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May 2006 • Vol. 24/No. 11
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A fully-integrated workforce
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See inside cover flap or page 22

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May 2006 • Vol. 24/No. 11
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CRM Data Security

Ensuring Your Customer Data Are Safe

Mother's Maiden Name

Social Security Number

Credit Card Number

Home Address

Phone Number

Date Of Birth

Mother's Maiden Name

Social Security Number

Credit Card Number

Home Address

Phone Number

Date Of Birth

Mother's Maiden Name

Social Security Number

Credit Card Number

Home Address

Phone Number

Date Of Birth

Mother's Maiden Name

Returning Customer
Email Address
Password
Forgot your password?

Also In This Issue:

- CRM Excellence Awards, Part I
- In The Boardroom with Nuance CEO Paul Ricci
- VoIP Call Recording
- Lifetime Achievement Award Winners Announced

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For decades call centers focused on efficient call routing. That however, is the old rule—and just the starting point. The new rule is agent *effectiveness*—using technology to make today's contact center agents more effective at handling calls as well as e-mails, Web inquiries and other interaction types. To boost bottom lines.

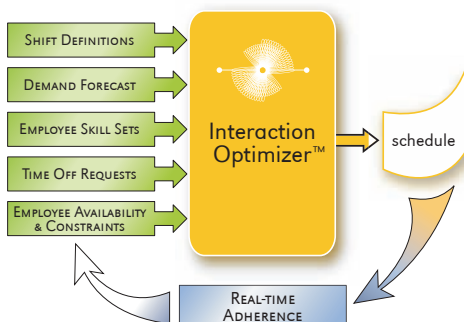
But if you can't manage workforce schedules, agent skill sets and availability to meet demand...

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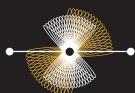
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By: Nadji Tehrani,
Founder, Chairman & CEO, Editor-in-Chief,
Technology Marketing Corporation

Countdown To The 25th Anniversary (June 2006) Issue



Recognizing Industry Pioneers With Lifetime Achievement Awards

When we launched *Telemarketing*[®] magazine in June of 1982, there was no such thing as telemarketing, contact centers or a CRM industry. In fact, after the second issue, there was nothing to write about. As I indicated in my April 2006 editorial, the magazine editor came to my office and said, "I can't find anything to write about...are you sure this is an industry?" I replied, "No, I am not sure, but we will make it an industry." With a tagline that read: The magazine of ELECTRONIC MARKETING and Communications...how could you possibly fail?! Yes, we worked very hard gathering information to educate our global readers and tried to make it an industry. We would go anywhere to find success stories with which to encourage the world to use telemarketing...this new, out-of-the-box, evolutionary idea to generate sales (outbound) and to handle customer service (inbound).

Building The Industry Was A Team Effort

It has been said that, "Nothing great is achieved without great team work armed with a positive, can-do attitude!!"

**"Nothing great is achieved without
great team work armed with a
positive, can-do attitude!!"**

We were fortunate to have many outstanding leaders, visionaries and competent managers in our emerging

industry. They each contributed tirelessly, vigorously and relentlessly to make it all happen.

I was fortunate enough to work shoulder-to-shoulder with these outstanding leaders. Honestly, without their significant contributions, there would be NO industry!

We figured that, as the industry's pre-eminent magazine since 1982, it is our paramount responsibility to recognize those industry leaders by honoring them with a "Lifetime Achievement Award" during our 21st Annual Top 50/MVP Quality Awards Dinner Meeting.

I should point out that, without question, there are a considerable number of other outstanding contributors to our



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industry and, given the available time and space, we were unable to appreciate all of the contributors to our industry's success at this time. Hopefully, we will locate those individuals for recognition in future Top 50/MVP events. Consequently, I sincerely hope that they will understand.

Having said the above, I would now like to describe the contributions of a few of the leaders with whom I have had close relationships during the past 25 years. Tracey Schelmetic, Editorial Director of CIS magazine, has contributed significantly to the selection of the winners and has already prepared complete biographies, including the achievements of the award winners, which you will find on page 36. (Part two of these biographies will appear in the June 2006 issue.)

Here are Some of the Outstanding Visionaries and What They Have Done for our Industry:

1. The Omaha Group's Contributions Were Truly Vital To The Industry's Success And Development.

Shortly after we launched *Telemarketing*® magazine, which has now evolved into *Customer Inter@ction Solutions*® magazine, I discovered that it was necessary for me to travel to Omaha, Nebraska to learn from the leaders in that town. Therefore, in 1982, I traveled to Omaha, which was known as "the capital of telemarketing" in America, to learn from the leaders. While I was in Omaha, I met a dedicated young man named Ray Golden who took a major interest in my education. In fact, he took one week away from work simply to drive me to visit various industry leaders and to make sure that I received a proper education about the basic principles of inbound and outbound telemarketing. I must state categorically that the informa-

tion that I gained by traveling to Omaha was vitally important to the future success of the industry and our publication, *Telemarketing*®.

2. Mary and Gary West Literally Went Out Of Their Way To Educate Me By Introducing Me To Every Department That Made Telemarketing Function Effectively.

Mary West of West Corporation is particularly appreciated for literally guiding me from department to department and making sure that I got the appropriate education. Needless to say, I am enormously grateful to Mary and Gary West for their contributions toward my education at the highest quality level available at that time. Mary and Gary West were founders and senior executives of West Corporation, which is one of the leading and most prestigious, respected and diversified teleservices outsourcing companies in our space.

In subsequent visits to Omaha, I again met with the above individuals and continued the learning process with other highly respected industry gurus. As a matter of fact, the methodology that we use today in determining the Top 50 inbound and outbound compa-

3. Steve and Sheri Idelman Also Contributed Significantly To My Outbound Education.

I am also gratefully indebted to Sheri and Steve Idelman, who spent considerable time educating me about the principles of outbound telemarketing, in particular.

Steve and Sheri Idelman were the founders of ITI Marketing, which became the number one outbound teleservices company in less than five years. To the industry, Steve and Sheri were known as the King and Queen of Outbound.

The Idelmans also contributed immensely to the development and progress of the contact center industry.

Everything Steve and Sheri touched turned into GOLD! For example, Steve acquired a CBA basketball team called The Omaha Racers. Within one year, Steve turned that team into the champions of CBA basketball!!

4. Convergys Also Deserves Significant Recognition.

It goes without saying that *Convergys*, ([news - alert](#)) along with West Corporation, are without question the industry leaders in the outsourced teleservices business.

**The magazine editor came to my office and said,
"I can't find anything to write about...are you sure this is an industry?" I replied, "No, I am not sure, but we will make it an industry."**

nies, which we have done for the last 21 years, was originally recommended to me by Gary West, Founder and Chairman of West Corporation. Once again, I acknowledge their contributions and I am gratefully indebted to them for their dedications to our industry's progress.

Convergys has been a true leader in outsourcing, consulting and software solutions over many years, and I have had the great pleasure of working closely with them during that time. Convergys combines the industry experience it has earned after more than two decades in the teleservices industry with

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cutting-edge software, operational expertise and world-class call center facilities to help its clients create valuable relationships with their customers and employees.

Customer Inter@ction Solutions® recognizes Convergys as one of the industry's most valuable contributors to outsourced customer care, HR business process outsourcing (BPO) and billing solutions and service.

5. Gary Taylor, Chairman of InfoCision Management Corp., Also Merits Outstanding Recognition.

I have had the great fortune of knowing Gary Taylor for approximately 20 years. I recall Gary visiting our Telemarketing and Business Telecommunications (TBT) trade shows in the mid 1980s and acquiring technology for his call centers back then. Since that time, as we all know, he has established InfoCision Management Corporation, which has earned MVP Quality Awards every year since the award's inception in 1993. It goes without saying that no other company has earned that many primarily Gold and a few Silver awards. At the moment, InfoCision ([news - alert](#)) not only has one of the highest quality teleservices operations in the world, but the company is also enjoying significant annual growth.

Four-Year College Education To Legitimize Our Industry

What truly distinguishes Gary from many others is the fact that he has contributed 3.5 million dollars of his own personal money to the University of Akron to set up the Taylor Institute For Direct Marketing. The primary objective of this Institute is to develop a four-year college program to train and educate the future leaders of the contact center/direct marketing industries and, as such, Gary Taylor has brought the greatest credibility and legitimacy to our industry. We believe this dedicated personal contribution of Gary Taylor and his wife Karen deserves tremendous recognition and appreciation by the

entire industry.

6. Aspect Software Also Deserves Recognition For Their Unsurpassed Achievements.

As you may know, this company started out by the name of Davox Corporation, which made great contributions to our industry under the leadership of Al Lucchese, former Chairman and CEO, who was inducted into the Hall of Fame by *Customer Inter@ction Solutions*® magazine nearly 10 years ago.

The company subsequently made several acquisitions and eventually was named [Concerto Corporation](#). ([news - alert](#)) A few years ago, Jim Foy, the outstanding CEO of the company, joined Concerto, and upon accepting the job, he stated that in a few years Concerto would be a billion-dollar company. Sure enough, not long ago, Concerto acquired first Rockwell's ACD division and then acquired Aspect Corporation for one billion dollars. Thus, the new combined organization became Aspect Software.

Today, Aspect Software positions itself as the world's largest supplier to the contact center industry and, as a result, the company, as well as Jim Foy, Gary Barnett, Jim Mitchell, Ralph

All industry insiders who have been around 10 or more years remember what a great company Brock Control Systems was. Brock Control Systems was fortunate enough to have a visionary and ambitious CEO, Richard Brock, who in a relatively short period of time made this company the number one provider of contact center automation software with better than 80 percent market share! Richard Brock not only had a great understanding of the technology and the needs of the industry, but he also understood marketing, perhaps better than anyone at that time. Richard dominated every one of the TBT shows (the industry's leading convention, sponsored by TMC) and, as such, every attendee understood and respected Brock Control Systems for being a true technology leader. One of the outstanding ideas that Brock Control Systems implemented was as follows: as soon as a sales lead was obtained at one of the TBT shows, that potential customer (included in the sales lead) would receive a proposal from Brock Control Systems via Federal Express in his or her office the minute he or she returned from the TBT convention! In short, Brock contributed tremendously to the automation of the contact center industry. I also

I was fortunate enough to work shoulder-to-shoulder with these outstanding leaders. Honestly, without their significant contributions, there would be NO industry!

Breslauer as well as the entire Aspect Software team deserve tremendous credit for having built such an outstanding company.

7. Richard Brock, Chairman And CEO Of The Former Brock Control Systems.

consider Richard Brock to be a marketing genius, exceptional leader and entrepreneur's entrepreneur!

8. Joe Porfeli Took EIS To The Highest Level Ever.

[EIS Corporation](#) ([news - alert](#)) actually started on the south side of

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Stamford, Connecticut, with a relatively small group of employees — under 12 people. Selection of Joe Porfeli as the CEO of EIS Corporation was, in my humble opinion, the most important decision the founders could have made.

Joe helped to grow EIS from a small, relatively unknown organization to the most respected company with by far the largest market share when it came to predictive dialer manufacturing and sales. The company grew from approximately a dozen people to in excess of 150 employees. Once upon a time, under Joe Porfeli's leadership, the company supplied predictive dialers to 80 percent of the Top 50 teleservices companies, not to mention many other in-house enterprise users. EIS, in a relatively short period of time, gained global recognition, helped the industry grow and was extremely profitable.

In 1982, I traveled to Omaha, which was known as “the capital of telemarketing” in America, to learn from the leaders.

The Meetings At Il Falco Restaurant

I was fortunate enough to be a close friend of Joe Porfeli and, having lived in the same town where EIS was headquartered, it was easy for me to have the great pleasure of having dinner with Joe Porfeli at Il Falco restaurant every month! What is more important is that I used to take a yellow notepad and plenty of pens with me to these dinners, and I would always emerge from the meeting with a notebook full of great management ideas and lessons

from the master! It was as if I had attended a graduate business course at Harvard. Frankly, what I learned from Joe Porfeli about management, they don't teach at Harvard! There are those in our industry who refer to Joe as the “Jack Welch of our industry” and frankly, I don't see any reason to disagree with them! Because of these great contributions, he also deserves a Lifetime Achievement Award.

Please expect to see a full report on the awards dinner ceremony for the Top 50/MVP recipients in the June issue of *Customer Interaction Solutions*® magazine.

By the way, the June issue, which will be our 25th anniversary issue, will be spectacular in terms of content, design, etc., and like the first issue of *Telemarketing*® magazine, it will also be a collector's item!

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

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IMPORTANT:

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

Congratulations To The 2006 CRM Excellence Awards Winners, Part I

For the seventh consecutive year, the editors of Customer Interaction Solutions dared readers to prove that their companies have what it takes to win the coveted CRM Excellence Award. Below is a list of winners to be highlighted in Part One of our coverage (Part II will be presented in June 2006). I offer my congratulations to the winners!



1 2 1 Direct Response	Centive	Epicor Software Corp.
Alorica, Inc.	Chordiant	etalk
AMC Technology	Software, Inc.	eTelecare Global
Amcat	Citrix Systems	Solutions
Amdocs	ClientLogic	Excell Services
Antenna Software	Cross Country	FrontRange Solutions
APAC Customer	Automotive Services	IEX Corp.
Services Inc.	Customer Direct	InfoCision
Aplicor	Echopass	Management Corp.
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For 25 years, Customer Inter@ction Solutions magazine has been the voice of the call/contact center, CRM and teleservices industries. We've been often imitated, but never equaled. We have watched the industry germinate, grow, mature and prosper, and we've been extremely instrumental in helping it do so.



CUSTOMER RELATIONSHIP MANAGEMENT

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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 One 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 II of the list will be presented in the June 2006 issue.)

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By Xavier Van de Lanotte, VXTConsulting, Inc.

Customer relationship management (CRM) is grabbing the attention of business leaders who wish to instill customer-centric business models. Their concern, however, is how to determine what the value of CRM is both for their organizational effectiveness as well as for their customers.

IP CONTACT CENTER

54 Overcoming The Hurdles Of VoIP Call Recording

By Patrick Botz, Voice Print International

There are various ways to record VoIP interactions. The right solution for your specific needs can be determined only by carefully examining the structure of your operational and IT environment, your call volume, the number of channels deployed and, of course, your reasons for recording.

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58 Quality Monitoring And Today's Technology

By Tony Procopis and Mark Williams, ASC

Quality monitoring has come a long way in the last few years. When it first came to the forefront, effectively recording calls and basic scoring of agents was proclaimed a godsend. Today, contact centers are achieving much more.



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By Ken Seitz, E Solutions Corporation

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TMCNET.COM ONLINE EXCLUSIVES



Three Easy Steps to Improve Your Call Center Responsiveness

By TMCnet Special Guest Boni Prasanna, VP, YASU Technologies

The question is, how can you manage customized, one-of-a-kind agreements for complex products with your ever-increasing customer base? And how can you do this economically, flexibly and quickly?

Read the full article at <http://www.tmcnet.com/291.1>

Moving The Marketing Machine

By TMCnet Special Guest Melissa Boxer

Marketing has long been the home of the creative; a place to dream up new ideas and spend large budgets, but now more than ever the pressure is on marketing to justify its spending. As an industry we are being asked to show greater accountability for the resources we control and our contribution towards corporate goals.

Read the full article at <http://www.tmcnet.com/292.1>

Bangalore Businesses Broad-sided By Response To Actor's Death

By Tracey E. Schelmetic, Editorial Director, Customer Inter@ction Solutions magazine
When it comes to Bangalore, the heart of India's Silicon Valley, visitors are often struck by the city's high-tech and slick infrastructure, modern buildings and golf courses, not to mention the glowing logos of many of the world's most successful high-tech companies. At first glance, many visitors say, it's easy to forget that you are in what is still a developing nation. For many, the events of the week of April 10th, however, drove that point home with abandon.

Read the full article at <http://www.tmcnet.com/293.1>

Handling Abusive Callers In The Call Center

By Al Bredenberg, TMCnet Editorial Director

If people felt in the past they had to be polite in the face of brazen rudeness, now they say, "I don't think I do."

Read the full article at <http://www.tmcnet.com/294.1>

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CUSTOMER INTER@CTION Solutions® magazine has been the voice of the industry since 1982. It is written by industry practitioners for industry practitioners and is regarded worldwide as the "Bible" of the industry. An annual Buyer's Guide is provided as a feature of the December issue.

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call routing is
good enough.

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{ **Agent effectiveness will
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And that requires managing everything from workforce schedules, skill sets and availability to historical data and demand forecasts.

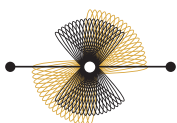
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By: Rich Tehrani,
Group Publisher, Group Editor-in-Chief,
Technology Marketing Corporation

Keeping Up With The Call Center

This past month, I have seen a plethora of call center articles in all different kinds of newspapers and magazines. Lately, I have noticed more and more call center coverage appearing in the general media. It is worth digesting some of this news, as there are some trends worth pointing out. For example, the focus on Indian call centers has increased. These stories, for a change, are not about lost jobs, but interesting aspects of Indian call center life. In a BusinessWeek article titled "Making Bangalore Sound Like Boston" (<http://www.tmcnet.com/285.1>), the author focuses on how call center agents in India are doing less talking and more instant messaging. This is not surprising when you consider a recent Convergys study that found that 72 percent of U.S. consumers claim they would rather use an automated system or the Web than speak with a foreign agent.

In addition, the article touches on accent training, but despite what the title of the article suggests, it seems no call center is intentionally aiming to have its call center agents sound as if they are from Boston. When I saw the headline, I was hoping I could discover a specific company to which the article was referring so I could call and ask an agent to say, "Pahk yah cah in Hahvahd yahd" in a thick Indian accent.

To Caller Abuse" (<http://www.tmcnet.com/286.1>). The theme of this article was the excessive stress levels of Indian call center agents and how their jobs are hurting them psychologically. Female agents frequently must deal with sexual harassment, while many agents of both genders are sometimes subjected to racist comments. The situation is, in some cases, causing high turnover in Indian call centers due to the stress caused by these contentious exchanges with customers.

To combat this trend, Indian workers are in many cases assuming American names and accents, but this ruse lasts only so long, as many callers are capable of hearing the agent's accent, despite that agent's best efforts, and this ploy seems to make customers inclined toward abuse even angrier.

Indian agents also find it very difficult in some cases to interact with Australians, as the working-class Australian accent is difficult for Indian call center agents to understand (and

Based on my informal research, a U.S.-based call center adds large amounts of staff and makes headlines at least once each business day in the U.S.

TMCnet, the Web site of TMC, publisher of this magazine, also ran an interesting story recently that focused on Indian agents: "Indian Call Center Agents Suffering Health Problems Due

vice-versa). Apparently, many of these Australian-Indian calls get out of hand. (The same is also true on an anecdotal basis with British callers.)

Problems like this are pushing corporate executives in the U.S. to be more creative with how they deal with their call center agent costs. Forbes reports (<http://www.tmcnet.com/287.1>) that companies are beginning to explore sharing of call center workers. This is especially productive when companies have different business cycles. For example, one company may have a busy summer season, while another sees the most activity during the end of the year holiday season. A company called TARP Worldwide (<http://www.tarp.com>) ([news - alert](#)) is helping broker relations between companies that are looking to share call center agents.

In addition, many American companies are beginning to focus more on hiring and/or relocating call center activities in the U.S. It may be difficult to believe just how much hiring is going on in U.S. call centers.

For example, Jones Lang LaSalle recently decided to relocate and expand its call center to Pittsburgh (<http://www.tmcnet.com/288.1>). This adds up to 233 jobs in the Pittsburgh area over the next five years.

In addition, the Iowa Department of Human Services will soon set up a new inbound call center in Marshalltown, Iowa, providing 50 to 60 new area jobs

TMCnet Update...

TMCnet will soon be launching a special site to keep track of call center growth and expansion, both domestic and foreign. The site may be found on the following page: <http://www.tmcnet.com/sectors/call-center/>.

(<http://www.tmcnet.com/289.1>). Iowa was once the hotspot for call centers — the Bangalore of the U.S., if you will. I wonder if this activity will lead to even more centers opening up in Iowa.

In addition, the U.S. Department of Defense will be bringing 100 jobs to the Dayton, Ohio region when it relocates its call center there (<http://www.tmcnet.com/289.1>). In a related story, the city of Dayton had been considered as the site for 775 financial services jobs that the Air Force will instead locate in South Dakota.

A whole new area of call center growth is expected to be in the fast-food industry as new call centers are being opened to take drive-through orders. In fact, Santa Maria, California is home to a call center that serves McDonalds' drive-through locations. I suppose this work could be done in India, as well, but given that it's already difficult to understand workers speaking through drive-through order systems, it seems that the additional burden of understanding an accent would only exacerbate the difficulties.

In my opinion, every drive-through should have a phone number on the outside menu so customers can use their

headsets and/or car audio systems to conduct clearer conversations. If the reason this isn't done is to minimize prank calls, then what the restaurants could do is flash a code on the drive-through menu that is valid for the hour. The caller can use this code to prove he or she is, in fact, a customer in line waiting for food and not a bored high school student playing a prank.

Based on my informal research, a U.S.-based call center adds large amounts of staff and makes headlines at least once each business day in the U.S. Of course, not every call center adding personnel gets in the headlines.

This growth is good news, as the call center market experienced a slowdown in 2002 and didn't emerge from the stagnation as quickly as the VoIP market. This month, however, I have witnessed levels of optimism not seen since 1999 to 2000. It's too soon to call this a trend, but magazine editors are generally barometers for industry optimism and pessimism as we come in contact with so many in the industry and are privy to the state-of-the-industry marketing budgets. In my opinion, marketing budgets are a great indicator of industry health, and the space seems quite robust.

I think there are two factors driving much of this interest in call center expansion. First, customers have reacted poorly to much of the outsourcing that has been done to overseas locations, so companies are now trying to improve service levels in the hopes of increasing customer retention levels. Second, there seems to be genuine excitement for the latest call center technologies, dubbed "Call Center 2.0". Companies understand that improving their technologies can save money, increase customer satisfaction and ultimately increase sales. Call Center 2.0 technology generates positive ROI. **CIS**

I recently met with an executive from a company called Movero (<http://www.moverotech.com>). The company is interesting for a few reasons. The first is they are transitioning their call center from Avaya to Asterisk and say they will save \$1,300 per seat and will achieve better quality of service! The company has a call center that supports mobility devices. For example, if you have a problem with your Blackberry, you call RIM, and if you have a problem with your Cingular service, you call Cingular. If you don't know where your problem lies, you call Movero, which can also support the device and wireless network problems.

I asked Movero how easy it has been to build their call centers in Texas and was told that with all the call center jobs being lost to India from the Texas computer companies, they are having an easy



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THE BOARDROOM REPORT™



WITH NADJI TEHRANI



Nuance: Using Speech Solutions To Help Our Clients Improve The Quality Of Their Customer Experience

The Boardroom Report provides the CRM, customer interaction and call center industry's view from the top, featuring the sector's first in-depth, exclusive CEO-to-CEO interviews with leading executives regarding industry news, analysis, trends and the latest developments at their companies. As the industry's leading publication since 1982, it is our responsibility to recognize leaders with the best minds in the industry and share their vision and wisdom with our valued readers. Technology Marketing Corp. founder/chairman/CEO Nadji Tehrani interviewed [Nuance Corporation's \(news - alert\)](#) Chairman and CEO Paul Ricci for this installment of The Boardroom Report.

NT: First, let's start by hearing about Nuance, and what differentiates it from other speech companies. How do you position your company in leadership?

PR: First, Nuance is about helping companies improve the quality and effectiveness of their customer experiences. In short, that's what we do. In a longer answer to your question about differentiation, we believe that what distinguishes us is as follows: First, we have the leading technology in providing speech solutions; second, our ability to integrate those technologies with applications and professional services to provide complete offerings to our clients, thereby helping them help their customers; and third, we have the

longest history of experience in implementations in the industry. As you know, it's a market that is sensitive to failure, so the credibility that comes with the range and depth of implementations that we have is very important to our customers and prospective customers.

NT: What are the greatest challenges that your company faces?

PR: Well, it's a rapidly growing industry, it's a rapidly growing business and it's a business with a complex set of demands. We are having to manage that growth at the same time that we're investing in technology that is evolving at a very rapid pace. And we're having to do this on a worldwide scale because our cus-

tomers demands are worldwide. So for us, the biggest challenge is the complexity of that multi-faceted operational agenda.

NT: What do you feel is a practical solution to these challenges?

PR: One of the principles that we've used in the company is to focus everything we can on serving and improving the quality of our customer solutions. In a way, that helps us sort out the complexity of the business — from sales to marketing to services to technology. What we're doing is improving the quality of the solutions we're deploying with our customers. It's surprising, but in doing that, you're able to prioritize in a way that helps reduce the complexity of the growth.

NT: In terms of communicating the benefits of your technology to the various industries, have you considered "marketing through education"?

The ability for enterprises to evoke their brand, extended through the self-service technology in the call center, is what we're enabling.

PR: That is an important facet of marketing. Our marketing team does spend a great deal of time not just on white papers, but on other forms of communication that help to evangelize and espouse our views regarding how the technology and solutions we provide are enabling change within the call center business, and why speech is very effective. In fact, we believe that's the single most important part of marketing.

NT: In your opinion, what is the greatest need of the speech technology industry?

PR: The most important thing in the speech technology industry is to continue focusing on applications and solutions. Speech has tended to be a technology-driven industry, and we believe that the technology now is compelling and enables a broad range of applications. I think you're aware of the magnitude of enterprise deployments we have. For us, it's primarily a focus on applications and solutions, and deploying those applications and solutions.

NT: Could you share with us some of the new developments at your company?

PR: Over the past 12 months, we've been increasingly focused, in response to what we hear from our customers and they from their customers, on improving the "naturalness" of the communication systems we're deploying in enterprises. In particular, we're focusing

on more robust capabilities for what is known as "natural language understanding." We're also emphasizing robust capabilities for managing the interaction of a dialog, and the increased personalization of the system using voice technologies. The ability for enterprises to evoke their brand, extended through the self-service technology in the call center, is what we're enabling.

NT: What is your vision of the future of the industry, for speech technology as well as the contact center?

PR: In order to think about the future of our technology, it's worth stepping back for a moment and looking at what's happening in the communications and IT worlds. We all appreciate that we're seeing tremendous trends in the IT industry today toward information search, toward increased bandwidth of communications, and, very importantly, toward mobility. In a way, we're seeking to take advantage of the use of speech to optimize those trends. We think that people want more direct access to information in a variety of ways, and speech is an excellent interface to allow them to do that. The mobility trend is also significantly raising the importance of speech because, of course, if you're trying to seek information access via a mobile device, the relative advantage of speech over other modalities is increased.

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

PR: We know a lot about how speech enables our clients to be more effective in serving their customers. I think what underlies that competency is a combination of our technology, our sales experience in speech, and our services and ability to deploy and deliver solutions.

NT: Do you find differences in vertical markets in the way they use speech, such as financial services or insurance or healthcare?

PR: Well, there are very distinct applications in almost every industry. There are some things that are common, but there is a lot of distinction in every industry, because the information access problems in each industry are quite unique.

NT: What would you say is your positioning statement?

PR: Nuance is about using speech solutions to help our clients improve the quality of their customer experience from beginning to end.

NT: How do you differentiate Nuance from your competition?

PR: We are a pioneer in speech technology and a leader in speech deployments. We offer our partners the broadest array of solutions and languages, and we have the leading capabilities in the emerging areas of mobility and embedded solutions.

NT: Thank you for your valuable time.

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CIS



2006 Recommended Vendor List

The TMC Seal Of Approval

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

CRM/Contact Center Software/Hardware

Amae Software



Aspect Software



Co-Nexus, Inc.



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FrontRange Solutions



IEX Corporation



Interactive Intelligence



Jacada



Left Bank Solutions



Mercom



NICE Systems



Nortel Networks



Sennheiser Electronic Corp.



SER Solutions Inc.



Siebel Systems



Spectrum Corporation



SIVOX



Stratasoft, Inc.



Strategic Contact Solutions, Inc.



Telephony@Work



Verint Systems



VoiceLog LLC



Witness Systems





Teleservices Outsourcing

West Corporation



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>

Interactive Intelligence Optimizes The Contact Center

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

"Real-time" is a word you hear a lot in the call center today. But unlike many terms used to describe enterprise software, this one has a sharp and to-the-point meaning. Historical data are nice to have, but they are just that: historical. Historical data tell you what you did wrong (or right) last week, last month or last year. The information is nice to have, but it seldom helps you today. "Real-time" information, on the other hand, is becoming vital to the operations of a world-class contact center. Real-time data let supervisors and managers actually alter the operations of the call center, on-the-fly, to make the best use of resources available at any given time. Problems can be corrected immediately in response to what's happening now — not what happened last week.

You may already know Interactive Intelligence's contact center automation software, Customer Interaction Center (CIC). CIC is the company's flagship product. It is an innovative, standards-based, pre-integrated communications application suite that enables contact centers to manage phone calls, faxes, e-mails and Web interactions from one platform. What we'll see coming from Interactive

Intelligence next is its Interaction Optimizer software, the newest component of the company's growing workforce management offering, ideal for contact centers large or small. Along with Interaction Recorder, offering quality management, call scoring, and screen recording, CIC's customer satisfaction surveys, and its Interaction Supervisor application for monitoring and whisper coaching, Interaction Optimizer was designed to help deliver usable data in real-time to managers and supervisors for the purpose of agent management. The solution helps simplify supervisors' jobs while at the same time maximizes service levels and ensures adherence to company goals and assigned shifts.

Interaction Optimizer combines historical data with predicted market expectations. The solution actually anticipates the expected volume of interactions: phone, e-mail, chat. It then automatically assigns the optimal number of agents to manage the given forecast. Interaction Optimizer generates agent scheduling to accommodate vacation time, schedule changes and variances, labor/union laws, employee availability and skill matching (considerations that, when managed manual-

ly, can lead to one very large migraine headache). As a result, Interaction Optimizer can produce a demand forecast that can be used to determine appropriate scheduling targets with great accuracy. By combining agents' scheduling requests and any last-minute changes that are made, Interaction Optimizer is able to produce a schedule to balance the interaction demands with the agent preferences and skills, the latter being a step that has been shown to reduce agent turnover and keep call center employees happier. One other much-touted feature of the product is the inclusion of real-time adherence functionality, allowing the contact center manager to track how well agents are complying with the defined schedules.

Interactive Intelligence stresses that the solution requires no third-party integration, no additional implementation time, and no upgrade hassles — a large bonus for many busy call centers, particularly the small and medium-sized centers that have historically been unable to bear the cost and complexity of standalone WFM solutions. Interaction Optimizer also provides a common interface for CIC, Interaction Supervisor and its

Interaction Optimizer is able produce a schedule to balance the interaction demands with the agent preferences and skills, the latter being a step that has been shown to reduce agent turnover and keep call center employees happier.

administration tool, Interaction Administrator, further simplifying management.

"Our customers are telling us that there is a major disconnect in the workforce management market," said Joseph A. Staples, senior vice president of worldwide marketing for Interactive Intelligence. "On the one hand there are distinct advantages to WFM in creating a more effectively managed contact center.

Yet, on the other hand, the integration time and cost of buying a third-party product and incorporating it into the contact center software can be expensive and burdensome beyond belief. We took a different approach. In our offering, Interaction Optimizer is just another module that shares the common CIC platform. No integration to worry about. No multi-vendor finger-pointing. And all the benefits of a solid, highly scalable workforce management system.

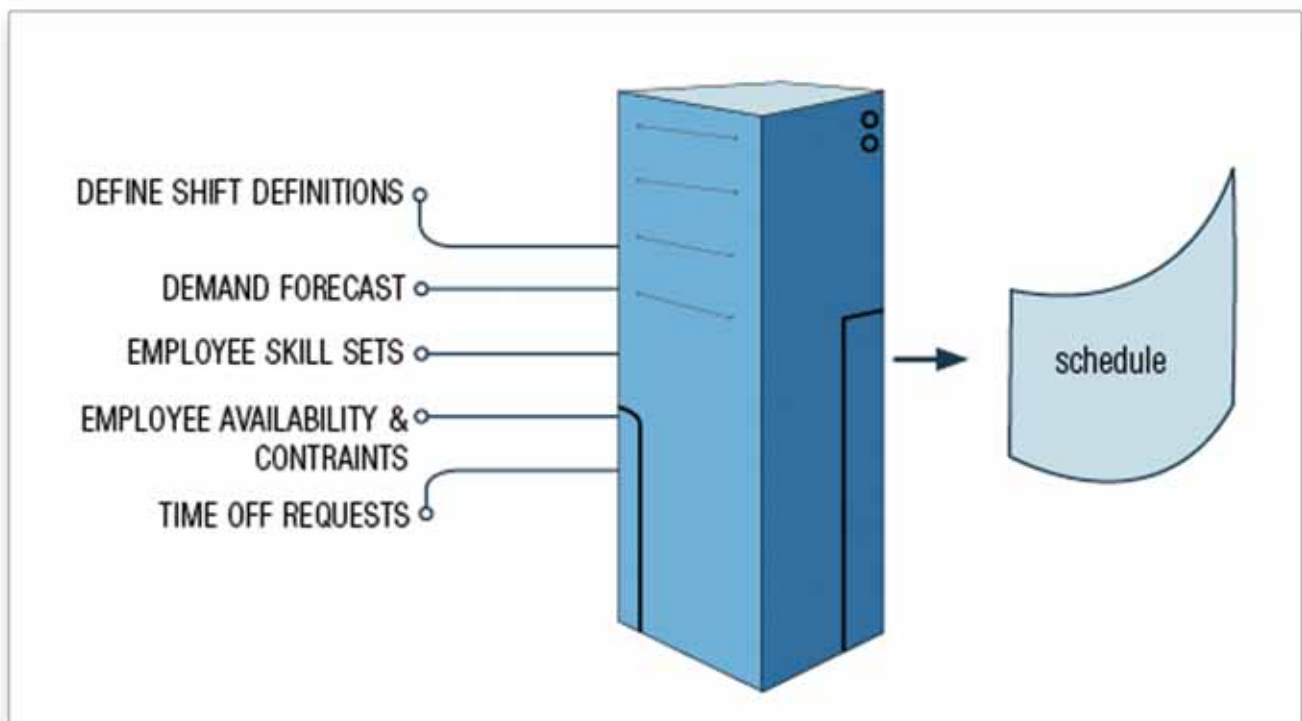
"Because Interaction Optimizer is completely integrated with CIC's ACD application, we have access to data, information and statistics that can be fully utilized as part of the

workforce management planning and adherence process. Integrating third-party WFM applications either requires a tremendous amount of effort to accomplish this same job, or else they simply can't do it at all," said Staples. **CIS**

Interaction Optimizer is planned for general availability in the third quarter of 2006, and will be offered through Interactive Intelligence's VAR channel. For more information, visit <http://www.inin.com>. (news - alert)

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

M1Global Delivers On-Demand Business Convergence Platform

M1 Global Solutions ([news](#) - [alert](#)) recently announced version 2.0 of its Business Convergence Platform, which harnesses the power of IP convergence and service-oriented architecture (SOA) in a single, hosted technology platform to deliver communication-enabled business processes on demand. With the new release, M1 is also offering an easy-to-use process modeling tool called the Convergence Studio. The Convergence Studio serves as a single point of control for accessing and customizing the integrated interaction management, voice/Web self-service, real-time collaboration, business process management and data integration capability included in the Business Convergence Platform. M1 designed the solution to enable companies of all sizes to more quickly and cost-effectively create, deploy and adapt communication-enabled business processes to create solutions that help redefine the customer experience, streamline work distribution across the value chain and enhance business agility. M1's Convergence Studio innovation comes in the form of a simple Eclipse-based process modeling tool that allows customers to build new communication-enabled business applications, through its ability to model voice and Web interactions and data flows, then auto-generate the code required to implement communication-enabled business processes on the Business Convergence Platform with transaction-based pricing.

<http://www.m1global.com>

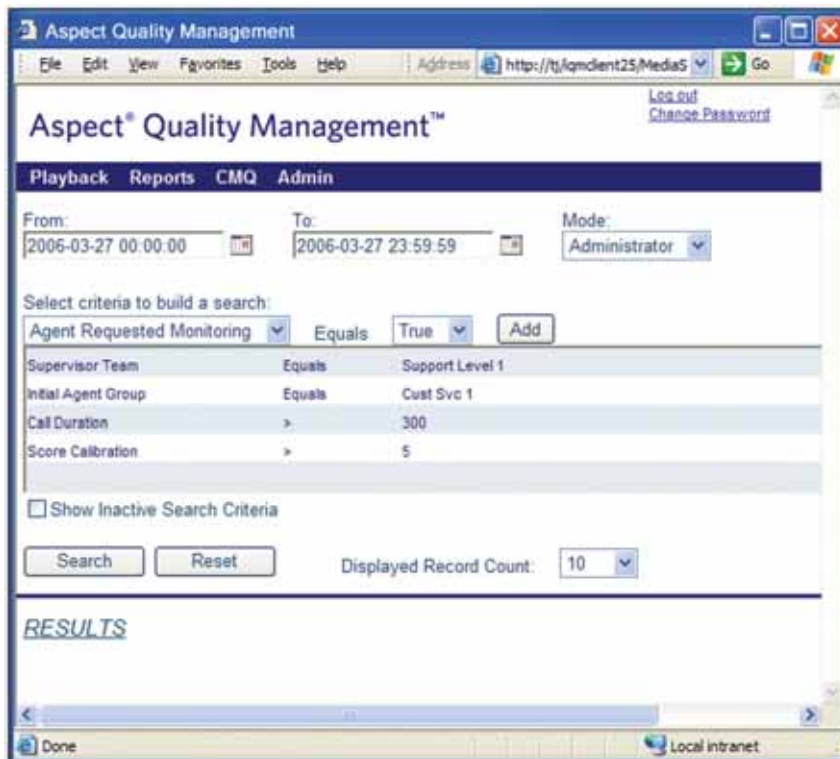
Aspect Software Acquires Quality Management Provider SophistiCom Technologies

Aspect Software, Inc. ([news](#) - [alert](#)) recently announced it has acquired substantially all of the assets of **SophistiCom Technologies Inc.**, ([news](#) - [alert](#)) a privately-held

provider of quality management software based in Schaumburg, IL. Financial terms of the transaction were not disclosed.

SophistiCom develops a quality management application that provides quality assurance capabilities as well as full-time call logging of all customer interactions to meet an array of recording requirements. The acquired application, which will be known as Aspect Quality Management, enables companies to better address regulatory compliance, risk mitigation and employee development concerns. With this acquisition, Aspect Software adds a significant piece to its contact center portfolio, which fills out its Performance Optimization offering, allowing for synchronization across all critical performance optimization capabilities: quality management, performance management, workforce management and interaction optimization. This approach provides a greater benefit than the individual applications could deliver alone, and still greater benefits when coupled with other Aspect Software contact center products, according to the company.

<http://www.aspect.com>



Aladdin Finds His VoiceGenie

By Robert Liu, TMCnet Executive Editor

In planning its latest acquisition internally, Genesys Telecommunications Laboratories' President and CEO Wes Hayden amusingly code-named the project "Aladdin." And with the recent announcement that the Alcatel company will acquire VoiceGenie, Aladdin may have gotten his wish. But "a Whole New World" comes at what price?

Since the advent of VoiceXML as an industry standard, the voice portal market has remained in a state of flux with customers increasingly opting to swap their legacy IT systems out of costly proprietary solutions and into an open architecture that helps simplify new applications development and deployment. As a result, vendors such as VoiceGenie have been helping big customers take advantage of VoiceXML to roll out self-service solutions in enterprise contact centers or services like directory assistance and virtual receptionists for telecom services providers.

Genesys, meanwhile, has been organically growing its own voice portals practice since it bought its way into VoiceXML in 2002 when it scooped up Telera for \$136 million, which until recently represented the only other time that technology served as the primary impetus for its acquisition strategy.

"This gives us the path to really accelerate the market going forward," Hayden told analysts on a recent conference call. "That's clearly an area on which we have the intentions to provide great focus and maintain a leadership position."

Together, Genesys and VoiceGenie will be the undisputed leader of the voice portal segment with almost 25 percent market share — almost two-and-a-half times the size of its closest competitor. Additionally, the companies' customer bases are both very complementary, meaning there will be very little "cannibalizing" of sales.

Whereas a bulk of Genesys' voice business has been "call-center-centric," (as Hayden described it), focused on the enterprise market in particular, VoiceGenie has been very successful in the service provider space. In fact, VoiceGenie's growing success in attracting enterprise customers is what contributed to Genesys taking notice of the company in the first place, he explained.

"It gets them to an incredible level of critical mass," said Sheila McGee-Smith, president and principal analyst at McGee-Smith Analytics. "VoiceGenie has strong carrier customers. VoiceGenie's history is they started the whole VXML movement with AT&T about 10 years ago. They come from a very strong carrier legacy."

But Genesys' magic wish comes at a relatively high price. While terms of the transaction remain undisclosed

(except to say that it was financed with cash; Hayden declined to disclose how much cash his company had on its year-end balance sheet), he did confirm that Genesys paid a multiple equivalent to one-and-a-half times their projected yearly revenue for VoiceGenie.

If that's the case, then VoiceGenie was able to command a multiple at the high end of the range. For example, when Intervoice acquired Edify for \$33.5 million in cash from S1 Corporation, that deal was valued at only 0.9 times revenue. That was the valuation that Genesys used in evaluating the assets of GMK of Brazil earlier this year.

During the Q&A portion of the conference call pertaining to the announcement, Hayden also confirmed that Genesys wasn't the only suitor courting VoiceGenie, which may explain the premium paid to the Toronto-based VoiceXML innovator.

"I don't think they needed it. The technology they have is very similar," McGee-Smith told TMCnet during a brief telephone interview.

In rebuttal, Hayden claims that Genesys is getting more from the VoiceGenie acquisition than it has in its previous buyouts: GMK, Telera and CallPath, the latter having been acquired in May 2001 from IBM. "Each of those acquisitions offered a different dimension," Hayden said.

"With Telera, we wanted the technology and we wanted the people," he said. But with CallPath and GMK (affectionately known locally as "Gimme-Ka"), the acquisitions were more about adding customers and skilled workers than intellectual property.

"What makes this [VoiceGenie] deal so exciting is they've got all three," Hayden added, referring to its vanguard technological developments, marquee customers and talent pool of 90 employees. In fact, upon completion, Genesys will have a combined workforce of 130 to 150 engineers dedicated solely to VoiceXML development.

Upon completion of the transaction, the two enterprise voice portal companies plan to forge ahead with integrating their two VoiceXML-based platforms into a single offering to serve enterprises, service providers and carriers. The public strategy of the integration project will also be known as Aladdin.

Project Aladdin is expected to yield an integrated, universal voice platform by the middle of 2007. No word yet on whether the combined company will re-brand that solution under the Aladdin name. **CIS**

Robert Liu is executive editor at TMCnet. He may be contacted at rliu@tmcnet.com.

UCN inContact Provides On-Demand Contact Handling

UCN, Inc., ([news](#) - [alert](#)) a provider of on-demand contact handling software and business telecommunication services delivered over the UCN national VoIP network, has announced the addition of several new features to its inContact contact management suite. The new features include call dispositions, enabling tracking of call outcomes; control over time zone settings; and call transfer options, enabling more efficient use of inContact resources while improving the customer contact experience. With dispositions, a contact center agent has the ability to quickly describe and categorize the outcome or action of a call upon completion of that call. To use the service, the representative simply selects a word or phrase from a customizable list of dispositions that automatically pops up after a call. There is an optional comments field where detailed descriptions can be added. During periods of high call volume, the system saves the disposition input screen, allowing an agent to return to enter customer dispositions during slower periods. In keeping with the company's goal of giving customers maximum control over their contact center environment, inContact users now have two options for setting the time used for date- and time-related details. Businesses can define one corporate time zone for all reports, scheduling and contact details, or they can let each agent set their own time zone. In situations where agents are in multiple time zones, it is more convenient for the agent to reference a local time instead of the time zone of headquarters. This new functionality maintains the date and time integrity for reports and contact details for headquarters no matter where agents are located.

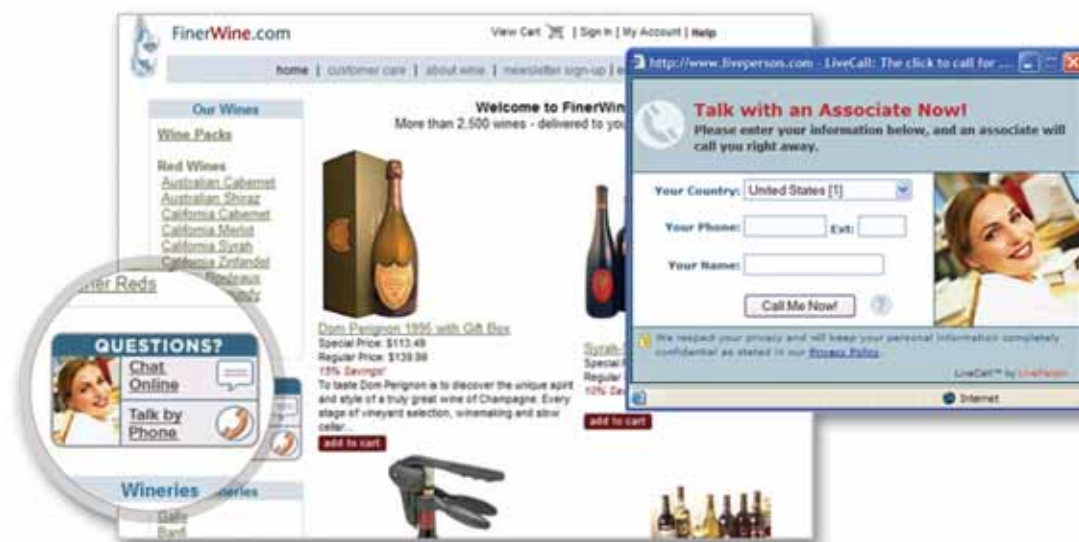
<http://www.ucn.net/incontact>

LivePerson Launches Click-To-Talk Solution For The SMB Market

LivePerson, Inc., ([news](#) - [alert](#)) a provider of online conversion solutions, has announced the availability of LiveCall, a click-to-talk application designed to bridge the gap between the online and phone channels for the small and mid-sized business (SMB) sector. More than 100 SMB customers have already adopted LivePerson's patent-pending technology that enables Web site visitors to instantly click to talk with sales representatives or customer service agents, who maintain full visibility into the online session during the phone call. LiveCall adds new capabilities to LivePerson's existing multichannel platform that manages customer interactions across all online channels — live chat, e-mail and self-service/knowledgebase. Delivering a seamless transition from Web to voice, the solution offers advanced integration and interaction benefits. Integration features supply insight into the context, nature and history of customer inquiries, while interaction tools allow agents to use page-push, co-browse and form-sharing technology to help customers complete their online purchases or resolve service issues. LiveCall enables SMBs to manage customer phone calls

with the same ease, efficiency and cost-effectiveness as Web-based interactions. When a visitor initiates a call request, LiveCall immediately routes the request to the appropriate department or agent in the application's operator console. As soon as an agent accepts the request, the call is automatically activated, connecting the customer and agent instantly.

<http://www.liveperson.com>



Servigistics Announces Workforce Management Solution

Servigistics, ([news](#) - [alert](#)) a service parts management and pricing solution provider, has announced the availability of the Servigistics Workforce Management solution. Developed to forecast, plan and monitor field service technicians, the solution works in concert with the company's service parts planning and pricing solutions to provide a strategic service management solution that manages service technicians, service parts and service part prices together to reduce costs and improve service levels. Specifically designed to provide a commitment-centric, closed-loop strategic service management solution across technicians and service parts, Servigistics Workforce Management combines service planning methodologies, configurable metrics and alerting business logic, and a flexible, scalable and open architecture on a single data model to offer a compelling solution for today's complex service operations. Servigistics Workforce Management clients typically recognize improvements in first-pass fix rates as well as improved planning, visibility and service level agreement (SLA) compliance.

<http://www.servigistics.com>

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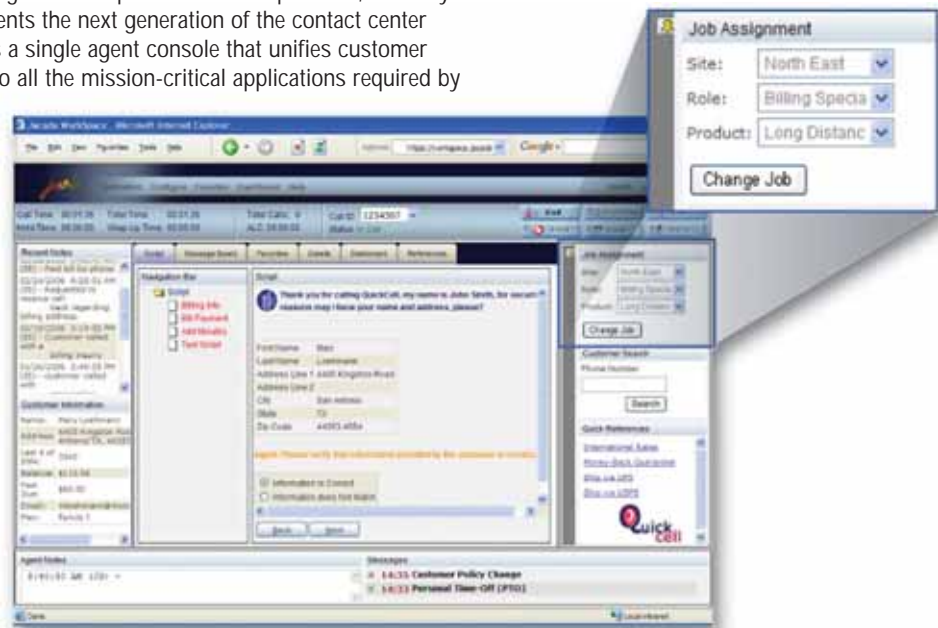
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Jacada Releases Unified Desktop Solution

Jacada Ltd., ([news](#) - [alert](#)) a provider of contact center productivity solutions, recently announced the availability of version 3.0 of its unified desktop solution, Jacada WorkSpace, and outlined the company's vision and strategy to meet the demands of the growing number of contact centers that must modernize the agent desktop. Jacada WorkSpace 3.0, formerly branded Jacada Fusion Agent Portal, represents the next generation of the contact center desktop, according to the company. It offers a single agent console that unifies customer interaction tools with a single access point to all the mission-critical applications required by the agent to effectively complete a customer interaction. Jacada WorkSpace 3.0 delivers capabilities that enable companies to freely implement optimal contact center processes and maximize customer service representative productivity. Enhancements to the new version include universal agent capabilities; support for multiple, simultaneous call sessions; support for Linux servers, and Asynchronous JavaScript Technology and XML (AJAX) controls and features found in the new Web 2.0 rich-client foundation.

The Universal Agent feature in Jacada WorkSpace 3.0 automatically displays the right tools and applications on the agent desktop based on any number of parameters, including the task or role the CSR is to perform, the geographical location of the caller, the number dialed, or information captured from the interactive voice response (IVR) system.

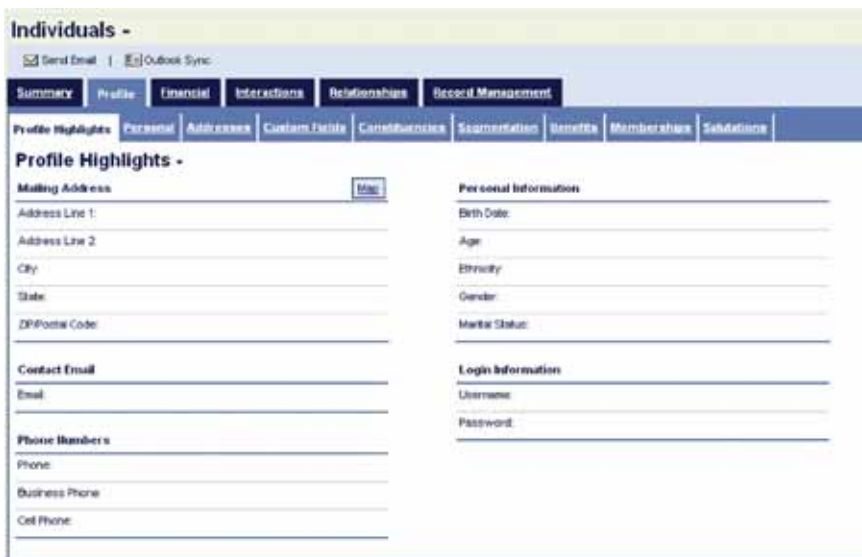
<http://www.jacada.com>



Kintera Launches Social CRM System

Kintera Inc. ([news](#) - [alert](#)) recently announced the launch of Kintera Sphere v8.0, its new social CRM system. The system enables organizations to drive all interactions based on comprehensive knowledge of constituents and provides a single, interactive system to manage relationships. Uniting constituents' online and offline experiences into one database, Kintera's social CRM system provides nonprofits and constituents with a total view of the constituent's relationship with the organization. Built on Kintera Constituent Relationship Management (CRM) and comprised of Donor Management, Member

Management, Prospect Management, Participant Management and Volunteer Management solutions, the social CRM system provides nonprofits with the data needed to build relationships with donors, members, prospects, participants and volunteers. Social CRM uses meaningful communications to create a more powerful giving experience, including enhanced trust, sense of belonging, instant gratification, emotional release and sense of social impact, according to the company. Delivered via the Kintera Sphere software as a service platform, Kintera CRM is the foundation of the social CRM system and enables nonprofits to centrally record and manage the most important aspects of their relationships to provide constituents with an improved experience with their organization. Organizations can build more complete constituent profiles with extensive standard profiles, custom fields and dynamic segmentation.



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**Unica Corporation Announces
Affinium Detect And
Affinium Leads**

Unica Corporation, ([news - alert](#)) a provider of enterprise marketing management (EMM) solutions, has announced the availability of Affinium Detect for event-based marketing, and enhancements to its Affinium Leads product, including Affinium Leads Referral and Affinium Leads Contact. These products are new releases and enhancements of the former **MarketSoft Software Corporation** products for event-detection, customer alerting and lead management. Using its pattern-detection engine, Affinium Detect monitors individual customer behavioral patterns to identify immediate sales or service opportunities. Examples include identifying changes in service usage patterns, unusual transaction activity relative to a customer's normal behavior, complex combinations of events, and even "inactivities" such as a missed regular transaction — all of which signal important opportunities to engage with customers for cross-sell, retention or loyalty-building. In addition, Affinium Detect's packaged customer alerts enable banks, credit card providers and other financial services organizations to easily implement turn-key customer alert services with differentiated capabilities customers will value, such as customer self-defined budget alerts and unusual activity alerts. Affinium Detect's customer alert functionality easily integrates with any e-banking infrastructure.

<http://www.unica.com>



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etalk Debuts Qfiniti Enterprise In Spanish And Portuguese

Answering the needs of contact center growth in Latin America, quality management and speech analytics provider **etalk** ([news](#) - [alert](#)) has introduced its Qfiniti Enterprise suite of call center applications in Portuguese and Spanish. By offering its marquee solution in the native languages spoken in Latin America, etalk expects to spur further growth in an already burgeoning contact center market. etalk's regional sales increased by 54 percent in 2005. In addition, the number of contact center agent positions in the region is expected to increase by 17 percent annually to reach 730,000 in 2008, according to Datamonitor. Qfiniti Enterprise is a unified call recording, agent evaluation and advanced speech analytics solution for the contact center market. Qfiniti Enterprise delivers these services on a single platform that allows contact center users to simply log in with the language of their choice. In addition to the user interface, the speech analytics capabilities are also localized, so searching and script analysis occurs in the user's preferred language. Because the Qfiniti Enterprise platform is "language independent," the solution is well suited for multisite, international contact centers, since each user can simply control the default language setting from within Windows. A call center supervisor in Mexico can have his language setting in Spanish, and simultaneously, another user within that same organization located in Brazil can set his language to Portuguese. This ensures that a global program can be deployed and managed from a centralized location, regardless of where the specific call center or remote agent resides.

<http://www.etalk.com>

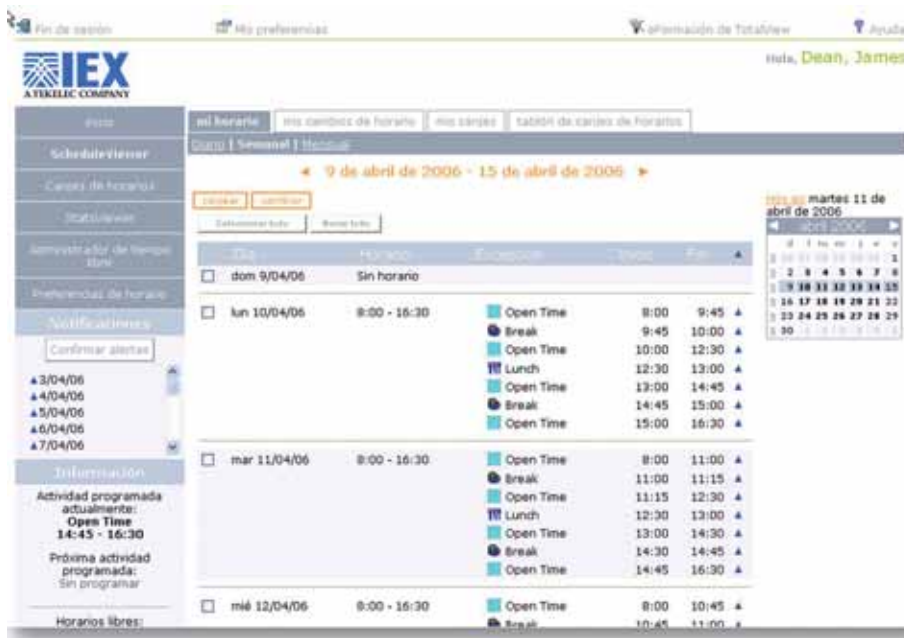
IEX Renews Contract With TecnoSis To Distribute TotalView In Mexico

IEX Corporation ([news](#) - [alert](#)) has announced the renewal of its distribution agreement with Mexico reseller TecnoSis, and the availability of the Spanish language version of the IEX TotalView Workforce Management system. Now contact centers can purchase a native language version of the TotalView system directly from TecnoSis, who will also provide local support.

"The Mexican contact center market is growing. More and more centers in the region are deploying advanced workforce management solutions as part of their strategic quest for performance optimization," said Jim Della Chiesa, vice president of sales for IEX. "The renewal of our productive relationship with TecnoSis, coupled with the release of TotalView in the Spanish language, makes feature-rich workforce management more accessible to the Mexican market."

IEX is a provider of workforce management and optimization technology for contact centers. TecnoSis focuses on increasing the efficiency and effectiveness of contact centers through the distribution of popular software products within the Mexican region.

<http://www.iex.com> and



Pegasystems And Kanbay Deliver Business Process Management Solution For Financial Services

Pegasystems Inc., ([news](#) - [alert](#)) a provider of unified process and rules technology, and **Kanbay Incorporated**, a subsidiary of **Kanbay International, Inc.**, ([news](#) - [alert](#)) a global IT services firm, have announced an alliance to develop and deliver business process management (BPM) expertise to financial services organizations. The alliance brings Kanbay's financial services domain expertise and global IT services delivery capability together with Pegasystems' BPM solution frameworks. Working together, Kanbay and Pegasystems are leveraging their collective experience to create repeatable, high-value BPM frameworks for financial services organizations. The initial focus of the alliance will be on developing BPM solutions in the areas of risk management, compliance, account acquisitions and dispute management systems. As part of the collaboration to develop these types of high-value BPM frameworks and best practices, Kanbay has trained associates in its BPM practice area on Pegasystems' solutions. To date, more than 25 Kanbay associates have been trained and are currently engaged alongside Pegasystems on several BPM projects for a large global banking organization.

<http://www.pegasystems.com> and
<http://www.kanbay.com>



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CUSTOMER EXPERIENCE MANAGEMENT

VoiceLog Launches VirtualLogger Division

VoiceLog LLC, ([news](#) - [alert](#)) a provider of third-party verification, has announced the formal launch of its VirtualLogger division. VirtualLogger is a call recording and quality monitoring solutions provider that employs the hosted/application services provider model to deliver its services. In addition, VirtualLogger offers other agent optimization technologies, such as speech analytics and real-time dashboards on a similar "hosted" basis. VirtualLogger was designed to eliminate upfront capital costs and reduce the cost of system administration and storage, all for one monthly fee. In addition, VirtualLogger reduces both technological and business risk since clients can inexpensively upgrade to completely new technologies (e.g., traditional telephone to VoIP) and can reduce or eliminate the cost to match changes in business needs.

<http://www.voicelog.com>

InfoTronics, Inc. Introduces Web-Hosted Attendance On Demand

InfoTronics, Inc., ([news](#) - [alert](#)) a developer of Web-enabled time and attendance software systems, has introduced Attendance on Demand, an on-demand, Web-hosted time and attendance service for secure, cost-effective labor management. Attendance on Demand is a Web-based hosted time and attendance system with full capabilities for labor management, including scheduling, time keeping, accruals, incidents, budgets and more. Organizations use Attendance on Demand as a service, with monthly per-employee billing, exporting labor data into virtually any payroll system. With Attendance on Demand, organizations leverage InfoTronics' expertise to deploy, host and manage access to complete time and attendance labor management functions. The application is delivered over highly secure networks on a subscription basis — speeding implementation, minimizing the expenses and risks, and overcoming the significant costs and chronic shortage of qualified technical IT personnel available in-house.

<http://www.infotronics.com>

attendance ON DEMAND

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Frank's Menu	Payroll	Scheduling	H.R.
Daily Operations	Weekly>Mon to Sun	This Week	Usage
<ul style="list-style-type: none"> Labor Dashboard Payroll Monitor This Month Schedules Weekly To-Do Transfers Time Card Approval Sheet System Activity 	Employees 91 Previous Period Begins 11/07/05 Ends 11/13/05 Posted Issues 0, 0 critical Hours 3486.75 Dollars 37015.3400 Status Ready	Begins 11/14/05 Ends 11/20/05 Employees Scheduled 88 Employees Scheduled Off 10 Employees Without Schedules 3 Next Week Begins 11/21/05 Ends 11/27/05 Employees Scheduled 88 Employees Scheduled Off 3 Employees Without Schedules 3	Active Employees 91 Hourly Status Types Full Time 90 Part Time 1 Active Conditions Normal 90 Probation 1 Training 0 Billing Usage Period Type Monthly Usage From 10/01/05 Usage To 10/31/05 Active Employees 113 ESS Employees 12 Supervisor Accounts 5 Billing Periods 3
Scheduling	Current Period		
Summary Sheets	Begins 11/14/05 Ends 11/20/05 Issues 24, 3 critical Hours 2346.25 Dollars 25018.9400 Status Please Repair!		
Reports			
Operations			
Learning Center			

Nortel Provides Choice For End-to-End Convergence Solutions For The Enterprise Market

Nortel ([quote](#) - [news](#) - [alert](#)) has strengthened its end-to-end converged networks portfolio with the general availability of the Nortel Secure Router portfolio, extending the power of convergence from main office locations to branch offices. The new products were designed to enhance Nortel's commitment to provide seamless, feature-rich enterprise networks that support critical, real-time applications including data, voice, video and streaming media applications. The Nortel Secure Router 1000 portfolio is comprised of the 1001, 1002 and 1004 for small office and branch office deployments. It also includes the Secure Router 3120 for mid-range branch deployments. In addition to ease of implementation and interoperability, Nortel Secure Routers deliver more than double the performance throughput at 25 percent less cost than equivalent routers from competitors. Nortel Secure Routers are being made available direct through Nortel and through Nortel's extensive partner distribution channel. Several have been testing the routers in preparation for the launch.
<http://www2.nortel.com>

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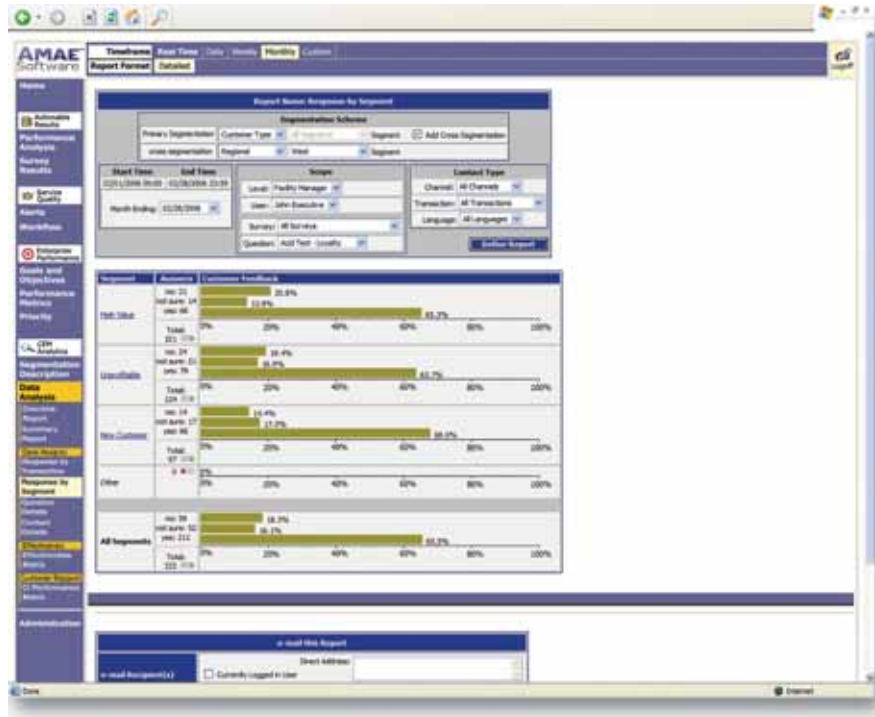
WWW.DATATEL-INFO.COM

info@datatel-info.com

Amae Software Announces The CEM Analytics Module

Amae Software ([news](#) - [alert](#)) recently announced a new module within the Amae CI Suite, the company's flagship post-call IVR, Web and e-mail survey system. The Customer Experience Management (CEM) Analytics Module was created to deliver actionable, customer-driven analytics to the call center in real-time. The CEM Analytics Module is fully integrated with and complements all existing Amae CI Suite functionality. The new module includes reporting across all customer contact channels and transaction types and includes alerts and workflow at all levels within organizational hierarchy. The Amae CI Suite intelligently collects, reports and incorporates customer-driven information and performance metrics based on the specific people, products and processes each customer experiences.

<http://www.amaesoftware.com>



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Oracle Releases Siebel-based CRM On Demand

Oracle ([news](#) - [alert](#)) has announced the latest release (version 10) of its Oracle CRM On Demand, which is based on Siebel's hosted CRM application. It was designed, according to the company, to deliver a comprehensive CRM solution that is rapidly deployable and cost-effective, in a secure, hosted environment. Release 10 provides enhanced customization capabilities.

According to Oracle, the price is attractive, too. The company maintains that, "Only Oracle On Demand can offer a complete, hosted CRM solution supported by an award-winning global support organization for as little as \$70 per user. Terms, conditions, and restrictions apply."

"With today's announcement, Oracle CRM On Demand becomes an even more powerful option for driving sales, marketing and service success, with a fast-to-deploy CRM solution that is easily configurable by business users," said Juergen Rottler, executive vice president of Oracle On Demand and Oracle Support.

Oracle CRM On Demand Release 10 includes enhanced customization capabilities, extended support for sales and service processes, and expanded vertical industry functionality, an increasingly popular trend for CRM companies seeking to sell ready-made product to the big verticals: financial services and healthcare. The end goal was a rapidly deployable, hosted solution offering enterprise-class CRM functionality and requiring little or no support from IT.

<http://www.oracle.com>

Premiere Global Solutions Upgrades Collections Accelerator

Premiere Global Services, Inc., ([news](#) - [alert](#)) a global outsource provider of business process solutions, recently announced an upgrade to its Collections Accelerator solution that provides a convenient, automated method of payment capture for Automated Clearing House (ACH)/debit card users. The new payment feature enhances the collections process for Premiere Global customers by broadening the accepted payment forms and decreasing the number of live agents needed to handle collections transactions. Premiere Global's Collections Accelerator solution uses innovative communication technologies to make it easier for enterprises to contact their past-due customers and collect payments through a simple voice interface, helping reduce days sales outstanding (DSO) by improving payment rates. Collections Accelerator can reduce costs associated with the printing and mailing of statements and past due notices and enables enterprise customers to reduce the amount of receivables they assign to higher-cost third-party collections companies. Premiere Global introduced the new ACH/debit feature for Collections Accelerator in response to the increase in electronic payments and debit card usage by consumers, which the Wall Street Journal recently reported now represents 60 percent of transactions processed by Visa USA Inc.
<http://www.premiereglobal.com>

Humantech Announces Lean Ergonomics Seminars

Humantech, Inc. ([news](#) - [alert](#)) has announced the addition of a two-day seminar to its current seminar schedule, Applied Lean Ergonomics. Lean champions, lean team members, manufacturing engineers and managers, and subject matter experts for ergonomics and human performance will learn to leverage ergonomic principles in lean manufacturing activities from Humantech's experienced, board-certified ergonomists. The Applied Lean Ergonomics seminars will be offered June 6-7, 2006 and September 26-27, 2006 at Humantech's Ann Arbor corporate training center.

According to Mike Wynn, certified professional ergonomist and vice president of Humantech, "The Applied Lean Ergonomics course adds a unique set of tools to the lean tool kit for organizations to accelerate their lean journey. These tools quickly identify lean and ergonomic issues at the workstation level." Course participants will learn how to achieve substantially improved quality and efficiency, a stable and healthy workforce and a new level of operator involvement in the lean improvement process.

<http://www.humantech.com/seminars>

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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 One 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.

Amcat International Inc.

Amcat was founded in 1990 after identifying the need for companies to grow by expanding their capability to contact customers through outbound call center software technology. The company, which was an early pioneer of CTI (computer-telephony integration), offers solutions that allow organizations to more effectively communicate with their customers via multiple channels, including inbound/outbound and blended voice, e-mail, fax and the Web. Amcat contact center solutions increase productivity, reduce operating costs and improve the quality of each contact.

Charles Ansley President and CEO Symon Communications Inc.

Charles Ansley has responsibility for all operations of Symon Communications globally. He served on the Board of Directors and as a member of the Compensation Committee since 1997. Previously, Ansley was President of EDS's Information Solutions U.S., where he was responsible for client relationships, service delivery, client satisfaction and sales. He served as President of units at EDS, including the Communications Industry Group, Communications Service Line and Financial Process Management. Before joining EDS, he served at DSC Communications as Senior VP of Sales and Services.

In the mid 1990s, Ansley was an officer at AT&T, serving as VP of Client Services and Marketing, where he helped create and found AT&T Solutions, an organization focused on the systems integration and network outsourcing marketplace. During his long tenure at IBM, he held successive senior-level roles in general management, sales, marketing and business development in both IBM and IBM Global Services.

Kathryn Barber President Barber Consulting

Kathryn Barber has spent 25 years in the telemarketing business, starting her career on the ground floor as a telephone representative. From 1978 to 1989, she held senior management and marketing

positions within direct marketing companies and service agencies, including Grolier Publishing, National Data Corporation and ICT Group. In 1989, Kathryn formed BCSI, a consulting and management firm specializing in outsource management and promotional development using telephone-based technologies. In 1991, Kathryn patented a telephone-based greeting product with partner Brad Wendkos, President of the creative agency Phoneworks. From 1992 to 1996, Kathryn served as President of Telemarketing at LCS Industries. From 1993 to 1995, she also held the post of LCS's Chief Quality Officer.

Gary Barnett Chief Technology Officer and Executive VP, Worldwide Customer Support Aspect Software

A recognized contact center industry luminary, Gary Barnett is CTO and Executive VP of Worldwide Support Services at Aspect Software. He is responsible for corporate planning, product architecture and lifecycle management. He also oversees strategic partnerships and long-term product integration plans that support enterprise-level applications, and ensures that customers receive the level of product support required to achieve their customer contact strategies.

Most recently, Gary served as president and CEO of Aspect Communications. He played a key role as a founding engineer at Aspect Communications in the development of the company's first automatic call distributor (ACD). He was a founding engineer at Otel Communications, where he was one of the developers of the company's first voice-messaging system. In 1987, Gary became a founder of Prospect Software, a company that pioneered computer-telephony integration in the early 1990s. He returned to Aspect in 1996 when the company acquired Prospect Software.

Eli Borodow CEO and Co-Founder Telephony@Work

Eli Borodow is CEO and co-founder of Telephony@Work, the worldwide leader in multi-

tenant IP contact center technology for enterprises, outsourcers and service providers. An attorney by training, Borodow has a diverse background in managing technology companies. His focus since 1989 has been in the computer telephony and call center arenas, with industry-related experience in software design, sales, legal and marketing communications. He is a longstanding speaker at a variety of industry trade events, and his opinions and writings appear frequently in the industry press.

Ralph Breslauer Executive Vice President, Global Sales and Marketing Aspect Software

With more than 20 years of enterprise software experience, Ralph Breslauer serves as Executive VP of Global Sales and Marketing at Aspect Software. He joined the company in January 2002 and currently leads the company's global sales force in its mission to help Aspect Software's customers build the desired relationships with their own customers. In addition, he heads the strategic development and execution of the company's branding and marketing efforts.

Prior to Aspect Software, Breslauer was Senior VP of Worldwide Field Operations for eRoom Technology, a provider of Web-based collaboration software. Previously, he was VP of Marketing and Business Development for Informix Software's \$700 million TransAct Business Group. In addition, Ralph has held a number of other executive roles during his career, including VP of Marketing for Databases and Tools at Ardent Software and Executive VP at System Builder Corporation.

Richard Brock Chairman and CEO Firstwave Technologies, Inc.

Richard Brock founded Firstwave Technologies, Inc., formerly Brock International, Inc., in 1984 to answer the call of businesses that needed a solution to automate their sales, marketing and customer service processes. The founder of Brock Capital Partners, a capital investment firm, and a director of Datastream Systems, Inc., a provider of maintenance software, Brock also served as Chairman of the Technology Association of Georgia. Prior to starting Firstwave, he founded and served as CEO of Management Control Systems, Inc., now a division of the Research Institute of America.

Donald E. Brown, M.D. Chairman of the Board, President and CEO Interactive Intelligence

Donald E. Brown, M.D. co-founded his third software company, Interactive Intelligence, in October 1994 and has served as CEO since April 1995 and President since the company's inception. Brown has also served as Chairman of the Board since July 1998. Brown has been a director since inception.

In March 1988, he co-founded Software Artistry, Inc., a developer of customer support software that became a public company in March 1995 and was subsequently acquired by IBM in 1998. At Software Artistry, Brown served as CEO and director from inception through September 1994. His first software company was acquired by Electronic Data Systems, Inc. in 1987.

Steve Brubaker
Vice President, Corporate Affairs
InfoCision Management Corp.

Steve Brubaker is senior VP of corporate affairs for InfoCision Management Corporation. In this position, he builds relationships with business leaders, government officials and the public to promote the positive impact of InfoCision and the call center industry. Brubaker began his career with InfoCision in 1985 as a part-time Communicator. He is now responsible for implementing InfoCision's continued expansion and overseeing the deployment of all new call centers.

As a member of the American Teleservices Association (ATA), Direct Marketing Association (DMA), International Customer Service Association (ICSA) and Society of Consumer Affairs Professionals (SOCAP), Steve has worked to encourage other industry leaders to get involved in promoting ethical business practices. He has served on the ATA's state, national and executive boards of directors, and currently chairs the ATA Non-Profit & Charities Committee.

Kent Charugundla
Eagle IP, LLC

Kent Charugundla is a telecommunications entrepreneur and the founder of Eagle IP, LLC. Kent is a veteran of the telecommunications industry, and is also the founder of Eagle Teleconferencing Services, and Eagle Communications. Eagle Communications Inc., headquartered in New York, is a facilities-based CLEC (Certified Local Exchange Carrier) that offers data, voice and co-location services to business customers, including medium to large Internet service providers.

Citrix Systems, Inc.

Citrix Systems, Inc., founded in 1989, is a global leader and a trusted name in on-demand access. More than 180,000 organizations around the world rely on Citrix to provide the best possible access experience to any application for any user. Citrix customers include 100 percent of the Fortune 100 companies and 98 percent of the Fortune Global 500, as well as hundreds of thousands of small businesses and individuals.

Convergys

A global leader in outsourcing, consulting and software solutions, Convergys combines its industry experience, leading-edge software, operational expertise and world-class facilities to help clients create valuable relationships with their customers and employees. Convergys fully analyzes its clients' business challenges and leverages more than 20 years of industry and operational experience to recommend, design, implement, and often manage solutions in three business areas: customer care, HR business process outsourcing (BPO) and billing/BSS.

Dominic Dato
Founder and CEO
Teleperformance USA

With 18 years of contact center industry experience, Dominic has held executive positions for top-

rated contact center agencies throughout his career. Dominic founded Teleperformance USA in 1993 and under his direction, the company has grown significantly, becoming one of the top-rated contact center outsourcers in the industry. With Teleperformance USA, Dominic has built a strong foundation based on a client partnership approach, dedication, processes, industry experts and a unique understanding of delivering outstanding client success.

Jack Early
President
Ching Long Capital & Distribution

Jack Early started his entrepreneur career as a cofounder of a sweat equity start up called Early Cloud & Co., a software company that pioneered the first integrated sales and marketing systems in the call center industry. He is considered to be an expert in the areas of e-distribution systems and multichannel sales marketing and technologies that support e-business. Early Cloud and Co was sold to IBM in 1995, and subsequently Early consulted with many Fortune 500 companies; the most significant engagement was with IBM.

In 1996, Early and his wife felt the need for a sabatical and chose teaching in China as the venue, an experience that has offered a unique perspective on Chinese culture and the rapid economic expansion inside China. Since his return from China, Early has been an investor in multiple start up companies.

James D. Foy
President, Chief Executive Officer and Director
Aspect Software

Jim Foy brings more than three decades of software industry expertise to his role as President, CEO and Director of Aspect Software. Jim joined the company in 2001 and, under his direction, the company has become the world's largest company solely focused on the contact center industry. Foy's continued vision for Aspect Software is to help its customers gain competitive advantage with solutions that enable more effective and efficient customer-company interactions.

During his career, Foy has held several executive positions at leading enterprise software companies. Prior to Aspect Software, he served as President of Informix Software. He also served as the Executive VP of Engineering at Ardent Software; the Founder, President and CEO of Constellation Software; and Director of Research and Development at Prime Computer. While at Prime, he was also a member of the board of directors of X/Open and Unix International.

FrontRange Solutions

Founded in 1989, FrontRange Solutions develops software and services that allow organizations to deliver extraordinary customer relationships. Since its inception, the company has focused on solutions tailored specifically to the mid-market, and today it has more than one million users and a marquee client list. FRS products increase productivity and customer satisfaction and service. FrontRange product families include: GoldMine for business relationship management; IT Service Management with HEAT and ITIL standards-based modules for complete service management; and IP Contact Center for reduced telephony costs and increased agent productivity, streamlined customer service and communications; and Infrastructure Management, which provides the ability to optimize the full lifecycle of a company's assets.

Ray Golden
Senior Vice President, Blended Solutions
InPulse Response Group

After serving in the Air Force during Vietnam and completing his education at the University of Nebraska at Omaha, Ray Golden began his telemarketing career in 1982 with Steve and Sheri Idelman, Gary and Mary West and Jim Lynch at WATS Marketing of America as a National Accounts Manager. In 1986, Golden was promoted to VP of Sales at WATS Marketing and remained there until May of 1990, when he left to once again join Gary and Mary West at West Corporation, where he remained for the next 14 years.

Over the past 24 years, Ray has represented some of the most recognizable 800 toll-free Direct Response Television programs. He has been a featured speaker for the Direct Marketing Association and the Electronic Retailing Association, and has authored several articles on telemarketing and direct response television. In January, he joined Steve Pittendrigh, CEO at InPulse Response Group, as Senior VP of Blended Solutions.

Ray Hansell
Chairman
MaraStar Communications

Ray Hansell has been involved in the teleservices and direct marketing industries for over 25 years. He was the CEO of RMH Teleservices, an international call center operation that he co-founded with his partner MarySue Lucci in the mid 1980s and took public in 1996. During this same period, he also performed consulting services for dozens of Fortune 500 companies regarding their in-house call center operations. Currently, he is the chairman of MaraStar Communications, a direct marketing software company he co-founded in 2000. MaraStar produces animated training and communications products that are used in training and motivating employees, particularly those in the call center industry.

Sheri Idelman
Vice Chair, Chief Operating Officer, Co-founder
Solutionary, Inc.

Sheri Idelman is Solutionary's Vice Chair and COO. She is responsible for building the corporate infrastructure and processes required to deliver top quality, high-volume managed security services. Idelman brings more than 20 years of experience in the information and customer service industries as a successful entrepreneur and executive. Prior to co-founding Solutionary, Idelman was an investor and consultant involved with several Internet and wireless companies. In early 1986, she co-founded Omaha-based ITI Marketing Services and was the company's COO from its inception through 1995.

Steve Idelman
Chairman of the Board, CEO, Co-founder
Solutionary, Inc.

As Solutionary's Chairman of the Board and CEO, Steve Idelman is responsible for setting corporate direction and strategy. With over 25 years of experience as a successful entrepreneur and CEO, he is known for his leadership skills, business management expertise and vision. Prior to co-founding Solutionary, he was an investor, board member and consultant working with select Internet and technology companies. Prior to that, Idelman co-founded Omaha-based ITI Marketing Services, which provided managed marketing and information services to Fortune 500 clientele. **CIS**

Customer Inter@ction Solutions' Seventh Annual CRM Excellence Awards, Part I

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 One 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 will be presented in two parts, to be continued next month in the June 2006 issue of *Customer Inter@ction Solutions*.



1 2 1 Direct Response

Various cable-based services, including video, high speed Internet and VoIP

<http://www.121directresponse.com>

(news - alert) The cable company that engaged 1 2 1 Direct Response's services wanted to reduce service cancellations (churn), which tend to be high within the first 30 days of installation, whether for brand new service such as cable TV, or high-speed Internet installation (new or add-on to video). As a result of the program formulated by 1 2 1, initial customer churn (cancellation rate) was reduced by 10 percent. Furthermore, ongoing feedback from the program has led to new technician training programs, post-installation technician evaluation programs and new installation policies and procedures aimed at reacting to customer feedback provided by the program. Of those customers who accepted win-back offers made by 1 2 1 through their cable company's local customer service, 51 percent signed and returned the agreement as a result of the total turnkey back-office support 1 2 1 offers its client. The call-backs contributed to approximately 30 percent of that win-back rate. The results are expected to climb as this specialized group of saved customers goes through the entire cycle.



Alorica, Inc.

Helix by Alorica — Helix CRM 1.5

<http://www.alorica.com>

The client, ([news](#) - [alert](#)) which produces display monitors and peripherals, amusement products and imaging system software, recognized the need to increase efficiency and enhance quality in service solutions. Additionally, due to the extensive research and development program the client delivers to build superior products that are safe to use in even the most fragile medical environments, the company needed a solution to provide the industry's best in service while maintaining a cost-effective model. The company turned to Alorica to enhance their customers' experience by providing CRM excellence through service and technology. Helix CRM 1.5 was built to accommodate high-profile clients with very unique service needs. The application includes customized call-tracking features, call history analysis and customer profile data reporting, service request creation and lifecycle tracking, troubleshooting tools, and a specialized RMA feature that adapts to accommodate high-priority clientele. The client reports, "Because of the efficiency of the Helix CRM 1.5 software, we have significantly improved quality and efficiency for the customer. Alorica's solution has lowered abandon rates and freed our staff, allowing the agents to focus on our more serious issues and go above and beyond with clients to improve quality."

AMC Technology

AMC Multi-Channel Integration Suite

<http://www.amctechnology.com>

The client ([news](#) - [alert](#)) is an information services company that provides product, service and training solutions to automotive retailers and original equipment manufacturers. The company embarked on an initiative to increase customer satisfaction. The initiative included improving contact center capabilities for better support of one-to-one personalized customer relationships. To this end, the company decided to upgrade its

telephone system to an Avaya DEFINITY G3, as well as to implement new software and system technologies from SAP, including mySAP CRM. The critical issue became how to effectively implement these new systems while maintaining the established agent-customer relationships. Working together as a team, Avaya, AMC and SAP identified the specific needs of the client's contact center and addressed customer service requirements. The team then developed an implementation strategy that would enable the client to streamline its contact center operations and process incoming calls more efficiently. Post-implementation, the client reported improved contact center capabilities to support one-to-one customer relationships; the implementation of tested, certified Avaya and SAP partner solutions; automatic look-up of business partner record in mySAP CRM; intelligent routing of incoming calls to designated agents; simultaneous delivery of call and call attached data to agents' desktops; a single agent desktop for greater ease-of-use; and immediate costs savings with fewer toll-free numbers.

Amcat

Amcat Contact Center Suite

<http://www.amcat.com>

The client, ([news](#) - [alert](#)) a coin and bullion reserve company, required an inbound and outbound communications solutions for its call centers. Because of the nature of their business, the company required more than a contact center, as the lifeblood of their business depended on true customer communication. The client worked with Amcat to implement a customer history and profile information system within their inbound/outbound contact management system. Amcat Professional Services created new SQL tables and stored procedures along with new Web-based screens that would be displayed on the sales person's Amcat Agent Contact desktop. The Web pages are dynamically generated and contain the customer history of previous purchases for the customer being contacted. The

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sales person can now view the customer's previous purchases in seconds and prepare for the call in real time. The client reports that it is ecstatic about how the Amcat partnership has helped the company improve business processes that enhance business services and have a direct impact on revenue. The new system helps them capture and display customer and product information, streamline processes and analyze information to make decisions.

Amdocs

Amdocs CRM

<http://www.amdocs.com>

The client, ([news](#) - [alert](#)) a mobile operator in Moscow, was experiencing rapid growth — from 2 million in 2005 to 3.3 million subscribers in just over one year. The company required a system that was flexible to support all future subscriber and service growth, as well as a single system that could support the company's entire customer-centric operation. The client implemented Amdocs CRM to solve their business issues. Amdocs CRM consolidates all client data into a single, unified platform and can be fully integrated with existing pre-paid and post-paid billing systems. With the installation, all customer service representatives have access to timely and up-to-date customer data, enabling them to respond quickly to customer requests and provide a high level of customer service in line with global standards. Following the installation of Amdocs CRM, the client experienced not only an increase in subscribers, but it also helped the provider achieve transparency across all operations. Call handling time decreased by 62 percent within a month of the system being introduced. Call resolution time decreased by 60 percent and response time to departmental problems, such as billing-related issues, credits, etc., improved by 80 percent.

Antenna Software

Antenna A³ Mobile Sales Intelligence

<http://www.antennasoftware.com>

The client, ([news](#) - [alert](#)) a provider of handheld communication and organization devices and accessory solutions,

found that its sales force had tripled in size in order to take advantage of the smart phone sector growth. But with the growth, many challenges arose. The client's sales organization managed multiple end-user customers, carrier constituencies, developers and solutions partners simultaneously. Said the client, "Long sales cycles are a thing of the past; we needed to be much more on top of our business, and understand from a forecasting perspective where we were." The company chose Antenna A³ Mobile Sales Intelligence, a solution that provides real-time interaction with Siebel CRM OnDemand across any carrier network to the company's devices. Antenna's A³ MSI fully enabled the client's sales force to get a deeper look into the sales pipeline and sales activities, and to have a tool for remote users who were out of the office. Sales reps can now pull data out of their CRM solution back into the mobile client at any time. As a result of the increased functionality, the client's sales reps have increased effectiveness and efficiency in closing deals faster. "From a solutions perspective, from a solving business problems perspective, the new Antenna A³ Mobile Sales Intelligence solution helped sales teams identify the kinds of solutions being deployed at any given time and from almost anywhere," said the client. "Because of the improved data capture, they now have a better understanding of what the solutions were that helped them solve business issues and to deploy more broadly."

APAC Customer Services Inc.

Virtual Agent Service

<http://www.apaccustomerservices.com>

The client, ([news](#) - [alert](#)) a newspaper, had a stated mission to be the leader in providing news, information and marketing services to customers in their region. APAC and the client partnered specifically to improve upon the quality of the subscription management process and the impact on the subscriber base. The client also turned to APAC to help resolve subscriber billing issues; initiate

vacation stops/starts/holds; manage and resolve delivery issues; resolve and dissuade complaints about the paper and manage any other service-related issues. By transitioning their subscriber care to APAC, the newspaper noted a 20 percent increase in call handling efficiency. APAC instituted a quality feedback program and rewrote the newspapers' representative training to further enhance the subscriber experience. After the initial project was finished, APAC again came to the client with a new approach to virtual representative services that would help improve the processing capabilities of the client's subscriber care by implementing its atHome Services capability. APAC's atHome Services unit allowed the newspaper to meet higher levels of productivity and greater call handling efficiency. The home agent solution improved call handling efficiency by nearly eight percent; provided a disaster recovery solution; helped improve service levels; and reduced call abandonment by 20 percent.

Aplicor

Aplicor CRM

<http://www.aplicor.com>

The client, ([news](#) - [alert](#)) a financial services company, implemented Aplicor's Web-based CRM system in 2005. The objectives of the implementation were to achieve a holistic (centralized and enterprisewide) view of the customer, increase customer satisfaction (and longevity), increase customer share and present a single face to the customer regardless of the person or location providing service. The client reported that for the first time, it retains a complete and real-time view of each customer relationship in a centralized system and for all staff regardless of line of business, location or time zone. The company's users and management achieve real-time visibility to customer and prospect activities, sales pipeline maturation, salesperson effectiveness, customer evolution and customer support resolutions. All staff members are aware of all customer interactions from anywhere in



the company, and each employee is speaking to the client with a consistent and informed voice.

Aspect Software

Aspect eWorkforce Management

<http://www.aspect.com>

Aspect ([news](#) - [alert](#)) eWorkforce Management enables businesses to accurately plan, efficiently manage and optimize the performance of multi-skilled, multichannel, multi-site and outsourced staffing resources. The client, an automotive credit company, is focused on improving the customer experience through customer service or collections interactions. The company determined it needed a solution that would enable them to optimize their agent resources, gain greater control over agent scheduling, cut costs and improve customer service levels. As a result of the implementation, the client has seen increased productivity and revenue, improved customer service and agent performance, reduced staffing and operations costs, increased profits and customer satisfaction, as well as rapid return on investment. Specifically, the company has seen an 80 percent reduction in the time contact center supervisors are spending creating and managing agent schedules. They have also enjoyed a 23 percent increase in service levels, based on the percentage of calls that are answered within 60 seconds. In addition, the client has been able to reduce the average speed of answer by 138 seconds in the customer care group and by 60 seconds in the customer accounts group.

Astute Solutions

ePowerCenter

<http://www.astutesolutions.com>

The client, ([news](#) - [alert](#)) an airline, had identified a host of service-related challenges which formed the basis of its global strategy to improve customer relations and service recovery. Astute Solutions and the client set an aggressive implementation schedule and deployed a team of professional services consultants and software engineers to roll out

its ePowerCenter solution at the major sites within a nine-month timeframe. Ultimately, Astute helped the airline reduce its technology platform from 11 systems to one, creating an understanding of costs and control across global customer relations in the process; non-integrated systems were replaced by a single application running against a single database that is now being used in over 20 countries; and Astute used leading-edge technology to cache agent content and pass only dynamic traffic over the network — ePowerCenter met the client's 99.9 percent reliability contractual stipulation.

Before The Call

Before The Call

<http://www.beforethecall.com>

The client, ([news](#) - [alert](#)) which delivers personalized, multichannel automated information solutions to enterprises and network service providers, knew that its sales reps were not effectively using Salesforce.com in conjunction with the other sales tools at their disposal. They lacked a cohesive strategy for lead qualification, so reps were cherry-picking leads based on their own knowledge of the market. Lead management and processing was inconsistent, so too much time was being spent researching leads that turned out to be inappropriate, and not enough time was spent pursuing leads that were of potentially high value. After evaluating a number of sales intelligence solutions to address these issues, the client chose Before the Call because of the seamless integration of the Before the Call solution, mitigating the ramp-up time of the reps, best-known data sources available without leaving Salesforce.com, and the ease of the configuration to meet their specific business needs. This resulted in immediate return on investment using Before the Call. Says the client, "It's an amazing product that no sales organization should be without. Today's world is about doing more with less, and Before the Call is a solution that allows my team to make the best use of their time

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and allows us to focus on those opportunities that will have the greatest impact on revenue.”

Centive

Centive Compel

<http://www.centive.com>

The client, ([news](#) - [alert](#)) a provider of storage, backup and recovery solutions, had sales compensation plans that were managed by two separate systems — a series of Excel spreadsheets and a commercial solution from a leading ERP vendor. Because both systems required so much support from time-constrained IT resources, plan changes and new plan setup were cumbersome and required advance planning. Administrators ran manual credit assignment processing in MS Access, followed by manual reporting and approval processes. After evaluating several vendors, the client concluded that Centive’s on-demand sales compensation management system, Compel, could meet all of their needs and was by far the best match across all criteria. Post-implementation, the client was impressed to find that configuring a compensation plan in Compel takes literally five minutes and requires no IT support or programming knowledge. The client realized significant improvements in process efficiency. As result of the automated, daily transaction feeds and real-time visibility, the reduced number of dispute incidents and time to setup and update compensation plans, in the first six months the client saved over 3,000 hours in inputting data; 390 hours in preparing, validating, running and publishing reports; 200 hours in commission dispute resolution; and 120 hours in configuring and updating compensation plans.

Chordiant Software, Inc.

Chordiant Decision Management (DM)

<http://www.chordiant.com>

Chordiant’s ([news](#) - [alert](#)) Decision Management helped a large wireless provider talk to its customers directly about what they wanted and needed. It had the effect of making the interaction

very personable and manageable, with all the information needed in one place. The client has seen its response rate of less than two percent increase to over 50 percent with inbound micro DM combined, with an impressive sales conversion rate of 56 percent; for certain products, the rates were even higher, and a single-day conversion rate peak at 64.1 percent. Return on investment (ROI) was projected at 2,500 percent, based on current results. Closed-loop reporting also indicated three percent average revenue per user (ARPU) uplift, not including customer retention benefits and customer experience measures. The wireless provider has also abandoned its average handling time (AHT) measures in the call center, focusing on quality over quantity. The prediction process now takes one-seventh of the time it used to.

Citrix Systems

Citrix GoToAssist 7

<http://www.citrix.com>

The client, ([news](#) - [alert](#)) a business services firm, discovered Citrix GoToAssist to provide real-time remote support to clients each day. With proprietary screen-sharing technology and best practices support tools, consultants securely share a client’s server or desktop just as if the consultants were actually on-site. A consultant can assist clients immediately by working from home using Citrix GoToAssist. “For issues that were previously handled over the phone, we have cut the resolution time by as much as 75 percent,” said the client. With a typical round trip to a client averaging two hours, travel costs added up rapidly. “Because we charge clients for travel time and mileage, using Citrix GoToAssist saves them [consultants] money,” the client said. Issues that previously required hours of travel can now be resolved in minutes. With consultants traveling less, the company can spend more time on higher-value consulting services.

ClientLogic

ClientLogic Customer Care Solutions

<http://www.clientlogic.com>

The client, ([news](#) - [alert](#)) a provider of cable TV, high-speed Internet and telephone services, chose ClientLogic for its reputation of helping clients reduce costs and improve customer satisfaction as well as working with clients to determine the best strategies to help them continue to be successful. Since the successful initial program was instituted, the client is constantly updating products and introducing new services to keep pace with the industry. The client company reports that ClientLogic has been very successful in keeping abreast of all changes in order to best serve customers. Since the client’s business continued to grow, more calls were transitioned to ClientLogic, leading to the outsourcer handling 50 percent of the client’s total calls. Since partnering with ClientLogic, monthly customer surveys have consistently shown 90 to 92 percent customer satisfaction.

Cross Country Automotive Services

24-Hour Roadside Assistance

<http://www.crosscountry-auto.com>

The client, ([news](#) - [alert](#)) a large automotive retail and service organization, manufactures multiple vehicle brands, directs operations in over 30 countries and sells its products in 200 countries. To support its mission, the client provides round-the-clock roadside assistance services 24 hours a day, 365 days per year to their customers. A partner was needed that could rescue the customer in the event of a vehicle breakdown, and through flawless execution of service delivery, turn that negative event into a positive, brand-building experience. The success of the program was measured through customer surveys. On a monthly basis, approximately 9.8 percent of customers serviced through the program opt to participate in the survey. The average weekly top box satisfaction score for customers that utilize the roadside assistance program is 87 percent for the last 52 weeks. The top two boxes

overall satisfaction score has an average of 94 percent for the last 52 weeks. On average, the top box and top two box satisfaction scores for customers who were serviced by mobile dealership personnel increased five additional percentage points. As a result of CCAS's service, more than two out of every three customers who experienced a vehicle breakdown during their warranty period indicated they would return to the brand to purchase their next vehicle.

Customer Direct

Inbound Customer Care For The HSIA Industry

<http://www.customerdirect.com>

Together, Customer Direct (news - alert) and the client, a large provider of HSIA (high-speed Internet access) technology to the hospitality industry, began to lay the groundwork for a holistic guest support process, with a clear program purpose: "Building guest loyalty for hoteliers." Since launching in early 2005, the program has grown to support in excess of 100,000 hotel rooms; from Hong Kong to Great Britain, and from exclusive five-star mega-properties to roadside inns. Each month, the guest program cares for tens of thousands of hotel guests and their need to stay connected with their office, home, e-mail, and lives. In excess of 90 percent of calls are resolved on a first-call basis, and over 99 percent of trouble tickets are recorded as "happy" or "very happy" in regards to guest mood. The tremendous growth of 2005 is expected to double in 2006, and is a testament to a process for guest satisfaction that works.

Echopass

Echopass Contact Center On-Demand

<http://www.echopass.com>

Almost immediately, Echopass (news - alert) Contact Center On Demand produced the efficiency the client, a hotel group, was looking for. "We quickly reached the 50 to 60 percentile range for conversion of calls to bookings — that's unusually strong for the hospitality industry," reported the client. In

addition to meeting desired call center standards for transactions per hour, calls handled per hour and average call answer times, the client also noted that Echopass Contact Center On Demand's *ad hoc* reporting features help keep their business's quality assurance efforts on track. Department supervisors can easily monitor both overall system and individual agent performance, ensuring consistently high service levels and pinpointing problem areas should they arise.

eGain

eGain Service 7

<http://www.egain.com>

(news - alert) To remain on the competitive edge, the client, the IT branch of a large multinational financial services/mortgage company, had to find a way to offer value-added services to financial products that have become near commodities. The management team recognized they had to expand their institution's service capabilities and improve ease of use and efficiency without increasing expense. Their goal was to create a multichannel customer interaction hub that would allow them to offer customers new interaction options such as self-service, chat and e-mail. It would have to work within the existing IT environment, enable agents to handle multiple service channels easily, and give clients the option of quickly and securely accessing information and services on their own over the Internet. By deploying relevant components of the eGain solution, the client reports that it has set new customer service standards in the financial services industry and now offers electronic banking services such as cash management to a range of customers. Following deployment, the customer base has continued to expand, while the number of customer service agents has remained constant. The Chicago-based customer service team has exceeded performance goals in virtually every area of activity, including response times and customer inquiries handled per agent.

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Empirix

Empirix Service Assurance for Siebel

<http://www.empirix.com>

([news](#) - [alert](#)) Recently, a well-known bank decided to upgrade its customized Siebel Call Center application — a critical enabler for quality customer interactions. Based on their past experience with upgrades, pre-deployment testing quickly became a top priority. The financial services company had experienced challenges with a previous upgrade of their CRM application. At that time, its strategy had been to focus most of its testing efforts on the agent desktop (CRM application). In addition, some of the telephony components were manually tested in isolation. Empirix developed a comprehensive test plan that was to generate production levels of inbound caller and agent desktop traffic. The result of the test was a detailed data set on system performance and a report that highlighted opportunities to tune the application for even better performance. In this case, the testing verified that performance was excellent and that the system would in fact support the financial services company's expected call volumes. As a result, they could deploy with confidence, and the client's Siebel Call Center upgrade was flawless. In fact, the company reported that, "It was the smoothest rollout we've ever had."

Envox Worldwide

Envox CT Connect

<http://www.envox.com>

The client, ([news](#) - [alert](#)) a utility company serving over two million customers, needed their agents to be more productive in order to handle their high volume of calls. To solve the problem, the utility chose Envox CT Connect to implement an agent screen pop solution. It captured the automatic number identification (ANI) from their Avaya Definity G3R PBX and used it to look up customer information in their CRM database. As the agents received the calls, they were also provided with the customer's account profile and recent

history, including any interactions with IVR self-service applications. Because Envox CT Connect provides an open, standards-based method for communicating with their Avaya PBX, the company has been able protect its development work as it provides compatibility with over 30 different traditional and IP-PBX models. The agent screen pop solution has made a positive impact on the utility's service organization. It allows agents to begin resolving issues immediately, without wasting time asking for account information. Because they have access to history information, agents are better equipped to understand what has happened with the account and how best to provide assistance. The screen pop application has reduced average call time by 15 to 20 seconds. This not only represents a significant cost savings, but also has enabled the company to handle higher call volumes without increasing staff.

Epicor Software Corp.

Epicor CRM

<http://www.epicor.com>

The client, ([news](#) - [alert](#)) a software company, reports that now, whenever a support or sales representative talks to a customer, the agent can easily access notes on the customer's account, complete call history as well as training information. The client's customers appreciate the fact they don't have to spend time repeating themselves or bringing somebody new up-to-speed on an issue every time they call. The client also installed Epicor CRM Conductor, a companion product to Epicor CRM that is used to automate workflow processes based on user-defined criteria. The client set up Conductor to notify key individuals and team leaders whenever a call has been in the call queue for 60 minutes, or when a call remained unresolved for seven days. With Epicor CRM Conductor, call activity improved almost immediately. The client also automated its training setup process, including class registration and confir-

mation, and also helps manage the company's custom programming projects. Through these automated reminders managed through Epicor CRM, the client is seeing a faster response from customers who are sent quotes for custom programming projects.

etalk

Qfiniti

<http://www.etalk.com>

As a result of [etalk's](#) ([news](#) - [alert](#)) Qfiniti product, the client, a financial services provider, has experienced a two to eight percent gain in first-call resolution, depending on the line of business; it has seen its customer satisfaction increase more than six percent; and it has gained a better understanding of its customers' and distributors' needs. This improvement in satisfaction is also helping sales efforts. The company's two-pronged approach to sales includes cultivating new leads while strengthening established relationships with existing customers. "We're actually not trying to cast a wider net all the time, but rather work on the net we have to make sure that we're getting more of our fair share of the business with the relationships that we already have in existence," said the client.

eTelecare Global Solutions

Proprietary eTelecare Global Solutions CRM package

<http://www.etelecare.com>

([news](#) - [alert](#)) The solution is a CRM application that integrates all channels except posted mail into one unified desktop. The software is based upon the Microsoft DNA/.NET approach to building distributed systems. The solution helped a large wireless telecommunications provider successfully migrate 840,000 customers from one billing platform to another and sign them up for multi-year contracts. At the same time, eTelecare reduced the client's cost per accept by more than 56 percent, and enabled customers to migrate plans from their homes instead of requiring

them to travel to a client retail outlet, something the client originally did not consider possible. The proprietary CRM system helped eTelecare's agents increase their accuracy, reduce average handle times and provide superior customer service. During peak months, eTelecare handled more than 120,000 calls, resulting in about 72,000 renewals. Compared to the previous vendor, eTelecare achieved a 56 percent per-renewal reduction, saving the client about \$27 per retention. Overall, renewal rates have almost doubled since eTelecare started the program. In addition to the savings it offers, eTelecare's proprietary CRM system also enhances the customer experience by helping agents provide faster, more accurate service.

Excell Services

Medicare Discount Prescription
Drug Plan Call Center Services

<http://www.excellsvcs.com>

The client, ([news](#) - [alert](#)) a pharmacy benefits solutions company, provides services to millions of individuals; the client base includes several large health insurance providers, employers, union groups and third-party administrators. The client contacted Excell Services to gain assistance with handling incoming calls for the roll-out of the Medicare Prescription drug plan. Due to the difficult task of predicting call volume for information requests and enrollment calls, the client was looking for an additional outsource partner to be available for a limited amount of initial FTEs to handle the expected initial surge in call volume. For the start-up, Excell sent two trainers to the client's call center facility for two weeks to attend training and development courses. Time was spent learning the products and internal policies and procedures along with detailed information on Medicare, the healthcare industry, medical privacy laws and the specifics of the client's discount pharmacy plans. Excell Services was able to extend the amount of hours the client's call center remained open, boosted the number of calls handled

from 2,500 per week to 16,000, met or exceeded quality insurance scores of 94 percent, and attained an average speed-to-answer of under 30 seconds.

FrontRange Solutions

GoldMine Corporate Edition

<http://www.frontrange.com>

The client, ([news](#) - [alert](#)) a provider of fitness equipment and programs, was often beholden to a busy schedule of trade shows and outreach efforts. However, without a system for tracking

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prospects and follow-ups, the company found its hard work often didn't pay off as anticipated. The client then integrated GoldMine Corporate Edition with QuickBooks and their UPS shipping program to enable single data entry, and brought in QuoteWerks software to take the place of Excel spreadsheets for creating and storing quotes. As a result, GoldMine has become the single interface for everything the company does, with information easily pulled into the client's other critical business applications. Today, nearly every employee in the client organization actively uses GoldMine, from sales to shipping. Seven remote sales reps stay connected with the rest of the team with regular synching of customer data. The company logs every detail about prospects and customers in the software, and can access it in seconds when needed.

IEX Corp.

**TotalView Workforce Management
Version 3.9**

<http://www.iex.com>

The client company, a large power producer in South Africa, stated that since implementation of TotalView Workforce Management, it has come a long way from its roots with an annual master schedule (its former method of scheduling the workforce). Central schedule coordinators monitor forecasts, plans and overall schedule performance while local managers supply schedules to their agent groups. Accuracy is measured both daily and at 30-minute intervals, providing instant visibility and feedback to coaches and floor managers. By tying the detailed skills capabilities of agents with sophisticated planning and forecasting, the client has attained a forecast accuracy rate of 95 percent, week-to-week, with fit to schedule averaging 85 percent. Overall scheduling performance has exceeded expectations in 8 of 12 months. "We can now adjust our schedules to meet the needs of the business, as well as the employees," said the client.

InfoCision Management Corp.

Digital Phone Consumer Prospecting

<http://www.infocision.com>

(news - alert) More than 24 years of

managing customer relationships has made InfoCision the ideal CRM partner for the client, a large cable company. InfoCision's Communicators were the mature, intelligent, professionally trained telephone agents that the client required and InfoCision's quality assurance system assured consistency in performance as well as a platform for continuous improvement. In the first phase of the campaign to win customers to cable Internet and digital phone service, InfoCision called on the client's "expanded basic" customers. These were households that had a basic cable package consisting of fewer than 100 channels and with no premium movie channels, sports packages, cable Internet connection or other digital packages. In the second phase, InfoCision contacted customers who already had digital cable service and offered them cable Internet and digital phone service. On all goals set for the program: cost per sale, sales per hour and response rate, InfoCision exceeded the client's expectations. Because of this program's success, InfoCision has partnered with the client on its outbound prospecting, win-back sales, survey and welcome calls, inbound sales retention and customer service.

Inter-Tel, Incorporated Inter-Tel Axxess Converged Communications System

<http://www.inter-tel.com>

(news - alert) After evaluating products from a number of vendors, the client, a grocery merchandising and warehousing company, chose Inter-Tel to supply its new communications solution. Inter-Tel offered the technology the company was looking for — including advanced voice over IP solutions and powerful IP-powered applications — to help improve its business processes. Another deciding factor was the scalability, flexibility and compatibility of Inter-Tel's technologies. The client liked the fact that it could take advantage of emerging products and applications when its business dictated, and not be forced into using undesirable or unnecessary technology because of technical constraints often imposed by other vendor solutions. "In the past," said the client, "installing the pricing application usually translated into a full day at the

customer site to configure the software and train the staff. It was a very expensive and laborious process. With Inter-Tel Remote Support, we're able to install the application, train the employees and answer any questions in a fraction of the time. From an efficiency and cost perspective, this application has paid for itself many times over."

LivePerson

Timpani Sales & Marketing

<http://www.liveperson.com>


The client, (news - alert) a pure online retailer focused on outdoor gear, initially implemented LivePerson's click-to-chat technology in 2002, and discovered that numerous chat interactions resulted in sales and improved customer satisfaction ratings. An established industry innovator and early adopter of live chat, the online retailer recognized that chat could also serve as a valuable tool to improve conversion rates; however, the existing solution was designed to satisfy customer service requirements and lacked the capabilities to serve as a major sales catalyst. To maximize revenue and leverage the unique expertise of its employees, the client again turned to LivePerson to transform the chat deployment on the organization's family of Web sites from a pure customer service application to a proactive sales solution affecting bottom-line results. In addition to equipping the client with intelligent technology to proactively engage and consult with qualified customers online, LivePerson supplied comprehensive training to ensure that personnel assigned to the chat channel would take full advantage of their new online engagement and interaction tools. Post-implementation, the conversion rate for chatters grew to 10 times greater than self-service channel conversions.

CIS

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Searching For The V In CRM?

Consider VCM

Customer relationship management (CRM) is grabbing the attention of business leaders who wish to instill customer-centric business models. Their concern, however, is how to determine what the value of CRM is both for their organizational effectiveness as well as for their customers. Value chain management (VCM), which focuses on value creation and process optimization, offers a new approach to leverage CRM investments and produce greater value output for both companies and customers.

Customer contact center solutions are increasingly taking center stage in terms of their contribution to value creation and process efficiency. Certainly, the new VoIP-based solutions offer significant technical and cost-savings advantages, but more importantly, their enhanced features suggest that we should rethink the objectives for CRM and how it fits in with the corporate organization and goals.

In this article, we'll look at a traditional interpretation of CRM and suggest how VCM can reposition CRM to become an infinitely more valuable tool. We'll list some of the new call center capabilities that enable companies to use CRM as a competitive differentiator and close with some immediate and long-term considerations on the value assessment of CRM.

Traditional Interpretation And Valuation Of CRM

Thirty years ago, we saw the emergence of call centers in the form of outbound telemarketing (telesales) centers, and inbound call service centers that handled customer orders and inquiries. Over the next two decades, these activities became increasingly more automated and sophisticated with, for example, the introduction of interactive voice

response (IVR) systems in the 1980s and computer-telephony integration (CTI) systems in the 1990s. Little by little, CRM platforms emerged to more effectively manage customer interactions and to drive companies to become more customer-centric. The role of the call centers evolved into responding to customer needs while supporting customer satisfaction, customer retention and revenue objectives.

With the hefty price tag of building and staffing call centers, the expectation for a positive return on investment has caused the mission of call centers to predominantly shift towards "hybrid revenue channels." CRM, in support of the ROI maximization objective, has evolved into elaborate database warehousing systems documenting customer profiles (including history, preferences, financials, profitability and customer lifetime value assessments). This trend has been accentuated with the increasing popularity of the Internet and its use in CRM platforms. Companies use the Internet to gather and mine more customer data, rely on it increasingly as a sales interface, and have gotten into

the habit of referring their customers to their Web sites for self-help, support and assistance.

From that perspective, investments and upgrades of CRM systems become a tactical choice. Business leaders will choose to spend money on either salespeople, marketing, Internet applications or call centers, depending on which they believe has the greatest potential for growing profitable revenue streams. Their blending of these options without a careful strategy of what they intend to accomplish with each of the customer-facing channels is most likely why most of us still frequently experience sub-par satisfaction from our interactions with customer call centers. As long as companies cannot perceive the distinct value that CRM produces for them, it is unlikely that customers will get much value from dialing their call centers.

But this should not be the case. While parallels and similarities exist in the functions, missions and objectives across the sales, marketing and service organizations, companies cannot let those considerations become a blur. Instead, companies should cultivate the distinctive characteristics and capabilities of their respective customer-facing resources for the benefit of more valuable and diverse customer interactions.

By Xavier Van de Lanotte
VXTConsulting, Inc.



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They should develop a plan to optimize their resource allocation in a way that will promote synergy and coordination.

Repositioning CRM With VCM

Value chain management enables companies to maximize customer value at the overall lowest cost. Resources are aligned to cost-efficiently service customer segments in a manner that boosts the overall value derived by customers from their relationships with their suppliers. Through strategic relationships and collaborative management, companies develop capabilities and engage resources within the value chain to meet their customer value creation and

resource optimization objectives.

Companies gain strategic advantages from higher customer satisfaction, integrated and cost-efficient processes, market access and growth opportunities, and greater insight and expertise of customer solutions.

CRM offers significant potential as a strategic tool to value chain management and plays a substantial role in establishing a company's competitive positioning. Like any activity in the value chain, CRM and customer-facing resources must produce value for the customer. Failure to produce value for customers makes CRM unlikely to produce value for the company, either.

Customers derive value from one or several of the following sources in their relationships with suppliers:

- Intrinsic product and service attributes (including service and performance, relative to price) and platform characteristics;
- Learning, knowledge and information transfer, and solution development;
- Acquisition/purchasing and decision making processes;
- Ease of implementation, management, maintenance and repair;
- Supplier capability, consistency and dependability; and
- Nature of the relationship/business model with the supplier or vendor.

With the VCM approach, companies seek to encapsulate and address the customer experience with reference to their products or services in the context of the global solution. They consider the customer experience from multiple levels (including end-users, decision makers, the accountant, the systems maintenance department, etc.) and focus their activities on making the experience at each level (moment of truth) hassle-free and economical, thereby creating more value for their customers. They do so most effectively by engaging other members of the value chain (e.g., suppliers, distributors, vendors of peripheral systems, etc.), the value chain representing the sum of all activities going into the global customer solution. Through value chain relationships, they share knowledge and objectives, and collaborate to optimize the end-to-end customer solutions.

Companies must consider how their customer-facing resources complement each other and how a CRM platform can most effectively and efficiently channel the desired value to customers. Instead of looking at call centers as overlay sales initiatives and/or cost centers, companies should consider call centers channels producing and delivering value. By using value chain management, organizations can effectively determine how value activities are best distributed and coordinated across organizations and the value chain in order to provide cost-effective service and support to their customers.

Customer call centers should be vested with a true operational mission and must be given appropriate customer value creation objectives. Their role and functions should be realigned within the organization of the corporation. Only then, can we assess their contributions in efficiency and productivity gains to the sales and operations functions; and it is only with that understanding that an ROI metric for CRM can begin to make sense. Below are some examples of how call centers controlled by an effective CRM platform

can produce real value for the customers and cost savings for the company. Well run contact centers:

- Complement traditional channels to perform selective functions addressing customer or segment specific needs;
- Manage various processes and access various tools and information within the value chain to resolve customer problems;
- Act as primary or alternate channel support systems;
- Coordinate in real-time various activities across the value chain to support the customer requests;
- Are an extension of the traditional sales channels for account management, promotional activities, renewal and cross-organizational sales;
- Provide pre-sales information and take/assist with routine sales orders;
- Perform service, post-sales support and account management services;
- Document customer requests and value activities performed/required to satisfy those requests; and
- Survey customer satisfaction, monitor trends in demand, maintain customer data repositories and generate leads.

In evaluating the potential returns of call centers, companies must consider the competitive advantages they can provide, and then compare their investments with the cost of alternative strategies to accomplish these same value objectives.

Catalyst Or Missing Link?

Today, new technological innovations are making these enriched missions and objectives of call centers and CRM possible, affordable and manageable. For those who think this is nothing but an illusion and believe that CRM and call centers are doomed because of their dubious reputation (i.e., pestering telemarketers, endless queuing, dropped calls, wrong agent, no help, etc.), think again! The truth is that building call centers and getting CRM right has been

Customer relationship management, whether formalized or not, is something that we all do each time we communicate with our customers and provide them with our products and services.

up until now quite challenging. Developing adequate call center capabilities has been impeded by the limitations of traditional voice telephony and its integration with other communication and productivity applications. Likewise, CRM has never lived up to its full potential (at least as theoretically conceived) because of the aforementioned limitations in technological capabilities.

VoIP technology is about to change that dramatically. It is the catalyst for providing more productive and efficient customer interaction systems. It is the missing link that brings together the totality of the customer-facing resources in a coherent manner required to unleash the potential of CRM. Following are some of the enhanced capabilities of call center solutions based on VoIP technology:

Routing and staffing. New routing algorithms allow companies to route customer calls to the best agent capable of addressing the customer's issue anywhere: remote call centers located around the world, agents at home, or other company employees designated to handle calls at peak call volume times. Prioritization also allows companies to discriminate routing of high-value customers or FAQ (frequently asked questions) calls.

Integration with databases and browser-based applications. Calls automatically trigger customer data to



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appear on the agent's computer display through screen-pop capability. Calls are shorter and less frustrating for the customer. Agents can access records of databases across various departments such as billing, shipping, technical, scheduling, sales, etc., to immediately address the customer's concern.

Convergence of CRM technologies

Phone, computer, video, Internet, productivity tools, databases, e-mail, voice mail and fax systems are using the same basic digitized technology. This facilitates the recording, storing, retrieving and communicating of the customer interaction sessions. Agents are supported by a multimedia platform and its broader set of tools to effectively communicate with customers.

Call handling, supervision and support. Call transfer and conferencing are easily performed without losing the call. Agents can place the customers in touch with other agents, specialists or supervisors wherever these individuals might be located. Improved recording capabilities add flexibility and quality of monitoring, training and documenting of call center activities.

Management and contingency.

Management and reporting can be done from a central location. Agents can be set up anywhere on a moment's notice to expand the call center resources, handle call overflow or deal with disaster recovery. Network and power outages can be dealt with by immediately rerouting calls to other resources.

Cost advantages. The following cost advantages can be attained:

- Network costs: use of Internet and IP VPN to route calls on a global basis;
- Management costs: centralized, easy to set up and maintain;
- Agent resource costs: lower-cost agents, part-time, at home, or use of other down-time employees;
- Real estate costs: remote and virtual staffing of agents;
- Licensing costs: systems allow tracking of software usage and sharing of licenses; and

- Investment protection: scalable and capable of migration or upgrade to any IP-based solution.

Value chain management stands to greatly benefit from the progress in effective management of customer interactions and relations as these become more meaningful and more apt at channeling value for both company and customer. Effective CRM capabilities and getting call center functionality right are a tremendous competitive differentiator and a credible positioning strategy.

Customer relationship management, whether formalized or not, is something that we all do each time we communicate with our customers and provide them with our products and services. From there, it is essentially a question of scale, which drives companies to more or less automate that process to cost-effectively achieve their objectives and their position in the marketplace. To determine the value of CRM, a company has two options:

- Consider CRM purely for centralizing customer documentation processes and spearheading telemarketing campaigns according to needs. In this case, a straight comparison between the return on a CRM investment and the return of alternative means to attain the objectives may be sufficient to determine whether CRM is the better option.

- Consider using CRM as a strategic tool to deliver incremental value to customers and drive greater efficiency and productivity across the corporation and the value chain as suggested by VCM. An "apples to apples" comparison is not possible here. Calculating the ROI on the CRM investment would require accounting for various productivity and efficiency gains as well as various contributions to revenue growth, margin retention and other competitive advantages. As VCM and CRM suggest organizational and business model changes, it's recommended that companies assess their

value based on gauging the organization's overall performance in terms of growth, profitability, customer loyalty and its ability to sustain competitive advantages.

According to the Gartner, contact centers will all eventually migrate to IP architecture. This technology will create more effective communication platforms, which will in turn progressively bring down the walls of the organizational silos. In a seamless environment, companies will need to rely on effective management tools such as CRM to control, coordinate and administer the interaction with their customers. Roles, objectives, processes and linkages will have to evolve, and organizations must embrace these new technologies and capabilities to achieve ever higher customer value objectives and cost efficiency.

Finally, the needs and behaviors of the markets move in sync. Some lag is attributed to technological lifecycles and the time it takes to implement new applications. However, customers are demanding more value from their relationships with their suppliers. If you are not focused on creating that value, are not linked with the value chain or have not acquired the means to manage the relationship and understand the need, what do you believe will be the resulting behavior when time runs out on you? **CIS**

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Overcoming The Hurdles Of VoIP Call Recording

Across the globe, voice over IP (VoIP) is now recognized as the next generation of telephony technology. Recent surveys have asserted that organizations of every size and nature are either investigating or implementing VoIP technology. The recording of voice and screen interactions has also become a standard procedure. Liability management, quality assurance, regulatory requirements and security issues are among the many reasons organizations worldwide are opting to record on a full- or part-time basis. However, even though VoIP telephony is now viable and relatively straightforward to implement, the recording of VoIP interactions is a little more challenging — a “one-size-fit-all” approach simply isn’t appropriate for this purpose.

There are various ways to record VoIP interactions. The right solution for your specific needs can be determined only by carefully examining the structure of your operational and IT environment, your call volume, the number of channels deployed and, of course, your reasons for recording. If, for example, you are recording for compliance and liability purposes, failure to record could have serious consequences, in which case it’s imperative to understand your options and choose wisely.

Think Ahead

[VoIP \(define - news - alert\)](#) and contact center technologies continue to evolve at a rapid pace. As a result, it’s extremely important to think about the future when choosing a VoIP recording solution. Is there a chance that you’ll employ an 802.11 wireless network? Will you ever adjust your compression

rates as technology evolves? Do you plan on recording PC screen activity? Do you think you’ll consider employing remote agents in the future? Most implementation issues can be avoided if the VoIP recording infrastructure is integrated into the overall network configuration at the initial design stage.

The First Generation Of VoIP Recording

Many organizations take a converged, hybrid approach to implementing VoIP — they’re usually not ready to switch over to VoIP telephony all at once. However, traditional recording methods often require a complete system change-out in order to migrate from recording in a traditional telephony environment to recording in a VoIP environment.

By Patrick Botz
Voice Print International



Although there are several first-generation VoIP recording methods, the most prevalent is host-based packet and media processing. Although effective to a certain degree, this method doesn’t offer the flexibility necessary for high-volume or full-time recording of VoIP interactions and often cannot meet the needs of the diverse global business marketplace.

Challenges Of Host-based Packet Media Processing

First-generation host-based packet media processing typically requires extensive server processing resources



and can impose a tremendous burden on network traffic. Most host-based offerings suffer from performance problems related to running the application and network interface functions on the same regular media processing server.

Perhaps one of the most noteworthy issues with host-based packet and media processing is the fact that it is limited in its ability to record encrypted calls. Beyond the internal telephone network, the IP signal must be encrypted for security purposes. This means that the packets can no longer be sniffed — unless the security of these interactions

is unimportant to the organization, which is highly unlikely. Also, host-based media packet processing has a point of failure when an IP soft phone is utilized by an off-site user.

The Next Generation Of VoIP Call Recording Solutions

Inevitably, the rigidity and numerous challenges associated with first-generation VoIP recording systems gave rise to the emergence of second-generation solutions. These advanced solutions are based upon network interface board technology designed specifically for voice recording. They

leverage open architecture and are platform-independent — integrating seamlessly into your existing and evolving infrastructure. They can sit securely behind your firewall and work in harmony with your network operations. Other capabilities of advanced solutions are as follows:

Simple migration path and minimal network impact. One of the greatest advantages of second-generation solutions is simple migration to emerging VoIP technologies. Complete system change-outs are no longer necessary to migrate from recording in a traditional telephony environment to recording in

a VoIP environment. All that's required is a change-over of the voice interface boards in the server. They reliably record audio from most traditional digital and analog and new VoIP PBXs/ACDs in the same server — preserving your initial investment. Also, second-generation solutions have very little impact on network resources — another major benefit. You do not need to forklift your network control data or upgrade your network just to reliably record VoIP interactions.

Single, feature-rich software application interface. Unlike many traditional offerings, organizations can now use one application to record and access their digital and analog interactions as well as their VoIP interactions. Many first-generation VoIP recording systems were developed as completely new, separate applications — often compromising and

limiting the functionality of the application. Second-generation solutions offer the same rich set of search, playback and reporting capabilities that organizations have become accustomed to for many years.

Industry-standard GSM file formats. Another great development is the ability of second-generation VoIP solutions to capture all audio in standard GSM file format. These solutions perform transcoding on-the-fly, normalizing and compressing it all into an industry-standard, non-proprietary GSM file format, regardless of disparate audio sources. This allows for simple, centralized storage and playback using any standard media player.

Advanced security. Since second-generation VoIP recording solutions have the ability to process only voice packets up front, you do not need to worry

about confidential IP data packets being transferred to the call recording application.

Self-maintaining solutions.

Based on state-of-the-art digital signal processor (DSP) technology, second-generation solutions are self-maintaining and provide for all network interface, packet filtering, media processing and recording functions. There is no need to constantly adjust network compression rates, rely on customer-provided routers and additional hardware, or increase the capacity of your current PBX to reliably capture calls. They

Complete system change-outs are no longer necessary to migrate from recording in a traditional telephony environment to recording in a VoIP environment.

ensure real-time response and quality of service on every channel recorded by greatly reducing the server processing resources (CPU) required by most host-based offerings.


True video screen recording. Second-generation solutions have also made true video-quality screen recording in a VoIP environment a reality, without compromising the quality of the video recording or affecting network performance. Unlike older technologies that constantly stream data over the network, file transfer of screen recordings originally captured at local PC workstations can be either continuous upon conclusion of every recording session or done via scheduled bursts after hours, when the network is less busy.

Do Your Homework

As you move through the normal cycle of replacing your PBX system, you will probably view VoIP as a logical choice for achieving increased productivity from converged messaging. When that time comes, be sure to do your homework. Finding the right solution — or the wrong one — will have a major impact on your organization, both now and for years to come. **CIS**

Patrick Botz serves as global director of marketing for Voice Print International (<http://www.voiceprintonline.com>), (news - alert) a provider of interaction recording and workforce optimization solutions for contact centers. As a CRM practitioner, Botz focuses on the mission-critical aspects of capturing real-time customer intelligence and optimizing workforce performance in real time. He may be contacted at pbotz@voiceprintonline.com.

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Quality Monitoring And Today's Technology

Quality monitoring has come a long way in the last few years. When it first came to the forefront, effectively recording calls and basic scoring of agents was proclaimed a godsend. Today, contact centers are achieving much more.

Contact centers still rely on evaluating agents, but today's solutions have raised the bar and provide world-class quality. New technologies, including analytics tools, sophisticated integration, keyword searches and user-friendly access, reinforce quality monitoring solutions. They also provide a superior return on investment and provide contact centers with state-of-the-art tools to hone their performance.

Quality monitoring has been integrated into the business's enterprisewide infrastructure and reinforced with customer feedback. It is now more affordable because of its modular architecture, and it works with a wide variety of business phone systems and in prominent network environments such as Cisco and Siemens.

This article will survey the development of quality monitoring and discuss recent innovations in the field. It will also discuss how quality monitoring has been influenced by other, seemingly unrelated, technological developments.

Fundamentals Of Quality Monitoring

Quality monitoring was engineered to help call center agents learn from their own customer interactions. Supervisors recorded calls to explain basic concepts and point out the best way to handle different situations.

Agents learned from one another, as well. Excerpted segments of real conver-

sations have been used in general training sessions to increase productivity and product knowledge, and to teach diplomatic ways to handle difficult customers.

Quality monitoring became formalized through the use of standard templates to compare agent skills and ensure accurate evaluations. Categories were established, and software was developed for the burgeoning industry.

Quality monitoring hardware soon outgrew the first-generation solutions and became far more than a recording machine. User-friendly interfaces and browser-based solutions allowed easy configuration, quick access from any computer in the world, and playback over LAN/WAN connections. Calls were stored online or archived to removable media such as DVD or AIT.

Systems were used to monitor thousands of channels simultaneously, and multiple units connected to one server for businesses with branch offices.

In addition to the recording unit, quality monitoring software developed new capabilities, as well. Flexible templates were developed for evaluation and scoring, and the need for costly CTI integration was avoided through a digital interface with the company's phone

system. Compatibility with standard reporting engines and easy-to-use evaluation wizards minimized the need for lengthy training of supervisors and other quality assurance personnel.

Quality monitoring has been used by many different industries including contact centers, financial institutions, public-safety organizations and government agencies. It has been employed in a selective manner for agent training and in bulk for regulatory compliance and protection from liability. Record-on-demand is also widely available for emergencies, threat calls and other special situations.

Quality Monitoring Innovations

Recent quality monitoring innovations have created an entirely new product. The resulting systems are more powerful, save on setup and training costs and improve customer service.

For example, solutions now record all types of agent/customer interactions including voice, fax, e-mail and desktop activity. "Smart" technology allows supervisors to start or stop recording based on any pre-defined event on the agent's desktop, including the appearance of an error message or the selection of any radio button or item from a pull-down menu.

Smart quality monitoring solutions are inexpensively installed through a user-friendly configuration wizard, with

By Tony Procops and Mark Williams
ASC



no knowledge of CTI or data interfaces required. The savings on professional setup fees are significant.

Another recent development, feedback modules, now allows instant evaluation of the agent's performance by the customer, a crucial capability since unhappy customers are less likely to defect if they have the opportunity to complain. These post-call surveys may also be used to validate or dispute a supervisor's evaluation.

A third innovation, real-time communication, facilitates interaction between agents and their supervisors. During difficult calls, agents may contact their supervisors for assistance, and the supervisors may respond privately via a chat session or by taking remote control of the agent's desktop. This proactive

approach provides not only "live, on-the-job" training for agents but, more important, can convert an unhappy customer into a loyal one.

Finally, storage capabilities have also been updated. Some solutions can preserve thousands of hours of interactions online, reducing the need for archiving equipment. Recent breakthroughs in data compression have increased this figure five-fold over the last 12 months. For those who wish to archive, often for redundancy, storage is also available on low-cost media such as DVD or AIT, or calls may be stored directly on existing network storage devices.

New Business Technology

Despite the rapid development of quality monitoring solutions, the wave

of the future integrates these systems with the latest business technology. The combined solution provides a synergistic tool with major implications for overall productivity and bottom-line results.

For example, the growth of data mining and similar analytics tools allows businesses to wade through large volumes of material to retrieve information on any specific topic, especially those easily defined by a keyword or phrase.

Quality monitoring solutions have adapted this keyword spotting capability to audio recording. A speech-processing engine transcribes audio signals into phonetic patterns and stores them in a binary index file. Then, the user can search for a particular pattern within this index file.

Keyword spotting affects the quality monitoring process because it is able to recognize pauses and collisions (two people speaking at the same time) in the conversation. By programming the system to eliminate "normal" collisions, such as reassurances or agreements, e.g., "yes, uh-huh," the solution may be used to spot either lack of knowledge (pauses) or contention (collisions).

Second, the development of modular flexibility, scalar systems and the ability to eliminate or reduce technology obsolescence represent major cost-saving innovations in many new business products. Quality monitoring solutions have joined the bandwagon.

Program modules help businesses avoid redundancy and save money because a company need not buy an entire solution, just the part, or the module, it really needs. The latest communications recorders offer an à-la-carte feature selection. Firms can meet their current requirements, then add more functionality as it is required. For example, scalable channel arrays allow businesses to record anywhere between four and thousands of channels simultaneously.

Quality monitoring software also utilizes a modular architecture and may be divided between functional areas such as agents, templates, record planning, sessions, evaluations and reports.

A third new business technology involves the development of voice over IP. As more contact centers switch to IP phone systems, quality monitoring is continuing to adapt. For IP-enabled firms using bulk recording for regulatory compliance or protection from liability, this adaptation has been crucial — the company may need only one call out of thousands, and if it came in through voice over IP, it must be preserved.

The latest solutions categorize **VoIP (define - news - alert)** calls by selected parameters such as date, start/end time, call duration, channel or IP address; and then store them on the organization's server. They work with leading VoIP

solutions, integrate with different network environments, and support enterprise-wide applications. For contact centers switching to VoIP in stages, quality-monitoring firms provide special products for hybrid environments.

Other seemingly non-related technological developments also improve the effectiveness of quality monitoring solutions. Cost-effective licensing solutions and free-seating environments (where agents are identified through their Microsoft login I.D.) have facilitated the use of many high-tech systems. Powerful browser-based products have increased enterprise flexibility, and the trend of technological convergence has led to increased compatibility among disparate solutions.

Convergence and compatibility have affected quality monitoring solutions, as well. For example, recording units now work with both Windows and Linux operating systems. Linux provides a very stable environment for mission-critical applications; includes all UNIX standard tools; offers excellent networking capability and an advanced graphical interface built into the operating system; and most important, uses an open-source architecture that is continually being improved.

In addition, VoIP recording solutions are now compatible with SIP, an Internet protocol and emerging industry standard allowing the use of IP telephony switches without proprietary support. Thus, the recording solution may now be accessed from any location with the same call set-up, handling and forwarding functions. In fact, SIP makes telephony similar to any other Web application and may be used to build converged voice and multimedia services from formerly incompatible components.

Information is the key to any organization's success. Quality analysis is no longer independent from other key technologies driving a successful business. It must be supported with other analytics tools to create a more powerful solution.

Unhappy customers are less likely to defect if they have the opportunity to complain.

Business developments such as data mining, modular flexibility and the growth of VoIP have now been integrated into the latest quality monitoring solutions. Trends such as technological convergence and browser-based configuration have led to more compatible and user-friendly products.

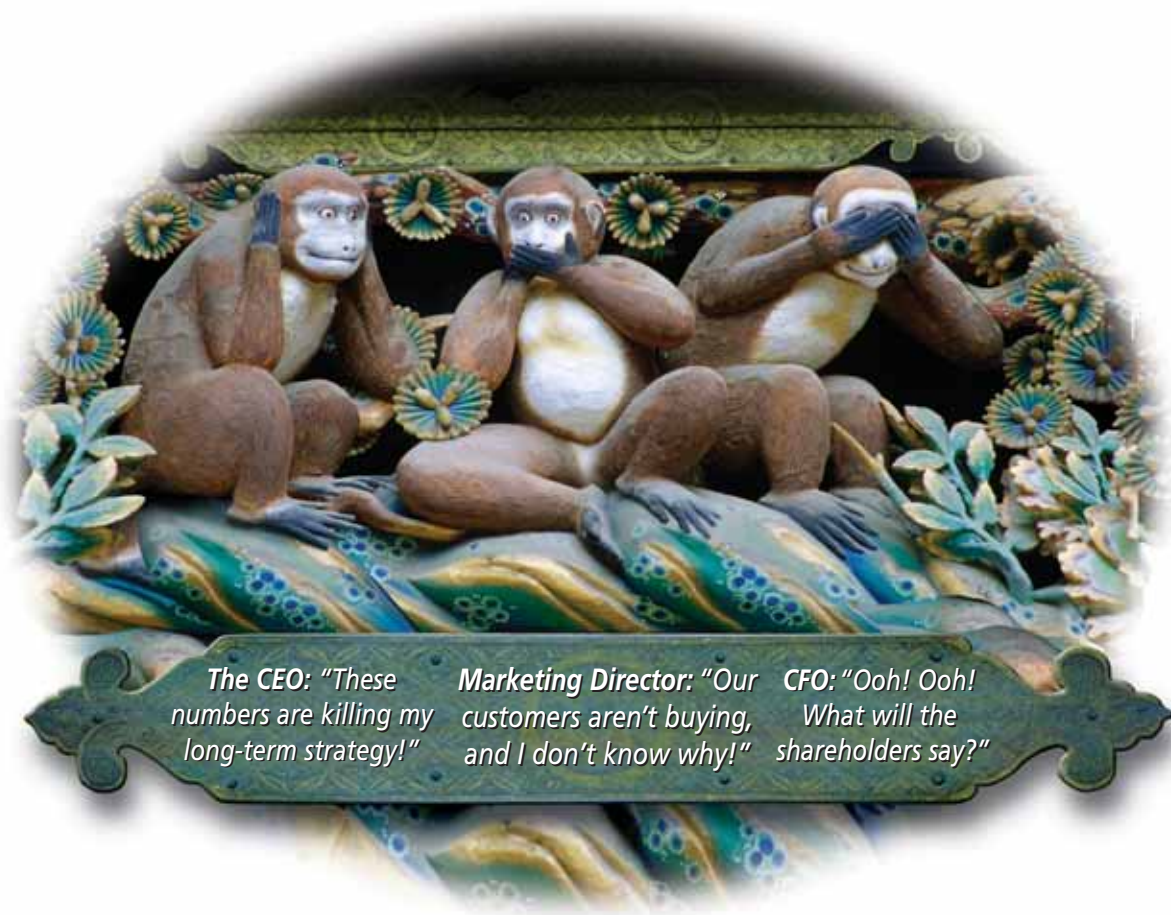
Quality monitoring has become more important than ever. In an increasingly competitive economy, firms must use a customer-centric approach to win as much business as possible. Teaching this approach is the ultimate aim of quality monitoring and the main reason its importance and capabilities will continue to grow. **CIS**

*Tony Procop, senior vice president and general manager of ASC, established its North American subsidiary in 1998 and oversees all its operations. Mark Williams, Regional Vice President, has managed the Western Region for ASC and has been an instrumental member of the ASC Contact Center Solutions Team. **ASC (news - alert)** (<http://www.asc telecom.com>) is a global provider of integrated communications recording and quality monitoring solutions for contact centers, financial institutions and public safety and government organizations. With more than 40 years of experience in the communications industry, ASC has over 20,000 installations in more than 60 countries.*

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Taking Steps To Ensure CRM Data Security

The data contained within a CRM application is often a company's most critical asset, yet because of the pivotal role this information plays in day-to-day business activities, it is also often the most vulnerable to security breaches and disruptions.

What's more, ignoring or under-estimating vulnerabilities can be costly; a recent study by The Ponemon Institute found that a data breach can carry a staggering \$14 million price tag when both tangible and intangible costs are factored in.

That study, which was commissioned by PGP Corporation, examined costs incurred by 14 companies in 11 industry sectors that had breaches affecting between 1,500 to 900,000 consumer records — a total of 1.4 million compromised records. In general, the largest breaches occurred in financial services, data integration and retail businesses, while the smallest were in healthcare and higher education.

Most notably, the survey found that:

- Total costs to recover from a breach averaged \$14 million per company, or \$140 per lost customer record;
- Direct costs for incremental, out-of-pocket, unbudgeted spending averaged \$5 million per company, or \$50 per lost customer for outside legal counsel, mail notification letters, calls to individual customers, increased call center costs and discounted product offers;
- Indirect costs for lost employee productivity averaged \$1.5 million per company, or \$15 per customer record; and

- Opportunity costs covering loss of existing customers and increased difficulty in recruiting new customers averaged \$7.5 million per company, or \$75 per lost customer record. Overall customer loss averaged 2.6 percent of all customers and ranged as high as 11 percent.

If the dollar amounts aren't convincing enough, consider the impact a data breach can have on a company's customer base: A related survey also conducted by Ponemon found that, upon receiving notification that their data had been lost, 20 percent of respondents said they had terminated their relationship with the company, and 40 percent were considering doing so.

Clearly, securing the data within their CRM systems should be high on any company's priority list. The best defense against breaches is a carefully structured set of policies and procedures that apply appropriate security measures based on the value of the data contained within the CRM application as well as on the potential risks to those data from internal and external sources.

Creating those policies and procedures is a three-step process that any organization using CRM systems should

follow to ensure their data are secure, and their bank accounts and customer base aren't placed in jeopardy.

Step One: Know Your Enemies

The first step is to understand the types of threats and evaluate the potential for danger; the truth may surprise you.

With so much attention paid to malicious attacks by hackers, worms and viruses, it's a common misconception that outside forces pose the greatest danger to a company's data. The reality, however, is that internal elements are far more dangerous when it comes to data security than anything on the outside, including natural disasters.

In fact, 59 percent of data loss is caused by hardware or system malfunctions such as electrical failure, media crashes or controller failure, and 26 percent is caused by human error such as accidental deletion or drive formatting. Software malfunctions account for another nine percent of data loss.

Outside forces, on the other hand, don't even come close: only four percent of data loss is caused by viruses, and just two percent is caused by natural disasters such as fires, floods or brown-outs.

Also important to the security plan is to consider both the physical and logical security of your data. Physical security addresses the ease with which someone can tamper with or take down

By Ken Seitz
E Solutions Corporation



a CRM system through physical means, while logical security is the ease with which unauthorized access can be acquired.

Of particular importance is how data contained within a CRM application are accessed, such as via the Internet, corporate intranet, VPN ([define - news - alert](#)) or a secure network connection. The mode of access makes a huge difference in a system's risk profile; the more public the access points (i.e., Internet or intranet versus a dedicated VPN tunnel), the higher the risk level.

Step Two: Tolerance For Loss

The second step in developing comprehensive policies and procedures to secure CRM data is to determine exactly what level of tolerance the organization

has for any loss of access to the CRM application and data should security be breached.

This information is used to establish the organization's recovery time and recovery point objectives:

- Recovery time objective (RTO) refers to the period of time within which the applications must be recovered after a breach before the loss is considered significant. In one study, 22 percent of enterprise-level companies and 20 percent of mid-tier companies reported that downtime of less than one hour would result in significant revenue loss or other adverse business impact. In a second study, 46 percent reported that the loss of data for 72 hours would threaten the survival of their business.

- Recovery point objective (RPO) is the point in time at which systems and data must be recovered after an outage. In other words, how much data can a company lose and still be able to survive? If RPO is six hours, the company must be able to restore systems back to the state they were in as of six hours prior to the breach.


A company's RTO and RPO ultimately dictate the technology used for both security and data backup. Companies with long RPOs can opt for more traditional scheduled backups that take place once or twice a day.

Companies with short RPOs, however, are best-served by the near real-time backups offered by "snapshot" systems. For example, remote backup

services have very short backup windows because they transfer only bit-level differences between previous and current versions of files, which allows for multiple backups throughout the business day.

Another option for companies with very short RPOs is one of the emerging continuous data protection (CDP) solutions which protect data on a transactional basis. Using e-mail as an example, a CDP solution for Microsoft


Monitoring policies and systems should be implemented to detect when critical services or data are changed or made unavailable, or when there are anomalies in usage such as high volume on a Sunday afternoon.



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Exchange makes it possible to restore any message that ever flows through the system, providing continuous protection against server crashes, user deletes or any other imaginable failure. While CDP is currently considered the high-end of backups, the growing push to shorten RPOs by companies of all sizes is likely to make it something every company strives for in the near future.

When selecting the actual backup medium and storage of that medium, a company's RTO must be considered; the shorter the RTO, the more accessible the primary backup medium should be. (Duplicate backups should always be stored off-site for maximum protection.)

Disk-based restoration systems provide a far shorter recovery window than tape media, as do remote backup services. If the primary backup is also kept off-site, which is often the case with tape, restoration time is even longer.

In the case of remote backups, restores can take place through a Web interface to any system without an agent installation, making it considerably less time-intensive than restorations requiring the retrieval of off-site media, which must be loaded onto a backup system after an agent is installed.

Step Three: Bring It All Home

The third and final step is to use the information gathered in steps one and two to develop and implement a comprehensive set of security policies and

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procedures, which will ultimately drive the specifics on how and what technology is used.

Policies and procedures should take a number of things into consideration, starting with access. Users should be restricted to only those areas that pertain to their work functions, and firewalls need to be correctly installed and configured to prevent unauthorized access. In fact, it's a good idea to have a separate policy dealing with prevention issues, such as what systems are in place to prevent unauthorized access to CRM data.

Playing into access is auditing; a policy should be established that clearly defines how an organization will determine who has access to what information, and to identify when changes have been made to the system.

Complementing the auditing policy should be a procedure outlining how alerts are handled. Who should be notified when an attempted breach occurs or when data are lost, and what steps should be taken as a result?

Which leads us to monitoring: Whether it's done internally with software or outsourced, monitoring policies and systems should be implemented to detect when critical services or data are changed or made unavailable, or when there are anomalies in usage such as high volume on a Sunday afternoon when there is limited or no staff on the clock. While it may turn out not to be security related, it's important to know when any change in routine has taken place so it can be checked out.

Finally, even the most ironclad policies and procedures in the world won't help if there's no way to recover data. Which brings us to data backups: It's critical to run regular backups that will meet the company's RTO and RPO, which, as noted above, play a key role in determining the type and frequency of backups and storage. Further, a policy should be in place that, in addition to the frequency of backups, dictates the "chain of command" for data recovery

or restoration in the event of a loss or breach.

Ready And Willing, How About Able?

So, you've followed the steps; you've identified your threats, established your RTO and RPO and developed your security policies and procedures. Now it's time for the \$14 million question: Can you keep your CRM data secure with your existing resources?

Just as vulnerabilities can be underestimated, so can a company's ability to effectively manage data security on its own. The risks are too high to ignore, so it's important to fully evaluate internal capabilities to ensure they are adequate for the task. Ask, and honestly answer, the hard questions, including:

- Do you have the technical expertise and sufficient manpower to implement and manage a security infrastructure that adequately protects your CRM data?
- Do you have the technology and expertise to meet RTO and RPO?
- Do you have an adequate budget to manage and maintain the currency of your security and attain RTO and RPO?

If you don't have the manpower, experience or budget to ensure data security, outsourcing is a viable option. Working with a qualified outsourcing partner provides not only expert implementation of security measures, but also ongoing updates and round-the-clock monitoring and management.

An outsourcing partner can also conduct overall and front-end data loss risk assessments and assist in the development and implementation of a sound data-classification policy and data handling procedures, as well as conduct ongoing audits to ensure continuous compliance.

However, it's important to hold any outsourcing provider to the same \$14 million standard to which internal resources are held, which means conducting a comprehensive evaluation of technical expertise and experience. The key to any evaluation is the vendor's:

Only four percent of data loss is caused by viruses, and just two percent is caused by natural disasters such as fires, floods or brown-outs.

- Financial security and stability;
- Staffing levels and credentials;
- Expertise with the CRM application they'll be managing; and
- The security systems employed by the vendor to prevent unauthorized access and detect intrusions.

Finally, whether security is handled internally or outsourced, establishing truly effective policies and procedures involves more than just developing the documents; it is also critical to thoroughly test them, as well as audit and update them on a regular basis. Doing so will ensure your CRM data are receiving the highest level of protection warranted by the impact the information's loss could have on your business. **CIS**

Ken Seitz is CIO of E Solutions Corporation (<http://www.esnet.com>), (news - alert) where he is responsible for overseeing availability, performance and security of E Solutions' network and customers, which range from global Fortune 100 firms to mid-sized and small businesses. Seitz also manages a team of IT experts who provide immediate support of internal and external needs, as well as data center facility management, service design and project management. He can be reached at kseitz@esnet.com or (813) 301-2600.

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Nuance Introduces Nuance Mobile

Nuance Corp. ([news](#) - [alert](#)) recently announced a new solution in its Nuance Mobile, an approach to mobile communications designed to unlock the power of the phone to fundamentally change the way consumers operate in the mobile environment. Nuance Mobile was created to be an ideal solution for device manufacturers, mobile operators, application publishers and content providers to enhance the consumer experience. Nuance Mobile enables seamless user interaction with mobile search and communications applications so consumers can increase the utility of their mobile devices, while handset vendors and service providers can tap into new sources of revenue. The mobile initiative includes technology, applications, services, marketing support and a partner program that extends Nuance's own offerings.

Existing partners include **Promptu**, a provider of voice-enabled search and navigation solutions serving the mobile, cable and other emerging industries; **V-Enable**, a provider of mobile speech search solutions; and **VoiceBox Technologies**, a provider of conversational voice search and content navigation solutions.

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Microsoft Debuts First Set Of Features From Microsoft Speech Server 2007

Microsoft Corp. ([news](#) - [alert](#)) has disclosed the road map and first set of features of its upcoming release of Microsoft Speech Server 2007.

Beginning in May, beta testers will have the opportunity to preview and provide feedback on Speech Server 2007, which is planned for release in late 2006. Speech Server 2007 is Microsoft's next-generation speech and telephony platform designed to help contact centers and businesses meet the challenge of reducing costs while improving automated customer service over the telephone. Speech Server 2007 will provide full support for Speech Application Language Tags (SALT) and Voice Extensible Markup Language (VoiceXML), which will enable customers to choose the development standard that will work best in their environment.

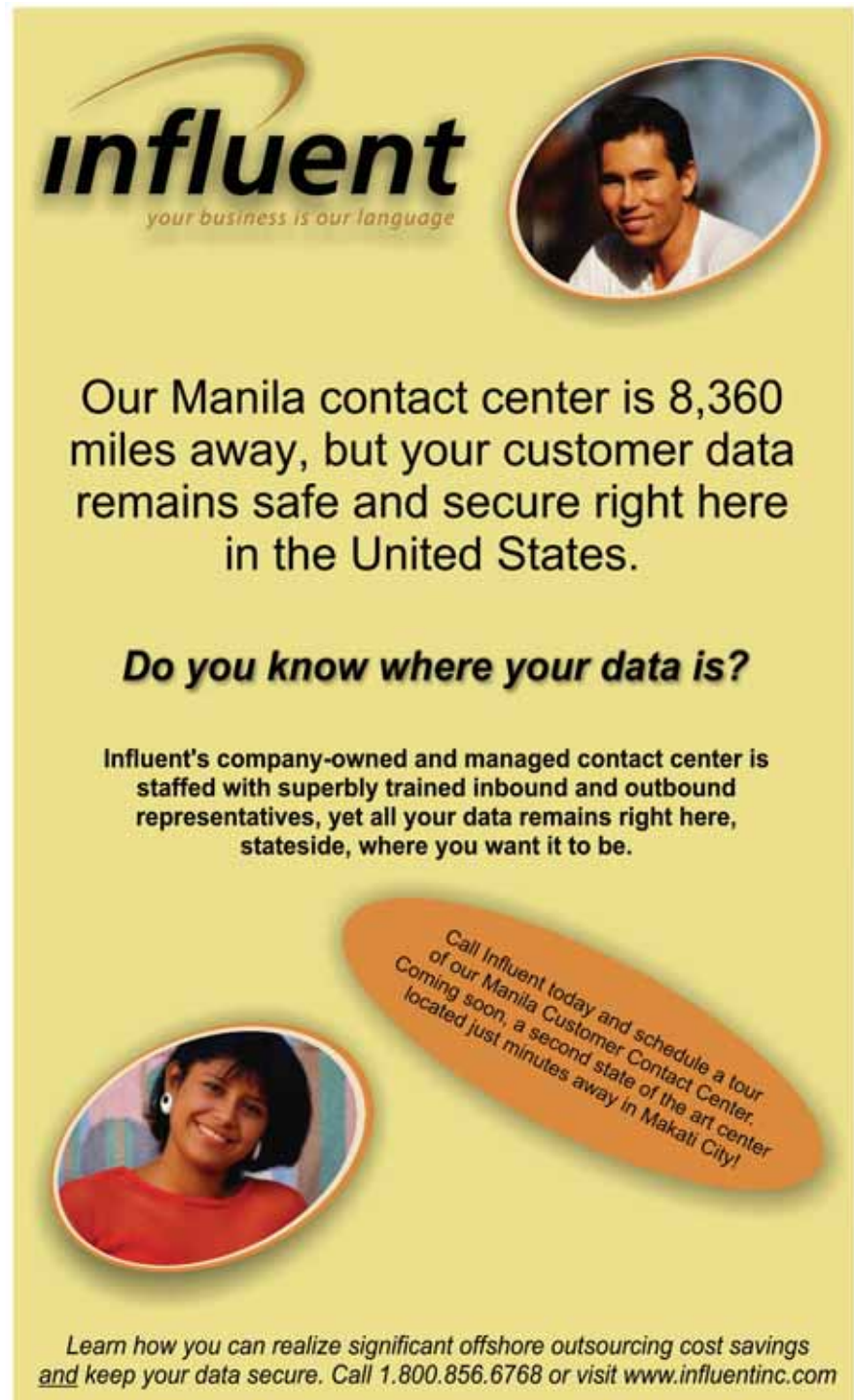
Speech Server 2007 can easily plug into existing telephony infrastructures to deliver more cost-effective and integrated customer-service operations. Contact center and business managers will also have access to new monitoring tools that can identify performance issues and opportunities to help ensure that the system is efficiently and accurately addressing caller inquiries. Broadening voice response application development options for companies, Speech Server 2007 includes full support for SALT and VoiceXML. With the newly included VoiceXML support, customers will be able to write World Wide Web Consortium's VoiceXML 2.1-compliant applications within Microsoft Visual Studio 2005 and deploy those applications, or existing VoiceXML 2.1-compliant applications, on Speech Server 2007. Microsoft has also joined the VoiceXML Forum (<http://www.voicexml.org>) at the Promoter level.

Speech Server 2007 also introduces a Microsoft .NET Framework-based application programming interface (API) for low-level access to core Speech Server functionalities. Companies can build applications on the Speech Server API using widely known programming languages such as JavaScript and C#, reducing time and development cost. <http://www.microsoft.com/speech>

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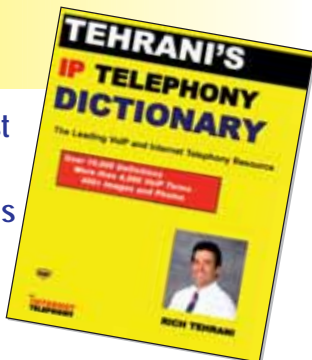
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IDENTIFICATION STATEMENT

CUSTOMER INTER@CTION Solutions® magazine (ISSN: 1533-3078) is published monthly by Technology Marketing Corporation, One Technology Plaza, Norwalk, CT 06854 U.S.A. Periodicals postage paid at Norwalk, Connecticut and additional mailing offices. Postmaster: Send address changes to: **CUSTOMER INTER@CTION Solutions®**, Technology Marketing Corporation, One Technology Plaza, Norwalk, CT 06854 U.S.A.

To subscribe, call toll-free: 800-243-6002. If busy, call 203-852-6800 or write to the circulation director at srusso@tmcnet.com. Subscription rates (published monthly): Free for qualified subscribers in the U.S.A. only. For non-qualified U.S.A. subscribers, \$49. All Canadian subscribers, \$49. All Foreign (air mail), \$85. All orders are payable in advance in U.S. dollars drawn against a U.S. bank. Connecticut residents add applicable sales tax.



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

Requesting Asylum From Bad Telecom Customer Service

I'm a [Vonage \(news - alert\)](#) customer, starting today. That's not shocking, you might think. But it's the long, strange trip to Vonage that contains the story. Let's call this "A Lesson About Bad Customer Service," and it starts with SBC.

I moved into a new house in December of 2004. One month before that, I saw the house for the first time. The sellers were present when I looked at the house. They showed me the house's quirks: a spot of strange hybrid plumbing, the secret to keeping squirrels off the birdfeeder (the secret is that there is no way to keep squirrels off the birdfeeder) and the places where ants come in during the spring.

Fast-forward one month. I was the proud owner of the house. What I didn't have was phone service. After about nine exchanges with SBC and their claims to have sent a technician to investigate, they informed me the problem was in the house (which I doubt, since the former owners' phone worked just peachy). I could get it fixed, they said, two weeks from Wednesday, and I would have to pay the technician's hourly rate.

My second-to-last communication with SBC was some variation of, "Please take your overly expensive phone service that I barely use anyway and insert it into the location upon your person which undoubtedly contains your brain."

Not long after, I received a call from a "customer defection specialist" at SBC. "But why are you leaving us?" she asked. I explained the sordid situation to her. "Oh, no," she said. "I could get a technician out there tomorrow, and you wouldn't have to pay for it." (In other words, "Oh, sorry! We mistook you for the sort of customer that will lay down and let us run over you with bad service while we take your money. Now that we've found out you're not, we'd really like to give you some good customer service, starting now.")

"Too late," said I. "I'm going VoIP. I do not need your silly copper wires."

Since my cable provider does not offer the third leg of triple play (phone service) in my area, I was forced to go elsewhere. For reasons that are unclear to me now, I chose AT&T CallVantage. I believe my decision had something to do with AT&T's claims of better E-911 service than Vonage.

I should have taken warning from my account set-up process. I was told by the call center agent that she needed my credit card or checking account information for automatic bill payment every month. I told her I didn't want that...I was glad to pay the bill via their Web site, but I wanted to determine when it was paid...not them. "No, sorry," she said. "We don't do it that way." I said, "You mean, unless you can automatically deduct the charges from my account, I'm not 'allowed' to have your service?" She prevaricated more than a White House press secretary, and because I'm a Taurus known for sheer doggedness, I finally got her to admit that this was true. If I had no credit card (some people don't) and didn't want to give them my checking account information, they wouldn't "take" me as a customer. Right.

After installation, I was quite happy for a while, though I was ever aware that I was paying \$5 more per month than I would have for Vonage. "It's because of the better E-911," I told myself. "It's worth it."

Then I got my first message. How exciting! Log on and get your phone messages over the Internet. Until I tried it. AT&T's CallVantage service uses a bewildering method of message delivery that usually resulted in me being presented with copious offers for hip-hop downloads, but seldom resulted in me actually listening to my messages.

I called them. "How the *&@ do I get my messages?" I was given a scripted response that told me exactly nothing. I mentioned the "V" word (Vonage) and was offered four months of reduced-rate service. (Touchy about that \$5 premium, are we?) It was at this time I noticed that Vonage was offering a "low usage" package for \$15 per month. Since I barely use my phone anyway, this was appealing.

Months passed. The messaging situation didn't improve. "Look," I said. "I'm a technology editor and I can't figure your system out. Shouldn't that tell you something?" After multiple e-mails, which were becoming increasingly colorful on my end, I was told to "call the help desk." I said, incredulously, "You want me to place a help desk call, which will cost you about \$50, to inquire how a standard features of your service works? Are you nuts? Why can't you just send me step-by-step instructions or an FAQ list? I cannot be the only person calling about your basic operational procedures. Do you send them all to the help desk?"

I was told someone "would get back to me" within two days. I'm still waiting.

No, scratch that...I'm not waiting anymore. This time, I didn't even bother to tell them to insert their service next to their brains...I just defected to Vonage, and thanks to that telephone number portability legislation that the telecoms lobbied so hard against, I was able to take my phone number with me.

On my last e-mail to AT&T, I wrote, in large letters at the bottom, "YES, THIS IS A CUSTOMER DEFECTION WARNING E-MAIL, IN CASE YOU HADN'T SPOTTED THAT YET. WHAT YOU DO NEXT DETERMINES WHETHER I REMAIN A CUSTOMER."

Never heard back from them. Needless to say, I'm no longer a customer. Based on my history, I have low expectations from Vonage, but hope to be pleasantly surprised. But even if their customer service is as hideous as that of my previous telecom carriers, at least I'm paying half as much for the service.

Customer abuse doesn't gall quite so much when it's being offered at a discount.

The author may be contacted at tschelmetic@tmcnet.com.



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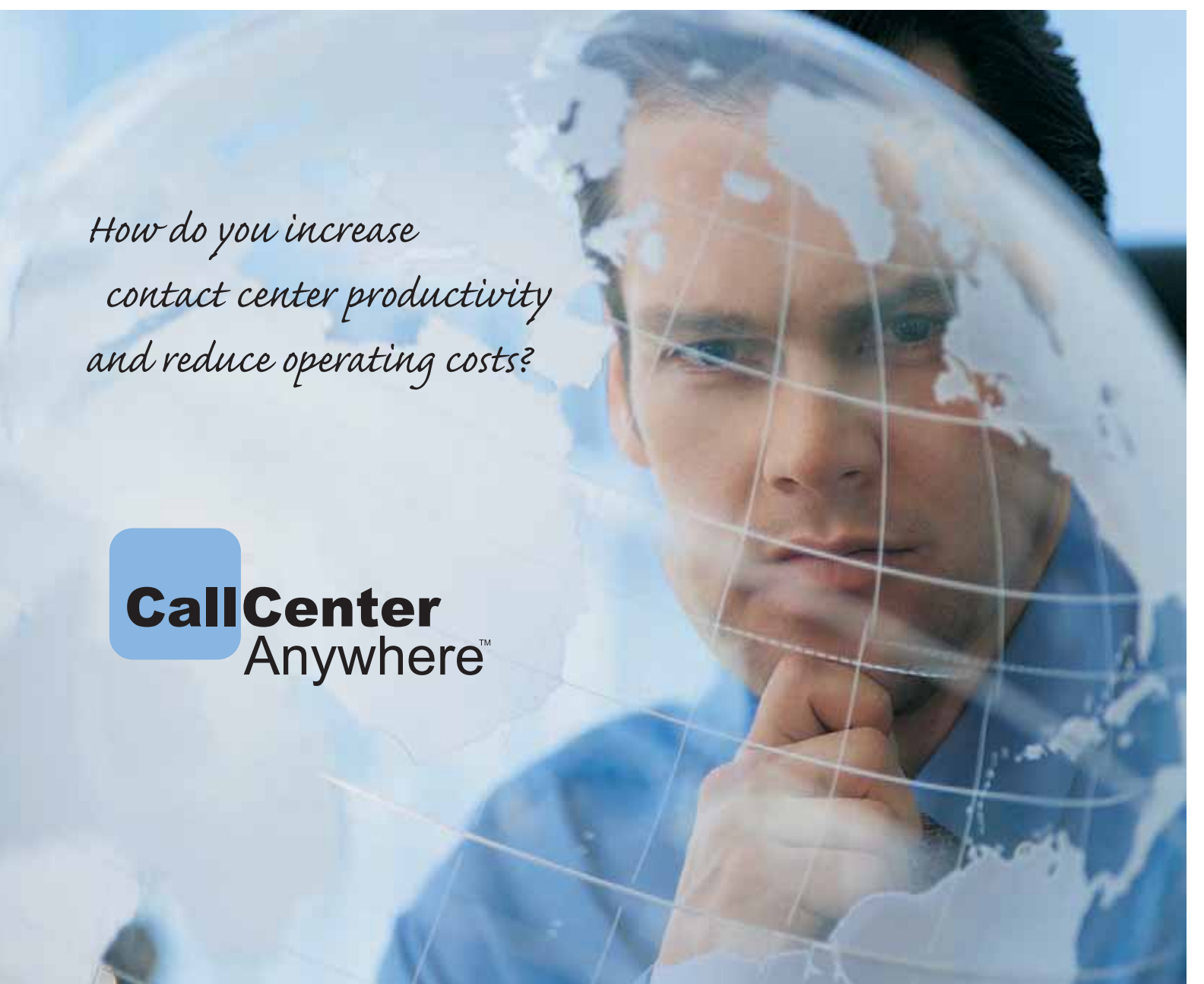
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