contact strategies for customers with a consistent, personalized message across all touch points, including call centers, branch sales staff, service personnel and direct mail. SAS allows the client to understand customer behavior over time so its bankers can act on significant changes immediately — when intervention is likely to have the most impact, thus accelerating sales opportunities and salvaging at-risk relationships. Says the client, "The investment we're making in expanding our customer insight platform will have a significant payback over the next five years."

### SER Solutions, Inc.

#### CPS Enterprise Edition (CPS E<sup>2</sup>)

<http://www.ser.com>

CPS E<sup>2</sup> (news - alert) is a next-generation outbound contact center solution designed to increase customer satisfaction levels; foster loyal, long-term customers; and boost recurring revenue. The client, a direct supplier of mobile phones to nearly two million customers, began relying on outbound telemarketing in the mid-1990s to generate new business. As the center grew in size and success, its databases became larger and the number of campaigns increased. The client's management team needed to increase its outbound dialing capacity. After an intense review of all industry providers, the client chose CPS Enterprise Edition (CPS E<sup>2</sup>), SER's outbound call management solution. Within three months of implementation, the client had already reached its sales targets for the new group. With 50 full-time outbound agents and growing, the center was reaching 20,000 contacts per day, bringing the total to over 2.5 million connections in its first few months. Said the client, "We knew we had

made the right decision when, within the first few weeks of use, CPS E<sup>2</sup> was proving to be easier and more adaptable than our existing dialer and was helping us reach our sales goals."

### SITEL Corp.

#### SITEL Outsourced Customer Care

<http://www.sitel.com>

(news - alert) The client, a solutions provider for the government sector, needed to retain outsourced customer care for its business with the new Medicare Prescription Drug Program. The client required a contact center partner that had the experience to handle calls of this nature, along with the ability to ramp up an extremely large number of agents in a short amount of time. Sixty SITEL employees were involved, including members from the technology, telecommunications, training, facility, human resources, LAN, WAN and account management teams. Three of the facilities were fully operational, and a normal program launch was implemented. Two of the sites were dark and had to be completely rebuilt, and the final site had to be rebuilt after a client close-out. These three sites needed new cable, electrical, workstations, phones and PCs. In October 2005, the program launched simultaneously — and trouble-free — in all six locations. Throughout the months of this program, SITEL exceeded all services levels, including the proposed quality goal of 90 percent.

### SIVOX

#### SIVOX RealCall

<http://www.sivox.com>

After discovering SIVOX (news - alert) RealCall Simulation Tools, the client, a large telecommunications provider, is rolling out a call center training system that is flexible, easily deployed and highly interactive. It's the closest the client's trainees can come to real customer interaction without handling live calls. The SIVOX RealCall system will be rolled out to all 18 of the client's call centers serving over 15,000 agents. Initially, the training will



encompass five major customer scenarios: from initial customer service sign-ups for new products through advanced training scenarios involving saving customer accounts during an initial request to drop service. The client estimates this training will have a payback period of less than four months.

#### **Soffront Software**

##### **Soffront CRM**

<http://www.soffront.com>

(news - alert) The client, which manufactures switching products for telecom software developers and service providers, had a simple request for CRM. When the management team members queried customer information, they wanted to be able to go to one place for any information needed — latest activities, recent trip reports,

open technical issues, etc. The client has been successful with the Soffront CRM solution, as evidenced by the many firsts the company has been able to achieve, including one common system for tracking corporate-wide contracts. Information is synchronized across functional areas, resulting in more satisfied customers, and the client now has the ability to incorporate customer and site-specific data in one area for integrated tracking by the sales and support teams. Reporting shows that the client realized a 64 percent increase in user satisfaction with the Soffront CRM solution.

#### **Talisma Corp.**

##### **Talisma Customer Interaction Management (CIM)**

<http://www.talisma.com>

(news - alert) The client, a global provider of imaging products, wanted to build competitive advantage through first-rate customer service and sought a multichannel customer communication system to facilitate this service. The client deployed Talisma's Multi-Channel Customer Interaction Management (CIM) Suite as it provided a unified view of all customer interactions and provided integrated e-mail and chat channels for superior online service. With the Talisma Multi-Channel CIM solution, the client quickly realized the following improvements: a 30 percent increase in efficiency; a 38 percent reduction in the cost of handling enquiries; overwhelming positive feedback on the new system; and a dramatic increase of 1,125 percent in online enquiries.

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### Telephony@Work

#### CallCenterAnywhere

<http://www.telephonyatwork.com>

(news - alert) The client, an insurance company, found that as their business grew, they had difficulties keeping up with the needs of their customers. Average hold times had increased to 20 to 30 minutes. The company selected Telephony@Work's CallCenterAnywhere because it offered a single, pre-integrated solution to each of their pain points. CallCenterAnywhere provided a cost-effective means of implementing the ACD with skills-based routing, self-service IVR and quality monitoring and recording features the client needed to solve customer service problems. Since the deployment, the client has made significant improvements in customer service. Average hold times have been reduced to less than two minutes, and their abandoned call rate is at an all-time low. In addition, by enabling a large portion of their inquiry calls to be serviced through a self-service application, Student Insurance was able to manage their call volume in-house. They no longer required the services of an outsourcer, eliminating the associated \$30,000 to \$40,000 monthly expense

### TELUS Communications Inc.

#### Telephony@Work's CallCentreAnywhere, hosted by TELUS

<http://www.telus.com/callcentreatanywhere>

(news - alert) The client, a large credit union, said, "Member service continues to be absolutely critical as we reinvent neighborhood banking. We're owned by our members, and while our legacy equipment and software were adequate for our operators, they simply didn't represent the step forward we had to deliver to our members." However, purchasing new equipment would have required a considerable capital investment. TELUS CallCentreAnywhere is Canada's first fully hosted and managed multichan-

nel call center solution. For the client, that meant having access to the latest call center features and functionality without capital expenditure. The client currently uses 25 TELUS CallCentreAnywhere seats, with the option to scale up at any time. Each agent needs only a phone and a computer to access the system, which resides at a highly secure TELUS Internet Data Center. TELUS maintains and monitors the system around the clock to provide guaranteed availability and built-in disaster recovery. If, in an emergency situation, the employees can't access the client's head office, the call center staff can log on and continue working.

### Tigerpaw Software

#### Tigerpaw CRM+

<http://www.tigerpawsoftware.com>

The CEO of the client company, (news - alert) a telecommunications organization, spearheaded a switch to Tigerpaw after toiling through three failed applications in as many years. These unsuccessful stints left the client firmly back at square one, with disconnected sales, service and accounting silos that each required their own system of manual data entry. Said the CEO, "While many CRM applications claimed to offer integrated modules, it was Tigerpaw that delivered the true integration we required. The ability to enter information one time, in one place, saved us a lot of time and mistakes." Tigerpaw enabled the client company to finally manage its complete customer lifecycle — from prospecting all the way through the sales process, ongoing service management and inventory tracking — and maintain easily accessible information throughout.

### UCN

#### inContact

<http://www.ucn.net>

A New York-based local exchange carrier chose the inContact (news - alert) service solution from UCN to support over 50 customer care agents located in two geographically dispersed

offices. The inContact system provides the carrier with a unified contact handling and management system, helping the company maintain its quality service levels while decreasing costs. The solution helped the client supplement the functionality of their existing PBX with intelligent network services that met their requirements for database integration, screen pop support, tracking, monitoring, recording and remote office support. "At the end of the day, we had a solution that was less expensive and easier to implement than a leased equipment solution," said the client. "Plus, we wouldn't have to worry about maintaining complex hardware and software at each site." An added advantage is inContact's inherent disaster recovery capabilities, enabling the carrier to quickly and easily redirect inbound calls to agents at a remote office or to at-home workers.

### Unica Corp.

#### Affinium

<http://www.unica.com>

(news - alert) The client, a South American telecommunications provider, evaluated several vendors before choosing Unica's Affinium software solution for enterprise marketing management (EMM). Affinium was chosen for its ease-of-use; breadth and depth of product functionality; and flexibility for creating, testing, executing and analyzing multichannel communication strategies. With Unica's Affinium, the client is now able to automate the execution of coordinated cross-channel campaigns, allowing them to grow campaign volume by 20 percent in one year with the same resources. Specifically, over 100 targeted campaigns are run each month. Additionally, real-time relevant offer delivery in the call center has increased response rates by 50 percent.

### Unipress Software

#### Footprints 7.0

<http://www.unipress.com>

(news - alert) The client, a large





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multinational company's subsidiary that services the electric power equipment market, was challenged with centrally managing internal IT support for multiple, dispersed divisions. The client evaluated the solutions of several providers and ultimately chose FootPrints. Today, the client uses the solution to provide IT support, including PC and network support, to 1,000 employees across five divisions. The client's IT department now manages roughly 680 tickets per month, or 23 tickets per day within a 30-day month. The client said, "FootPrints does save us time and money. In terms of hard dollars, we are saving nearly 50 percent annually in maintenance costs alone compared to what we were paying with our previous solution. Also, with that solution, we were using outside consultants. By completely removing the consulting fees from our departmental budget, we were able to invest in other areas more important to us."

#### Verint Systems

##### Verint's ULTRA Analytics Suite

<http://www.verint.com>

ULTRA Analytics helped its client, an insurance company, [\(news - alert\)](#) address three main customer service challenges: increase first-call resolution rates; improve agent proficiency and identify areas for training; and manage quality and ensure high levels of customer satisfaction. Almost immediately after deploying the ULTRA Analytics Suite, the client was able to identify the root causes behind many of the repeat calls it was receiving. By addressing these issues, the company experienced an immediate and dramatic decrease in the number of incorrect transfers and unanswered customer issues that were the cause of high repeat call rates. Verint's solution helped the company improve the proficiency of its agents by identifying specific skills that needed improvement. The client used the actionable intelligence it mined with the QM tool to develop a comprehensive

agent feedback and training program that included refresher training for existing employees and new agent orientation programs.

#### Vertical Solutions Inc.

##### PowerHelp CRM

<http://www.verticalsolutions.us>

[\(news - alert\)](#) The client, a provider of corporate and residential Internet products, VoIP long-distance and PBX-based solutions, needed to install a CRM system to help it manage its growing business. The company evaluated more than a half-dozen CRM solutions to use internally before choosing PowerHelp CRM. The product met its needs with its full functionality and ease of integration, but the company was pleasantly surprised to discover the low cost of implementation for PowerHelp CRM. "Many of the CRM solutions we evaluated required extensive professional service fees for successful implementation — often upwards of 10 times the initial product price," said the client. "PowerHelp CRM offered us out-of-the-box functionality with minimal customization. It has the functionality that we need, is easy to use, and has a very low ratio of service to product costs — typically, the ratio is one-to-one, or less."

#### Witness Systems

##### Witness Systems' Impact 360

<http://www.witness.com>

[\(news - alert\)](#) The client, a provider of IT outsourcing and maintenance, used a variety of systems from different providers to handle forecasting and scheduling in its contact centers. This method delivered adequate results in help desk environments with small agent group sizes and a relatively low number of calls per agent. However, with the acquisition of a new, 500-seat product support account for a major computer manufacturer, it became clear that the client required an expanded set of workforce management capabilities. The company turned to Witness Systems. "We performed an evaluation and saw that this

solution was the best. It not only provided the skills-based routing and virtual contact center support that we wanted, but also created schedules that reflected union regulations and regional laws," said the client. Since implementing Impact 360 Workforce Management, the client has realized a significant return on its investment. "We've had a tremendous reduction in cost and headcount," said the client.

#### Z-Firm

##### ACT!-Integrated FaxRush, PrintRush and ShipRush Server

<http://www.zfirm.com>

With Z-Firm's [\(news - alert\)](#) OmniRush Family, the client, an IT firm, automated steps throughout marketing, sales and fulfillment. From a single interface right inside ACT!, employees can print direct mail campaigns en masse, fax invoices upon completion of a sale, print shipping labels and answer customer inquiries about the status of shipments. With these activities integrated with ACT!, everyone in the company has a record of all activities and communication with each contact. When an order comes in, employees select that contact record in ACT! and choose either UPS or FedEx. The user simply checks a few options and the ready-to-use label prints. At the same time, ShipRush Server records the tracking number in ACT! history and automatically e-mails it to the customer. While a shipment might have taken five to 15 minutes to prepare before, requiring employees to copy and paste information among programs, now users can prep a shipment in seconds. **CIS**

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## One Step At A Time: How World Class Contact Centers Are Achieving Their Workforce Optimization Goals

By Bob Webb, Pipkins, Inc.

Most contact centers today are researching — or have already implemented — a workforce optimization (WFO) solution. Satisfied with their call delivery infrastructures (PBXs, ACDs, etc.), contact centers of all shapes and sizes are now implementing software-centric workforce optimization solutions to tackle critical business issues, such as improving agent retention and effectiveness, increasing customer satisfaction and maximizing overall business performance and profitability. In fact, industry analyst Datamonitor expects global revenue of investment in workforce optimization technologies to exceed \$1 billion by the end of 2006.

Workforce optimization goals vary enormously from one organization to the next. Factors such as the size of the contact center, business nature and infrastructure — not to mention the budget constraints that influence and frequently limit the scope of choice — make the purchase of expensive “one size fits all” suites of workforce optimization solutions impractical. Many organizations have been forced to do without, the alternative being to invest in applications for which they have no use and perform costly integrations or incur exorbitant professional services fees to implement the solutions they actually need.

### A New Modular, Best-of-Breed Approach

Times have changed with the emergence of new, modular suites that consist of the six components implemented for workforce optimization: call recording, quality monitoring, workforce management, performance management, speech analytics and agent coaching. This modular approach gives organizations the freedom to build their ideal workforce optimization solution at their own pace. You can select the best-of-breed solutions you really need, and then add additional applications as you grow and evolve. By implementing workforce optimization solutions one step at a time, organizations can benefit from rapid implementation and outstanding, more easily measurable return on investment (ROI) — both of which make for more attractive and effective initial purchase proposals to your budget committee.

### Laying The Groundwork

By now, most successful contact centers already rely on workforce management and call recording solutions. They are the fundamental building blocks of any workforce optimization solution. A workforce management solution enables companies to balance work volume and resources to achieve efficient operations and a desired quality of service. It offers call centers comprehensive scheduling, forecasting and planning functionality for complete enterprisewide, multi-site contact center workforce management. A call recording solution enables companies to capture a goldmine of customer intelligence, and also helps protect organizations from compliance and liability issues, while enabling them to monitor agent-customer interactions for quality assurance purposes.

Sadly, these essential technologies have, until recently, been severely limited in their effectiveness due to a general reluctance to invest in expensive integrations. There are significant benefits to be gained by implementing a workforce management and/or call recording solution designed to integrate seamlessly with an entire suite of





workforce optimization solutions. For example, by integrating workforce management with real-time performance management and automated agent coaching solutions, companies can take advantage of real-time agent productivity tracking, multimedia agent training and agent performance reporting tools. In addition to optimizing agent scheduling, companies can improve agent productivity, effectiveness and accountability.

## The Next Level of Workforce Optimization

Performance management, agent coaching and speech analytics applications are the latest additions to the workforce optimization family of solutions. These remarkable technologies have revolutionized the contact center. Performance management solutions enable contact centers to collect data and present real-time and historical performance information to agents, managers and executives within the call center environment. Agent coaching applications automatically intervene when agents are under-performing by delivering training content in the form of courses, educational

tips, quizzes, training flashes, pre-shift announcements and bulletins. Managers can deliver multimedia coaching and training to agent desktops on a schedule- or rules-driven basis. With a speech analytics solution, organizations can extract business intelligence from their agent/customer call recordings. Speech recognition technologies mine conversations and identify call trends: a process that was too costly and time consuming to uncover using traditional, manual methods.

## Step-by-Step: The Key To Success

Maybe your organization would benefit from implementing a workforce management or call recording solution only. Or, maybe agent coaching and performance management solutions would offer greater advantages. It depends upon the needs of your specific environment. The point is, as long as you purchase your solution or solutions of choice from an integrated suite of workforce optimization applications, you won't have to worry about interoperability issues that would otherwise limit your options and seriously stunt your workforce optimization goals. **CIS**

**Performance management, agent coaching and speech analytics applications are the latest additions to the workforce optimization family of solutions.**

*Bob Webb serves as VP of Sales for Pipkins, Inc., ([news](#) - [alert](#)) a leading supplier of workforce management software and services to the contact center industry. Pipkins has partnered with Voice Print International and Syntora to develop Solution Made Easy, ([news](#) - [alert](#)) an integrated, modular suite of contact center solutions for call recording, quality monitoring, workforce management, performance management, speech analytics and agent coaching. Visit <http://www.solutionmadeeasy.com> or call 866-596-EASY for more information on Solution Made Easy, Your One Stop Workforce Optimization Shop.*

## Overcoming The Old Headache Of Integration

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

The call center industry has historically put forward some very impressive technologies over the years. It's a marketplace full of practical innovation developed to serve the needs of the contact center. Why practical innovation? Because in other marketplaces, innovation happens first and needs are found to suit those innovations later. But the problem has always been that though solutions may have run well in a vacuum, it was the integration that caused the nightmares. (This was one of the biggest problems in the first round of CRM products in the late 1990s).

Though a call center may have owned and run half a dozen or a dozen terrific, worthy technologies, that center needed to hire a team of IT people to write a patchwork of programs that would allow the solutions to "talk" to one another. Even after all that expense and effort, the integration was shaky at best, and often acted as the albatross that dragged down the true productivity potential of the products. This "stovepipe" integration, were it a physical thing, would have looked like one half-aisle at Home

Depot, awkwardly held together by duct tape.

Today, integration is the tool that cuts contact center solutions free to soar to their full ROI potential. Many of the best tools available to call centers nowadays are extremely inter-related (or should be): they use the same data, they are handled by the same personnel, and they share the same goal: the raising of customer service quality and the simultaneous lowering of the costs that formerly turned the call center into large holes out of which profit flowed. They are easy to use and do not require a team of IT personnel standing by ready to act as technological midwives, translators, mechanics and emergency room doctors.

Going forward, it's not hard to see that integration will be the card trick every successful vendor must master, and the ultimate tool that every successful contact center must seek.

*The author may be reached at [tschelmetic@tmcnet.com](mailto:tschelmetic@tmcnet.com).*

# Twenty-Five Years Of Call Center Innovations: A Retrospective

When we began discussing this special 25th anniversary issue of *Customer Inter@ction Solutions* magazine, I knew we needed a retrospective: a sort of historical technological overview of this great industry, written by those individuals most closely involved with the development of the technologies that have made the call center industry what it is today.

It did not take me long to figure out where to go for this information: more call center innovators per square foot can be found at Aspect Software than nearly any other company in the industry. Aspect Software is today a family made up of individuals and organizations that were on the forefront of cutting-edge technology for the modern contact center. Following are the musings from three individuals from Aspect Software: Gary Barnett, Jim Mitchell and Roger Sumner. I hope you'll find these retrospectives as fascinating as we do.

— Tracey Schelmetic, Editorial Director, *Customer Inter@ction Solutions*



## The Contact Center Industry: Where We've Been And Where We're Going Next

By Gary Barnett, Chief Technology Officer, Executive Vice President Of Technical Services, Aspect Software

During the past three decades, we have seen a number of significant changes in the contact center industry – some have been technology-related, while others have been associated with business rules and processes.

From a technological perspective, in the early to mid-1990s, we witnessed the explosion of computer-telephony

integration (CTI). At the time, CTI was a great new technology that tied the contact center to the backend systems and enabled machine-to-machine exchanges. Before the advent of the modern contact center, when you called your favorite airline to book a reservation, your call would enter an automatic call distributor (ACD) and queue for





the next available agent. When you finally reached an agent, he or she would ask you questions and enter your information into the computer. The agent essentially served as the intermediary between you — the customer — and the contact center.

CTI simplified this process for agents, enabling the airline's system to identify your phone number on the network, send it to an interactive voice response (IVR) system for validation, and pop a screen with information about you for the agent to whom you would be connected. This automatic procedure drastically increased the speed at which companies could handle customer requests, greatly enhanced agent efficiency and resulted in more satisfying customer interactions.

As customer experiences improved, more people began to call contact centers. Inquiries became more challenging, agent skill sets became more complex and agent pay began to increase. At the same time, we saw a steady decline in the cost of both equipment and toll-free numbers. Labor was becoming the largest expense in the contact center and companies began to focus on better management of their workforces. We developed our workforce management application to meet our customers' needs to increase scheduling efficiency, maximize agent productivity, lower operating costs and streamline tasks.

After working to achieve more efficient labor costs through workforce management, many companies implemented self-service for additional cost-cutting measures. In the 1980s and 1990s, we helped a large number of our customers deploy touch-tone and voice automation systems that enabled them to divert calls from live agents. Their callers could now complete their transactions or obtain information by simply pressing buttons or "speaking" to automated systems. Both of these self-service options are still popular. However, forward-thinking contact centers are using



them to complement agent interactions rather than prevent them.

Today, we are beginning to help our customers secure and deploy open-source Internet protocol (IP) PBXs — an increasingly viable option for contact centers due to the growing adoption of session initiation protocol (SIP) and standards-based technology. We have seen, and are continuing to see, a huge shift from proprietary, closed standards to open standards. Contact centers are now starting to deploy open-source IP-PBXs to gain more flexibility and control over their applications and PBX-related operations.

We have seen a number of equally interesting business changes alongside the technological advancements. The rise of the Internet has had a significant impact on the way companies do business. Prior to the "information age," customers received most of their correspondence via postal mail, today known as "snail mail." They would call the phone number on the direct mail piece to get more information. Now, customers can surf the Internet, gather information related to various products

and services, then call the contact center, send an e-mail or click-to-talk for more information. This kind of tight integration across multiple communication channels is a new phenomenon in the past 10 or so years.

Another fairly recent development is the importance of the contact center as a key contributor to the overall bottom line. In the early days, contact centers were virtually hidden from C-level executives because they were viewed as cost centers. Today, they can be seen as true revenue generators.

Many of our customers are even taking this concept one step further. They are using the contact center to help them differentiate themselves by the quality of customer service they provide, as it has become more difficult to gain competitive advantage with products alone. For example, a large number of contact centers are now focusing on a holistic view into their customer's activities across the full organization to better improve the service being provided. In the past, you may have had to call different phone numbers at your bank for your checking account balance and

credit card information. That barrier has been broken down, and today you can call one phone number to both hear your checking balance and make an inquiry about a recent credit card purchase.

The integration of various systems and processes in contact centers has brought about much needed consolidation amongst contact center solutions providers. We knew that customers wanted a single vendor they could turn to for all of their contact center needs. We also knew that, in order to maintain our position as a major player and to continue to influence the marketplace, we needed to be a consolidator rather than a single product provider. We began acquiring various companies that offered solutions that complemented our ACD, such as workforce management, CTI, IVR and voice over Internet protocol (VoIP). It was natural to bring FirstPoint Contact, Concerto, Aspect Communications and others together to create Aspect Software and to begin uni-

fying the industry-leading products from these companies rather than to simply offer them as integrated solutions in a portfolio.

I've seen a number of innovations and achievements in the contact center industry during the past 25 years, but I strongly believe that the next 25 years will require even more radical and rapid change. A new generation of consumers and workers will soon enter the marketplace. They are dramatically different than any generation that has preceded them. This new generation is extremely mobile and on-demand driven — they are very adept at using tools such as instant messenger and text messaging. This new generation expects and demands immediate turnaround.

In the next 25 years, changes in the contact center will be driven by this new breed of consumer and their philosophies — no longer just by the technology. I look forward to being a part of this evolution and eagerly await the challenges that lie ahead. **CIS**

*Gary Barnett, a recognized industry luminary, has a distinguished history as a driving force in communications technology. He played a key role as a founding engineer at Aspect Communications ([news - alert](#)) in the development of the company's first automatic call distributor (ACD). Gary was also a founding engineer at Octel Communications, ([news - alert](#)) where he was one of the developers of the company's first voice-messaging system. In 1987, he became a founder of Prospect Software, ([news - alert](#)) a company that pioneered computer-telephony integration in the early 1990s.*

*Today, Gary is the Chief Technology Officer and Executive Vice President of Technical Services for Aspect Software, ([news - alert](#)) where he is responsible for corporate planning, product architecture and life cycle management, among other processes. Gary also ensures that customers receive the level of product support required to achieve their customer contact strategies in collections, customer service, and sales and telemarketing.*

# My Baby – The Predictive Dialer – All Grown Up

*By Jim Mitchell, Senior Vice President,  
Technology Office, Aspect Software*

The earliest predictive dialers, primarily located in banks, were extremely primitive standalone systems that were used for telemarketing or collections. These dialers required contact centers to go through the painstaking process of loading floppy disks containing the names and contact information for the people they wanted to call. Groups of

agents would physically sit next to the dialers in four-hour shifts.

The initial dialers didn't allow for updates and weren't integrated with any other systems. As a result, sometimes during their four-hour stints at the dialers, telemarketing agents would call customers who already owned the products or services they were trying to





sell, or collections agents would contact customers who had already made payments on their debt. Companies quickly realized that agents were wasting a lot of time on unproductive activities, and that customers became agitated when they received these unnecessary phone calls.

At that time, Davox was manufacturing and supplying terminals with telephones. Our clients included a number of financial services companies and, one day, a large bank approached us about the possibility of bringing their predictive dialing systems online. As this has always been a part of our history — helping our customers achieve their specific objectives — this was a challenge we gladly accepted because we felt we could help our customer fill this technological void. In retrospect, we see the impact that this decision made on the contact center, particularly in the sales and collections markets, which makes us proud.

Davox first approached Melita, a company that at the time was making big strides in the development of the predictive dialer, and told them that we wanted to partner to develop a full predictive dialing solution. We provided Melita with product specifications, and they subsequently became the original equipment manufacturer (OEM) for our design.

A few years later, in 1987, Davox bought TBS, the leading dialer company at the time, and together we launched Unison, a new, high-powered predictive dialer. Unison helped ensure that agents maintained a steady, busy pace throughout the day.

As with any new technology, the initial power dialers had some flaws. They would dial telephone numbers regardless of whether agents were available to handle the calls. When a dialer initiated a call and all agents were busy at the time the customer answered, the dialer would put the customer on hold until the next agent became available. The industry quickly learned that customers found

this practice to be annoying and intrusive. We refined the algorithms until they became significantly more precise, and we were able to help companies prevent contacting their customers and asking them to hold.

Drastic increases in efficiency — generally a 300 percent productivity improvement — encouraged many companies that were once solely focused on outbound contacts to use their predictive dialers to explore the possibility of call blending. Soon, we saw traditionally outbound centers handling inbound and outbound contacts with one agent pool and dynamically optimizing their agents based on inbound or outbound needs.

At the same time dialers were gaining in popularity, telephone call costs were declining. Companies that were looking for new and effective ways to market their products began to see the telephone as an extremely cost-effective tool. The number of companies making telemarketing calls was rising, while the number of telemarketing calls that companies were making was also drastically increasing. It didn't take long before consumers began to complain about the number of phone calls they were receiving.

As a result, in 2003, the Federal Trade Commission (FTC) stepped in to begin regulating telemarketing activities. They developed new legislation that required telemarketers to become more selective about who and when they were calling. The telemarketing community was suddenly forced to look into other applications to maintain their livelihood. They began working more closely with customers with whom they already had existing business relationships and abandoned their shotgun attempts to acquire new customers. In my opinion, this legislation has been a step in the right direction for the industry and for consumers. It has forced companies to constantly fine-tune their calling lists and has resulted in more contacts to the right people — people who want the products and services the companies are offering.



Predictive dialers have also been vitally important for collections. While the first dialers simply ran down call lists and contacted customers in the order their names appeared, today's dialers allow companies to reach out to their customers at the times that are most convenient for those customers. This process is one of many that have helped to drastically streamline the collections process.

We are now seeing a new use for predictive dialers: customer service, believe it or not. Many companies are using dialers for high-touch applications; for example, you might call your favorite retail store to place an order and ask the agent a question that he can't immediately answer, but he vows to find the answer and call you back. Rather than placing a reminder sticky note on his computer, the agent schedules your call-back with the predictive dialer. The dialer automatically initiates the return

call from that same agent at the time you specified and at the phone number you provided. You are guaranteed to get your callback, and when you do, your opinion of this retail store will most likely increase.

Some contact centers today are using predictive dialers to call their customers back when hold times are too long. Others are developing and implementing proactive customer care strategies. Take, for example, a large cell phone company. The company regularly contacts its new customers to make sure they understand the features of their phones, and simultaneously asks customers if they have questions about their service. These activities are geared toward improving customer satisfaction and retention rates.

We are beginning to see the integration of predictive dialers and text-to-speech capabilities as companies use their dialers to call their customers and then pass the calls to a speech self-service application rather than to agents.

Customers speak their responses directly into their phones, and the automated systems respond appropriately, engaging customers in "conversations." For example, if you're 30 days delinquent on a payment, a collections agency might call you and ask you for the last four digits of your social security number. You speak the digits into your phone. The system then asks you to submit payment and offers you the option to speak with an agent.

Just as we developed our initial predictive dialer to meet the needs of one specific bank nearly two decades ago, today we are working with our customers to continuously fine-tune our offerings. I am proud of our solid understanding of contact center technology, and even more proud of our customer and our industry knowledge.

We have certainly come a long way when it comes to predictive dialing. I have not only witnessed it, I have lived it. I envision even greater change on the horizon for companies that are always

looking for ways to improve the customer experience they deliver. I am proud to be a pioneer in this part of the market, but I also look forward to being a continuous innovator in the industry. Needless to say, I look ahead to the future with great anticipation. **CIS**

*Jim Mitchell is acknowledged as a pioneer of contact center technology and an authority on FTC and FCC telemarketing regulations. Jim has authored numerous articles and white papers and is a frequent speaker at industry events.*

*In 1981, Jim co-founded Davox Corporation, ([news - alert](#)) which became Concerto Software in 2002 and Aspect Software in 2005. ([news - alert](#)) Under his direction, Davox developed and introduced the Unison call management system, which helped to revolutionize the outbound dialing process and the contact center industry. As Senior Vice President of the Technology Office at Aspect Software, Jim plays an instrumental role in setting the technology direction of the company. He also acts as a customer advocate.*

# How CTI And Other Contact Center Technologies Changed My Life

*By Roger Sumner, Senior Vice President, Technology Office, Aspect Software*

I began working at Rockwell International in 1978 as a co-op while I was finishing my college education. At the time, the airline industry was extremely competitive. If an airline couldn't provide their customers with the appropriate information or could not answer their incoming phone calls quickly enough, their

customers were likely to conduct business elsewhere.

A few years before I joined Rockwell, Continental Airlines approached Collins Radio Company and requested the first real digital, intelligent call center. At the time, Collins was known to Continental Airlines as a reliable supplier of products and known to the airline industry as a





whole for its data packet switchers. Collins, which merged with Rockwell International in 1973, collaborated with Continental Airlines to invent Galaxy, the first intelligent automatic call distributor (ACD). The system was installed in Continental's Houston Reservation Center and was initially used to handle the airline's reservations and information calls throughout the Southern U.S., in addition to private automatic branch exchange (PABX) functions and management reporting. Galaxy was quite the invention: it triggered a chain reaction and launched a new industry, creating thousands of new jobs and most important, forever changing the way companies interacted with their customers.

We saw the next technological advancement in the late 1970s/early 1980s when airlines with contact centers in various cities wanted to divert calls from overly busy centers to underutilized centers. We worked with them to make geographically dispersed contact centers appear to customers as though they were one cohesive center. Overflow, which was based on agent availability and queue levels, allowed the airlines to look at their centers across the country and easily move calls to agents in different time zones without incurring expensive routing changes in their networks.

By 1982, we had invented some of the first notions of computer-telephony integration (CTI) in Cedar Rapids, Iowa, and deployed the technology for the Internal Revenue Service (IRS) for tax collections purposes. The task of the system was database look-up using CTI. For the first time, IRS agents were able to view delinquent taxpayer information on their computer screens and hit buttons to initiate calls to collect tax dollars that were owed. Shortly thereafter, we worked with directory assistance for one of the large telephone companies to implement CTI to decrease call lengths, key strokes and mistakes resulting from misdials and



redials. The new system enabled agents to hit buttons on their computer screens to transfer calls to an interactive voice response (IVR) system, which then gave callers the phone numbers they requested. Prior to the implementation of this technology, agents were required to manually dial telephone numbers for their callers.

CTI is, without a doubt, my favorite contact center technology. Over the years, it has allowed thousands of companies to deliver better customer service, and has enabled them to know more about the customers who are calling them. CTI brings data together in an appropriate place and allows applications to connect and exchange information with each other. It provides information to agents — the most important resource in the contact center — and gives them the ability to respond in the most appropriate way. CTI helps improve customer experiences by eliminating the need for customers to repeat information, and helps to decrease agent burnout.

There are also a number of exciting technologies we are now seeing emerge

in the contact center, including presence, session initiation protocol (SIP), voice over Internet protocol (VoIP), open-system IP-PBXs, as well as other new technologies that will change the way customers interact with companies. For example, we've developed speech applications that enable customers to "talk" to automated systems that make it considerably easier for customers to secure answers to their questions or complete transactions without needing to wait in queue for an agent.

Also, in the coming years, presence-based communications will greatly expand the role of the contact center to potentially incorporate resources across the whole enterprise, as well as change the notion of where agents are located and how customers can interact with companies. As session initiation protocol (SIP) becomes more widely deployed, communication links will be automatically established based on an agent's availability. This concept is powerful for the contact centers of the future because SIP-enabled presence detection can be applied to any tradi-

tional or non-traditional agent device that supports SIP, such as a PDA (personal digital assistant) or other handheld device. Presence will also be a key requirement for pushing customer service throughout the enterprise. This technology will change the dynamics of how agents are deployed in the contact center space, and how companies contact their customers in a proactive way.

Collins turned to us more than 30 years ago to help them meet a very specific need for something that hadn't yet been invented. We worked with them to make it happen, and we still do the same today.

We are dedicated to working with our customers to move them to new solutions at their own pace, when it makes sense for them and their businesses. The

products in which our customers have invested will continue to evolve and offer new capabilities. We're protecting their investments and showing them what they need to look at as they move forward. That is our heritage, and it is our future.

Having been a part of the contact center industry for nearly three decades, I am dedicated to personally helping customers figure out the best way to solve their business problems using the right technology at the right time. Everybody wants to know that they have brought some benefit to the world, and I take pride in being able to look customers in the eye and know that I have honestly made a difference in their businesses and the way they interact with their customers. **CIS**

*Roger Sumner is a recognized industry pioneer and author with more than two decades of experience in the contact center. He is the co-creator of the Aspect Spectrum ACD and also helped guide the development of the first truly open platform for contact centers. Roger also plays a significant role in overseeing and building Aspect Software's extensive patent portfolio.*

*Roger now serves as Senior Vice President of the Technology Office for Aspect Software, (news - alert) where he is an advocate for developing new technologies and solutions to enhance interactions between companies and their customers. He was previously the Chief Technology Officer and Vice President of Solutions Technology for Rockwell FirstPoint Contact, where he led the technological direction of the company and managed solution services and engineering while supporting the firm's business objectives.*

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# Using E-learning In The Call Center

Once a communications provider — wireline or wireless — wins a consumer, it must continuously deliver rich service experiences as a means to keeping that customer. The single most common point of contact is the call center. Ninety-two percent of customer transactions flow through the call center at a cost of \$8 to \$10 per call. Eighty-five percent of incremental revenues are initiated through customer calls.<sup>1</sup> Studies have shown that a customer who has a rich experience while having an issue resolved remains more loyal than a customer who has had no service problems.<sup>2</sup> Clearly, the call center, which is at the forefront of the provider-subscriber relationship, is critical to driving business objectives: customer retention and lifetime value. With millions of subscribers to serve and support, telecommunications companies must ensure that every contact center transaction is as efficient, productive and cost-effective as possible.

The most menacing problems in the call center are related to average call handling time (AHT) and first-call resolution (FCR) rates — the former being too high, the latter being too low, and the result being poor customer satisfaction which, in turn, contributes to churn and increased costs per subscriber. Where efficient, productive, high-quality customer service creates satisfied loyal users who buy more; poor customer service creates a vicious cycle of frustration, costly transactions and, eventually, customer churn. According to a 2003 J.D. Power & Associates study, the percentage of wireless subscribers who said they were likely to switch nearly quadrupled among those subscribers who rated their carriers' customer care below average.<sup>3</sup> In a separate study of approximately 20,000 complaints against U.S. carriers, top-cited criticisms included failure to rectify the problem, contradictory messages from the call center and rudeness.<sup>4</sup>

The primary culprits in the customer service crisis are overly complex and insufficient agent training. Agents must cope with a wide, ever-changing variety

of technical products as well as incredibly complex systems that manage customer data. Nowadays, it takes longer to get things done, especially if agents have not received adequate training on navigation of the call center's systems. This repeatedly puts agents in high-pressure situations in which they ultimately fail to solve problems. It's no wonder that subscribers don't feel "loved," which explains high agent turnover rates in the first year. Consequently, critical customer transactions are left to a constantly changing workforce that collectively possesses very little product knowledge or call center expertise.

What can telecommunications operators do about this? Industry research has shown that telcos can greatly improve call center efficiency, employee success and esteem, and costs by implementing e-learning programs that allow call center agents to rapidly acquire the skills and information they need to operate complex systems, stay up-to-date with

the technical products and services they support, and politely and consistently solve problems. By keeping call center agents in the loop, telcos can realize the improved customer loyalty and lifetime revenues they desperately need to survive in an increasingly competitive industry.

Employee training isn't a new concept. So why haven't we seen more success in the telecommunications industry? The answer is rapidity. Historically, training programs have lacked speed. Telcos cannot afford to wait. Technology and offerings change too fast and customer attention spans are too short. Traditional training solutions and learning management systems cannot keep up. Learning has to happen at the speed of business — responding to change quickly, effectively and comprehensively.

Enter e-learning. E-learning allows organizations to deliver faster, more contextual and cost-effective learning — whenever and wherever it is needed.<sup>5</sup> Network delivery makes it easy to roll out updated knowledge and track which call center agents have or have not

By Melanie Stoll  
Adobe Systems





reviewed it. Centrally archived content can be updated immediately and made current for all users. Agents can use low call-volume times to participate in self-paced training at their workstations to stay abreast of new offerings and develop skills for career advancement.<sup>6</sup> Newly learned skills can be put to practice immediately, which reinforces learning. And stakeholders can receive feedback on learner participation and knowledge retention.

So how do we successfully exploit these benefits? Following is a quick “hit list” for those organizations looking to cut to the chase with rapid e-learning for the call center.

***Enable individual contributors at any skill level to develop content.*** Developing compelling content need not be complicated. To shorten the process of getting training information from the people who possess it to those who need it, contact centers must leverage familiar tools and paradigms. A 2003 study<sup>7</sup> of

e-learning professionals found that PowerPoint was the second most frequently used tool for creating e-learning content. Why? It's practically ubiquitous, familiar to nearly everyone, and quick and easy to use. Virtually anyone can get up-to-speed quickly. So, unless a contact center has on-demand access to instructional designers, Web developers and IT staff supporting a full-blown learning management system, companies should keep it simple by leveraging readily available skill sets and familiar tools to create content quickly.

***Incorporate rich content to accelerate and enhance knowledge retention.***

Numerous usability studies have shown that multimedia presentations deliver maximum knowledge in a minimum amount of time while achieving the highest retention and recall rates. Used in conjunction with readily available and easy-to-use content authoring tools, a familiar medium like PowerPoint can be readily transformed from boring text

and bullets to engaging learning courseware complete with audio narration, graphics, quizzes, animations and simulations. These features are especially effective when the subject matter is complex or technical (such as communications technologies and service pricing schemes), and when your training goals stretch beyond simply broadcasting information to learning new skills (such as how to find and review a subscriber's call history) and achieving certifications. It's important to remember not to over-design, however; content should be user friendly and intuitive to navigate, not intimidating and frustrating.

***Make learning content accessible.*** The value and impact of rapid training dissolve instantly when learners spend more than five minutes attempting to join or log in to a training session. Training content should be readily accessible regardless of browser, platform or operating system. Find out what's required on the learner's end to partici-

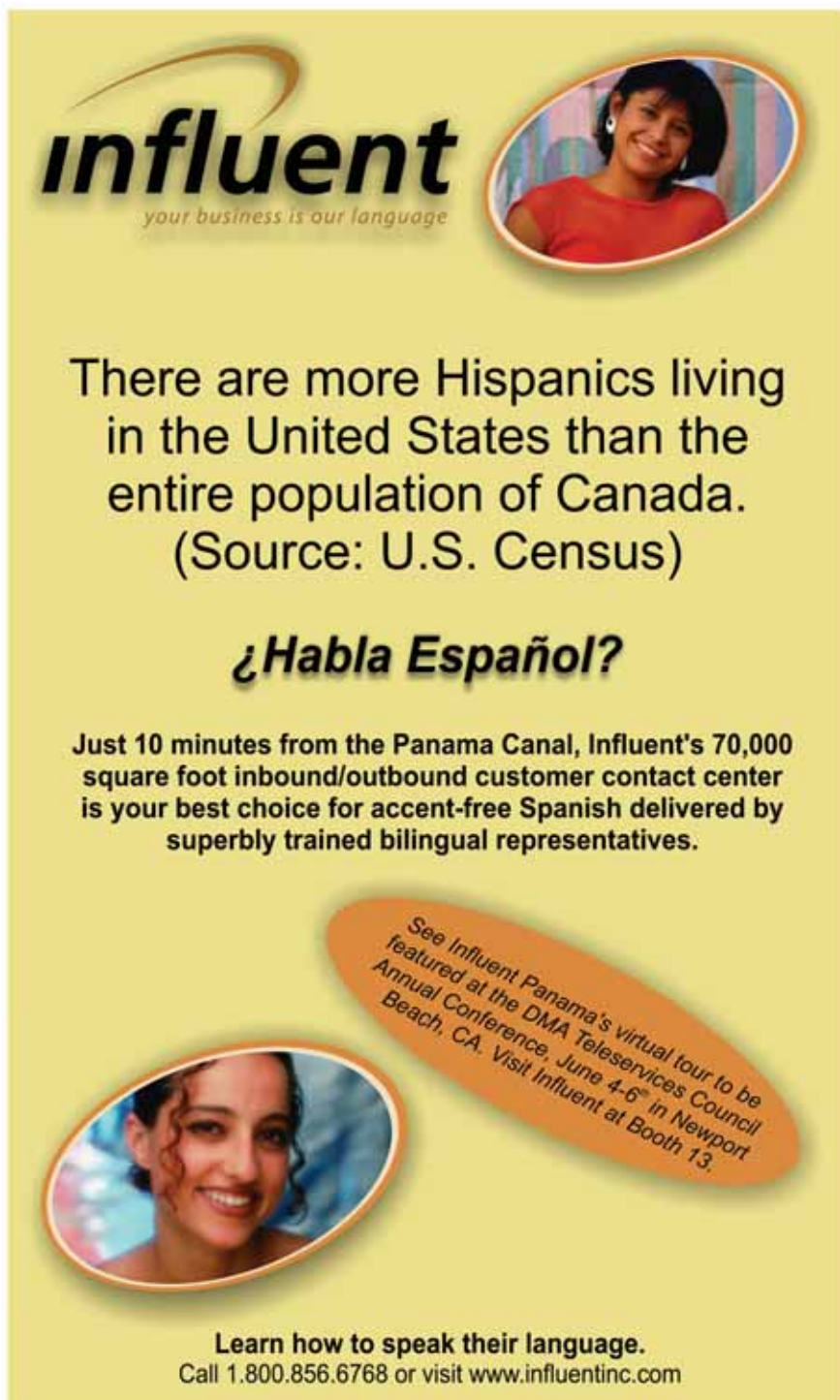


pate. Does the individual simply click on a URL, or must a client be installed? Which platforms, browsers and operating systems are supported? Factors such as client size and interoperability limitations can significantly impact how quickly and broadly rapid training ini-

tatives are adopted and accepted by learners, managers and executives.

**Measure and tie achievements to the business.** Only by measuring can contact centers justify the e-learning investment by tying it to achievement of learning objectives such as new product competency and reduced training costs. The

The primary culprits in the customer service crisis are overly complex and insufficient agent training.



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online aspect of e-learning makes it easy to track learner participation and performance, and report these metrics to key stakeholders in a timely manner. When tying e-learning investment and achievement to business goals such as customer satisfaction and increased sales, it's important to establish metrics and consistently measure before and after the e-learning initiative is implemented.<sup>8</sup> Short-term value, such as training cost reduction, can be measured as a one-off, but to illustrate long-term and recurring value and encourage ongoing investment, contact center organizations must dedicate a little more planning and commitment. **CIS**

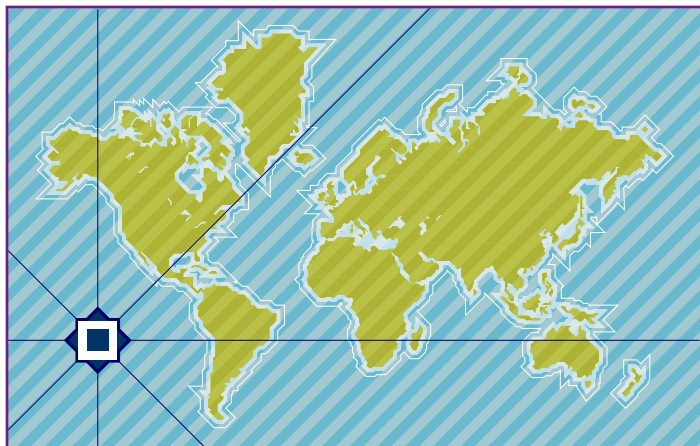
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# Things to Consider When Buying A Workforce Management Solution

As the role of the contact center within the enterprise continues to expand, workforce management (WFM) has emerged as one cornerstone in an overall optimization strategy. As a result, WFM solutions and other contact center software applications are undergoing unprecedented and accelerated changes. This leaves administrators with the challenge of finding the right blends of technologies to meet the specific needs of their organizations.

Traditionally, WFM has been recognized as a tool that automates and improves call center forecasting and scheduling activity. Today, WFM solutions introduce “agent-pleasing” capabilities and enable access to a remote workforce without the need for costly software and hardware infrastructure. These technological advances allow for the most skilled agents — regardless of their locations — to be optimally scheduled at the most strategic times to maximize the workforce.

As WFM continues to evolve, it is playing a more strategic role for enterprises looking to maximize the business value of their contact centers. There are many WFM solutions available, so it's important to avoid the danger of “information overload.” This, ironically, leads to poor decisions, so organizations must carefully evaluate their individual needs and align them with specific products and feature sets.

## Make An Impact With Your WFM Solution

Being effective requires us to create new metrics that better connect to the enterprise. It is important to educate other enterprise departments about what the contact center does today and what it could do tomorrow if so tasked

and resourced. Centers are in the middle of a rich dialog involving customers: current, returning and defecting. Other departments may already be paying for or desperately seeking information that the contact center can capture, distill and deliver. This game plan places a greater burden on agents. Training, development and coaching for appropriate behaviors will be key factors for success.

Too often, applications are fragmented and stand-alone; they do not work synergistically with the complete contact center technology infrastructure. Using a pre-determined set of criteria can help an enterprise select a WFM solution that will best suit the company's specific contact center needs. To thoroughly evaluate potential applications, organizations must focus on the following categories:

- Ease of Use
- Forecasting Flexibility
- Proficiency-based Scheduling
- Agent Self-Management of Preferences
- Agent Self-Management of Schedules

- Long-range Planning
- “What If” Functionality
- Real-time Agent Adherence
- Exception Management
- Performance Management
- Strategic Consulting Services

Strength in these 11 categories must reflect both the quality of the WFM solution as well as the company providing it. Understanding why each is important can help enterprises move beyond the simple comparison chart to pinpoint an effective WFM application able to anchor the successful contact center.

## Ease Of Use

Although “ease of use” remains one of the industry's most overused buzzwords, it is critical that when customers begin to use any software, they find it to be highly intuitive and very straightforward. This simple difference shortens the learning curve and enables organizations to realize a quicker return on their investment.

Because WFM software has evolved in recent years, some solutions have simply added layers upon layers, making them inherently more complex. Applications that are difficult to learn often become underutilized or even abandoned as the job function moves

By Bill Durr  
Witness Systems, Inc.





from person to person over time. Solutions that are truly easy to use generate more success over a longer period of time.

### Forecasting Flexibility

Forecasting accuracy is the most cost-effective method for achieving desired contact center results. Typically, the better the forecast, the better the schedules will deliver against service level goals. When evaluating WFM solutions, companies must consider the range of flexibility in forecasting capabilities.

For example, many WFM applications provide a forecasting engine tied to recent history (typically 13 weeks). Users can re-weight those weeks, but that is the extent of control. Some WFM solutions allow enterprises to

build their own forecast model by creating a “template” of weeks, using any week in the entire history database. Because more accurate forecasts are highly desirable, greater flexibility empowers forecasters to find the models that are most accurate for each of their specific contact center environments.

### Proficiency-based Scheduling

Scheduling in a non-skill-routing environment is relatively straightforward, with few differences among the various vendors. The situation is much different in a skill-routing environment, as are the associated scheduling needs. A set of schedules generated for a skill-routing environment requires an application that can process detailed infor-

mation about agents. The more information the WFM application can process, the more accurate and precise the results will be. Therefore, it is important that solutions are capable of defining each associate individually with respect to their proficiency within various skill sets.

Many WFM applications require users to define agents as members of skill groups. Agent performance within the group is aggregated and averaged, and the resulting score is applied to all members. However, because agents perform quite differently from one another, this type of scheduling creates undesired variations in actual service levels. This forces management to focus on service levels instead of productivity and quality. WFM solutions should provide



insight into the performance capabilities of each agent to achieve greater scheduling precision in matching the workload with the workforce. This can drastically reduce variances in service level from one time of day to another.

### Agent Self-Management Of Preferences

Many WFM vendors preach agent empowerment. This includes making use of agent preferences in schedule generation as one way for agents to influence the scheduling process. Schedule preferences are driven by the demands of everyday life, and without having direct control over their schedule preferences, agents must interact and request that the changes be made on their behalf. This forces contact centers to add middle management staff to handle the work. It also causes supervisors and team leaders to spend their time performing simple administrative tasks instead of coaching their teams.

WFM applications should provide agents with direct management and control over their schedule preferences from a standard Internet browser. Giving agents greater control over the scheduling process improves morale, employee buy-in and agent retention. It also frees team leaders and supervisors to spend their time on activities that impact the contact center's performance goals.

### Agent Self-Management Of Schedules

The second component of agent empowerment is to permit staff members to engage in their own schedule management through "shift-swaps" and trades. The Web-enabled, self-service scheduling model discussed earlier allows associates to more easily switch shifts with colleagues. Because agent empowerment is essential for maintaining morale, WFM solutions should be equipped with these capabilities.

Even in the most successful contact center environment, some agents will

not receive schedules that meet personal needs from time to time. Like self-managing scheduling preferences, providing an easy mechanism that permits them to swap or trade shifts improves morale, increases agent retention and frees supervisors and team leaders from low-value administrative tasks.

### Long-Range Planning

Basic long-range planning tools equipped with some financial data — including average wage rate — are common in most WFM solutions. However, many of these tools lack applications that support the decision-making process for contact center management teams. Long-range planning requirements extend far beyond simple monthly projections of historical data into the future.

True long-range planning tools are designed to permit management teams to arrive at logical, well thought-out conclusions to challenging questions. These questions include decisions about what skills should be cross-trained to maximize the training budget or the number and skill-profile of agents who may be required 18 to 24 months down the road. Long-range planning must be done with greater precision and accuracy to avoid putting the contact center into a "can't win" budget constraint situation.

### What If?

Every WFM solution provides a "what if?" function. This permits management to alter the forecasting and scheduling environment in various ways to identify alternative scheduling outcomes. For example, what may happen if call volume increases in a particular queue or if a particular shift is added to the schedule? Comprehensive WFM applications allow users to create profiles of fictitious agents with respect to skill mix and schedule preferences. These profiles can be used in "what if?" scheduling, especially when blended with profiles of existing agents to achieve optimum aggregate schedules.

**As WFM continues to evolve, it is playing a more strategic role for enterprises looking to maximize the business value of their contact centers.**

The output of creating a "what if?" scenario provides information about what agent profiles — and how many agents that fit the particular profile — are required to achieve lower labor costs and more consistent workload matching. Contact center managers can then seek to hire agents for the newly profiled shifts. Hiring new agents with specific shifts in mind improves the focus in the recruitment process and avoids the premature agent turnover that typically results from unmet, unspoken expectations on both sides.

### Real-time Agent Adherence

Another important component of a WFM solution is a real-time agent adherence (RTAA) function. The inherent flaw with RTAA is its ephemeral nature. For example, when an agent falls out of schedule adherence, the agent's name and exception condition is displayed on a screen after exceeding a pre-determined threshold. However, when the agent returns to adherence with the schedule, the name disappears from the screen. This "here and gone" display forces contact center management into an unproductive, inefficient, reactive mode.

WFM solutions should provide real-time rolling agent adherence and exception display, so when an agent is out of adherence, the team leader or supervisor can view the agent's adherence history, not just a snapshot of current status. A real-time, historical view enables perspective and sharpens assessment by providing deeper and richer adherence information.

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Mark Geremia is the Product Marketing Manager for Nuance's speech-enabled auto-attendant product line. He is responsible for planning and executing marketing activities that increase awareness of the benefits that SpeechAttendant and OpenSpeech Attendant provide to an organization. Prior to joining Nuance in June of 2005, Mr. Geremia worked at Unveil Technologies as a Marketing Manager promoting the Unveil Conversation Studio. Mr. Geremia holds degrees in Marketing and Business Management from Bentley College.

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RTAA can be a valuable tool when used in a positive way within a coaching-oriented environment. Ordinary RTAA fosters reactionary management and resentful agents, but an effective WFM solution should provide a more rational, deliberative RTAA functionality that enables supervisors to coach rather than react.

#### Exception Management

When RTAA capabilities are present, it is also critical for WFM solutions to possess exception management func-

tionality. In any contact center environment, no matter how well-run the operation may be, agents will deviate from their schedules. These deviations are sometimes deliberate on the agent's part, sometimes accidental and sometimes caused by customer needs. WFM systems that have RTAA implemented capture and generate fairly significant numbers of agent exceptions.

Effective WFM solutions enable team leaders and supervisors to differentiate among these various exceptions by approving those particular schedule deviations associated with positive behaviors. This level of control rewards positive agent behavior (even if that behavior causes a schedule exception) while preserving the schedule exception. Because agent shrinkage is one of the fundamental measures and focuses of management attention, it is important that the exception management capabilities of the WFM application isolate and identify sources of shrinkage with greater precision and accuracy, enabling management to better control costs.

#### Performance Management

For decades, the core offering of any WFM solution has been forecasting and scheduling. This is somewhat a contradiction of terms because forecasting and scheduling are focused on deployment of resources rather than the actual "management" of these or any other resources. As contact centers and WFM applications evolve, a new term has been injected into the lexicon to reflect the need to insert the management component back into WFM: workforce optimization (WFO).

WFO solutions drive efficiency and effectiveness throughout the contact center operation by establishing clear objectives, goals and key performance indicators. They also create a consistent daily feedback process to everyone in the center. In addition, formalized and controlled benchmarking information permits centers to align themselves with the performance characteristics of the world's best operations.



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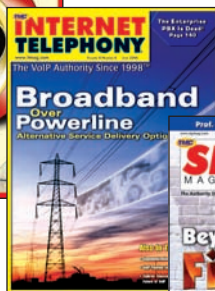
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Performance management solutions and processes drive individual agent performance improvements. The best WFM solutions will have a WFO component to complete the loop: performance management improves performance on an individual basis.

#### Strategic Consulting Services

In addition to the functional features of a WFM solution, it is important to consider the availability of services and support beyond simple software installation. During the installation process, some vendor representatives will make process and procedure recommendations based on their experience. For many vendors, this is the extent of their strategic consulting services. However, because WFM plays such a crucial role in the contact center and, as a result, in the enterprise as a whole, a comprehensive consultation can help organizations maximize the return on investment for the WFM solution.

One of the more important consulting services that a WFM vendor should offer is guidance for creating scheduling solutions that meet business objectives, respect employee requirements and support health and safety in the workplace. This can assist contact center management teams develop agent-pleasing scheduling choices that generate hundreds of thousands — and sometimes millions — of dollars in labor savings. Many contact centers still offer very little in alternative scheduling choices and rely on inefficient block scheduling that drives labor costs needlessly high. A WFM vendor's consulting services can provide assistance in implementing alternative scheduling practices to detract from this trend.

Because contact centers have evolved into critical, revenue-generating components of the enterprise, organizations must ensure they have the right technologies and process in place to achieve desired results. Workforce management is one of the most important elements

Because contact centers have evolved into critical, revenue-generating components of the enterprise, organizations must ensure they have the right technologies and process in place to achieve desired results.

of a contact center's technology infrastructure, so selecting a solution is not a task to be taken lightly. With diligent analysis of existing applications, organizations can ensure that the WFM solution they select will cost-effectively align with their specific business needs. **CIS**

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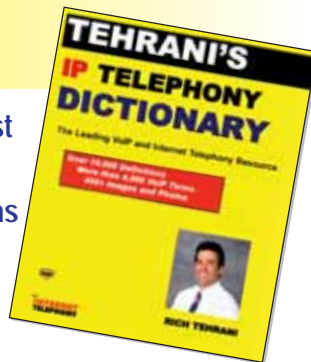
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By Tracey E. Schelmetic  
Editorial Director, Customer Inter@ction Solutions

## Looking Toward The Future



During the recent gala event celebrating Customer Interaction Solutions' 25th Anniversary and awarding the Top 50 Teleservices, MVP Quality and Lifetime Achievement Award winners, one recipient commented, after hearing about the accomplishments of the early tele-services pioneers, "I've only been in this industry for 18 years...I guess that makes me a rookie." Well, if he's a rookie, I'm still a trainee. But still, after eight years in the call center industry, I've seen a lot happen.

It helps that it's a fast-moving marketplace, as are most computer-based industries. We're all used to buying the latest and greatest cell phone or video game console, only to have it be obsolete by the time we get it home and out the box.

But if you'll excuse my mere four-fifths of a decade experience, I'd like to share some thoughts about the call center as it moves toward the future. I would have liked to title this column "The Next 25 Years," but I figured that was pushing it: considering that this is technology we're talking about, most of us industry writers realize we'll be lucky to predict the next five years with any confidence.

Twenty-five years into the future, we might be writing about the exciting new media for customer communications: voice-over-mental-telepathy, self-service through thought amplification, cyborg call center workers and data dissemination via wireless brain link to collective consciousness data banks.

So I'll be safe and stick to the next five years.

### Standards-based Solutions And Integration

The call center industry is starting to slough off the bad habits exhibited by the wireless industry. The wireless phone industry has not yet realized that competing standards and networks do no one any favors, including themselves. Or maybe the industry does realize this, but it has its fingers in its ears, like a child humming to itself to prevent having to face the news of an impending doctor's visit or a trip to weird Aunt Gertrude's house.

When it comes to a choice between a few mega-solutions or numerous bits n' pieces solutions, I like to sit in the middle. Having only three giant call center companies will not serve the best interests of this industry. Alternatively, I hope we don't return to the late 1990s, when there were so many small, disparate solutions that, by the time you got your call center fully equipped, it looked like a technological Frankenstein. Your finished product looked like a giraffe or a platypus...two animals so absurd that, as the old adage goes, they must have been designed by committees.

I'm therefore glad to see a rise in the trend of complementary solutions providers integrating their offerings, eliminating the need for armies of IT people to find a way to fit a square peg into a round slot, and I'm confident we'll see a lot more of that in the near future.

### Wider Acceptance Of Natural Language Processing

I am a big fan of advanced speech technologies. The slow adoption of the technology, however, has made me fret that natural language processing is the "Technology Of The Future"...and always will be.

Nowadays, when I quiz call centers about their shyness regarding speech, I often hear two reasons: price and complexity. Early (and many current) speech applications were not only out of reach of most companies in terms of cost, they were extremely difficult and cumbersome to administer. (Many companies feared troubleshooting speech solutions

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would be like being forced to do trigonometry problems in Roman numerals at 1:00 am after three margaritas.)

Many speech providers today are beginning to realize this, and are turning their solutions into more bite-sized pieces rather than nine-course meals. Just as the CRM providers discovered they would not have real commercial success unless they began simplifying and reducing costs for the SMB market, the same is happening with speech, and I'm confident that five years from now, we'll be starting to see small call centers and even small businesses using natural language self-service and auto-attendants.

#### Expanding Usage And Applications For IP Business Applications

I am immersed in telecommunications innovation for most of my waking hours, yet periodically I'm still amazed at the kinds of applications that can be tackled via IP. Right now, we like to say, "IP is not just about cheap phone calls." Five years from now, I think we'll still be discovering business applications, and making statements such as "IP is not just about cheap phone calls, application access and sharing, virtual and home-based agents, disaster recovery, customer-to-agent video, always-on customer service, solutions hosting, on-demand applications, 100 percent continuity across the business and partner enterprise, global resource sharing, foreign business development, learning and training, video conferencing, long-distance healthcare and immersion entertainment."

#### More Efficient Call Center And BPO Staffing And Outsourcing

We're starting to hear stories like this one: Company A sells pool toys, lawn furniture, sprinklers, shade umbrellas and tiki lanterns. Company B sells sweaters, slippers, decorative tchotchkes, holiday decorations and flannel dog beds. When Company A is operating queues at full-tilt early in the summer season, the agents of Company B are playing their 395th game of computer solitaire. When shortly after Thanksgiving the agents at Company B become too busy to think, the agents at Company A are making record-breaking

paperclip chains and attaching binder clips to their fingers and waggling them at one another. Wouldn't it make sense for these two companies to partner and, in effect, "lease" their agents to one another during times of need? Variations can happen not only during different times of the year, but even daily: many people balance their checkbooks or do their financials during the day, which keeps a financial services call center busy from 9:00 am to 5:00 pm, but fairly quiet in the evening. On the flip side, consumers are more likely to surf for shopping purposes in the evening, spiking the call and e-mail volumes for those types of consumer companies after 6:00 pm. IP call center solutions make agent-sharing incredibly easy, and it can help raise the efficiency of call center operations exponentially.

#### Self-Service That Suits The Customer, Not The Vendor

Let's face it...in the early days, the term "self-service" applied to a concept that actually meant, "If we throw some information onto a Web page and force our customers into our IVR, maybe a few less of them will call, and maybe they'll go away, and maybe the fallout in lost customers and revenue won't start to hit the fan until I've quit and taken a new job."

Self-service IS a wondrous concept, but it needs to be built to work well for the customer, not as a ruse to make customers go away. Many people prefer to be able to answer their questions with no human intervention. But today there are still too many shoddy consumer Web sites, unanswered customer e-mails, FAQ lists last updated in 1997, dated and useless auto-replies to e-mails and terminally frustrating IVRs. Self-service is truly a "garbage in, garbage out" technology. I look forward to a time when companies begin to compete on both their stellar self-service capabilities AND their live support.

So let's check back in 2011 and see how we did. Perhaps by then, you'll be able to see me deliver my June 2011 editorial via video on your personal communication device; though to be honest, I find the potential for a "bad hair day" to interfere with my prognosticating a bit daunting. **CIS**

The author may be contacted at [tschelmet@tmcnet.com](mailto:tschelmet@tmcnet.com).

**I am immersed in telecommunications innovation for most of my waking hours, yet periodically I'm still amazed at the kinds of applications that can be tackled via IP.**





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