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# Headset

Technology Review

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## Also In This Issue:

- Contact Centers and Green Technology
- 2007 Speech Technology Excellence Awards
- Special Corporate Profiles Section
- CRM Services and Solutions Round-Up
- Four Reasons to Choose Ontario for Your Call Center

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

# Contact Centers and Green Technology

Contact/CRM Centers have always been great users of “green technology” and environmentally friendly operations.

## Definition of Green Technology:

According to Wikipedia, environmental technology or green technology, is “the application of the environmental sciences to conserve the natural environment and resources, by curbing the negative impacts of human involvement.”

## TMC - A Pioneer in Green Technology Publishing

Thirty-five years ago, TMC launched the world's first magazines on energy efficient, non-polluting technologies.

Yes, we are proud to be industry pioneers in contact centers, telemarketing, VoIP and CRM. We also pioneered the first five magazines on energy efficient, non-polluting chemical technologies, which are today, the heart of environmental protection technologies also known as “green technology.”

Contact/CRM centers have always been great users of green technology and environmentally friendly technologies. Ever since 1982, when this publication laid the foundation for what is now a trillion dollar worldwide call center industry, it has been well-known that call centers contribute to the energy efficiency and protection of the environment.

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**Thirty-five years ago, TMC launched the world's first magazines on energy efficient, non-polluting technologies.**

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customer interaction, contact/CRM center activity working in the following areas, among others:

**Home Agent/Remote Agents:** This is one of the fastest growing segments of the contact center industry today. They eliminate the necessity of driving

to work every day, wasting gasoline and polluting the atmosphere while wasting time traveling to and from work. As a result, home agents are becoming more and more an integral part of the green technology/environmental technology scene, by contributing significantly to environmental protection, energy conservation and pollution controls. The estimated number of home agents in the U.S. is between 400,000 and 500,000. It should be pointed out that the call center agent position lends itself to the home-based model.

**Video Conferencing:** Video conferencing, as a significant part of the teleconferencing sector, is also a significant contributor to the environmental/green technology by eliminating the necessity of hundreds of thousands of people traveling globally, which is not only costly, but also contributes, once again, to the wasting of energy while adding to the atmospheric pollution.

**Customer Service, Customer Care and Customer Retention Services:** These also play a tremendous role in the conservation of energy and reduction in the pollution of the atmosphere by simply contacting or conducting two-way conference calls with customers in order to solve customer service related problems while eliminating the travel to each customer worldwide. Can you imagine how much money and gasoline would have been wasted not to mention major pollution introduced to the atmosphere?

**Banking and Financial Services:** Two other areas where contact centers are contributing significantly to green technology and environmental protection are the areas of banking and financial services. These industries are major users of contact centers to handle a variety of customer care, customer service and customer satisfaction matters, not to mention cross-selling of credit cards, debit cards, etc.

**Insurance:** Another sector which is heavily involved in the use of call centers for sales, claim services and customer care is the insurance industry. Once again, hundreds of thousands of people are engaged in this sector while eliminating significant energy waste as well as considerable pollution to the atmosphere.

**Telecommunications:** The telecommunications industry is yet another major user of call centers to handle a variety of applications while conducting business selling sales support, database building, etc. in a most energy efficient non-polluting manner.

**When you consider the amount of energy conservation and pollution elimination which the contact center industry has contributed toward green technology and environmental protection, you find that few, if any industries have contributed as much, in the last 26 years to the global economy and to environmental protection.**

**Collections:** The credit and collection industry has always been one of the vitally important parts of every business. It also utilizes hundreds of thousands of contact center personnel. Incidentally,

this sector, along with the fund-raising sector, is exempt from the do not call regulation.

**Fundraising:** This is an extremely vibrant and dynamic sector of out-bound, also uses hundreds of thousands of call center personnel and agents to raise funds as charitable donations, for building hospitals, libraries schools, etc.

**Sales Support:** The sales support and sales service industry, which is one of the most vital segments of every business, also heavily uses hundreds of thousands of contact center personnel to build databases, qualify prospects and conduct assorted other sales support functions, so it, too, contributes to a healthier, greener environment.

When you consider the amount of energy conservation and pollution elimination which the contact center industry has contributed toward green technology and environmental protection, you find that few, if any industries have contributed as much, in the last 26 years to the global economy and to environmental protection.

### Teleworkers are the Champions of the Green Technology Movement

By reducing daily commuting distance, teleworkers can reduce their annual carbon emissions by as much as 36% from 16.9 tons to 10.1 tons, according to statistics derived from the personal carbon emissions calculator on <http://www.carboncrisis.net>. Applying this formula to the 15 million call center agents, you are talking about a reduction of more than 90 million tons of carbon emissions per year.

### Other Factors Contributing to the Rapid Growth of Green Technology

The following are excerpts from an article from the Washington Post, which explain how world leaders are also get-

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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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ting involved in Green Technology. The title of the article is, "Internet Visionaries Betting On Green Technology Boom, Vast Market Huge Profit Potential Beckon Investors:"

"Bill Gates, John Doerr and Steve Case believed in the Internet long before Wall Street did. Now, they're betting on the next great 'disruptive' technology: alternative fuels and other environmentally friendly products, but this time other investors aren't far behind."

"Last year, AOL LLC founder Case launched Revolution LLC, which has invested in companies such as car-sharing service Flexcar that promotes sustainable lifestyles. In November, Microsoft Inc. founder Gates committed \$84 million to a California company to finance the construction of five ethanol bio-refineries. And last month,

To learn more about applications of green technology, as well as cutting edge contact center technologies, please attend Green Technology World as well as Call Center 2.0, to be held September 11-12, 2007 at the Los Angeles Convention Center, Los Angeles, California. For more information, visit [www.greentechnologyworld.com](http://www.greentechnologyworld.com) or [www.tmcnet.com](http://www.tmcnet.com).

Doerr, the venture capitalist who invested early in Google Inc. and Amazon.com Inc., set up a \$100 million fund to invest in 'green technology.'

"To be sure, the investments don't make up a large proportion of their portfolios, and even with oil at \$70 a barrel, alternative energy sources are still at the margins of the market. Gates, one of the world's richest men, has committed far more toward developing low-cost

drugs for impoverished countries. And while Case has committed around \$500 million of his own money to Revolution, some of that is going to fund health care and spa investments. But just as two decades ago they saw the Internet as a way to make money and change the world, they now think green technology is poised to make a difference of its own."

"Greentech could be the largest economic opportunity of the 21st century," Doerr said in a February press release announcing that Kleiner Perkins Caufield & Byers, the investment fund that helped underwrite many prominent tech start-ups, would raise \$100 million for the green technology fund."

*As always, I welcome your comments. Please email them to me at [ntehrani@tmcnet.com](mailto:ntehrani@tmcnet.com).*



During my twenty years in the contact center and teleservices industry, I have learned two important lessons pertaining to client expectations. First and foremost, the client expects and deserves superior call quality and contact center performance on behalf of their customers. Secondly, the client deserves an honest, open and straightforward relationship with their vendor. In other words, a no-excuses environment.

I consider these two items to be the cornerstone of a strong client/vendor relationship. I am proud of the fact that our very experienced management staff shares and expresses this belief through their everyday client interactions. This fact is further substantiated by their ability to utilize their former client relationships as references.

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## TMCNET.COM ONLINE EXCLUSIVES



### Five9's Jim Dvorkin Discusses the Advantages of SaaS for the Contact Center

*Adoption of Software as a Service (SaaS) is increasing in the call center industry, as companies are discovering the advantages today's hosted solutions have over on-premise systems. TMC recently held an online interview with Five9's CTO, Jim Dvorkin, who explained the advantages today's SaaS solutions bring businesses.*  
<http://www.tmcnet.com/857.1>

### Is Now the Time to Go With a Workforce Management Solution?

*Today's workforce management software does much more than schedule the agents' shifts. These systems can actually help companies predict the trends which will result in a sudden increase or decrease in traffic — and thus can help companies plan for the unexpected. In this sense, today's workforce management software is used more like a forecasting tool, rather than a basic spread-sheet scheduling system.* <http://www.tmcnet.com/858.1>

### Contactual Launches Authorized Reseller Program

*Contactual has launched a new reseller program to help it attract new domestic and international partners who in turn will be able to quickly and easily distribute its innovative hosted contact center solutions to their customers all over the world. One of the first companies to join the new reseller program is BayanTrade, a leading knowledge process outsourcing (KPO) company in the APAC region.* <http://www.tmcnet.com/859.1>

**Correction:** In last months Editorial Series:

### NetOp On Demand Facilitates Fast and Accurate Tech Support

By Tonya Hottmann, Head of Marketing for the Americas, NetOp  
We inadvertently misspelled the authors name, we apologize for the mistake.

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

# Teleconferencing on the Rise

This month High Priority features an interview with Kent Charugundla, CEO and president of Eagle Teleconferencing. Charugundla is a well-known telecommunications entrepreneur with diversified global experience in IP/telecom, conferencing, call centers, networking and outsourcing. As our readers are increasing their use of multimedia conferencing, including audio, video and Web conferencing services, this interview should be of extreme interest. Charugundla brings in-depth insights for the teleconferencing market, as well as practical recommendations.

RT: What are your views on future of teleconferencing services?

KC: First, let me offer a broad perspective of the teleconferencing market, whose legacy is, remarkably, now over 50 years old. According to industry reports, the conferencing market is growing at a rapid rate and is expected to reach about \$4 billion by the

growing market appetite. Eagle Teleconferencing employs a state-of-the-art communications infrastructure, with the use of all industry leading standards.

We do expect consolidation, as the economies of scale make a big difference in this highly competitive industry. As you know, [Cisco \(quote - news - alert\)](#) recently bought WebEx to gain a leadership position in Web conferencing market. Large players such as [AT&T \(quote - news - alert\)](#) and [Verizon \(quote - news - alert\)](#) are outsourcing their teleconferencing services along with their own facility-based services to meet global competitive pressures, while a few medium size companies such as ours, with years of strong marketing, business, global infrastructure, and operation experience, will continue to transfer billions of minutes of traffic over the global network, optimizing global skill-sets and cost-effective structure.

RT: How do you see multimedia conferencing shaping the overall teleconferencing market?

KC: Multimedia conferencing revolutionizes everyday tasks such as management, business operation, training and communication among geographically dispersed teams. It increases productivity and reduces travel time and cost, while offering a personal mode of communication.

Internet technology now enables interactive, live sharing of audio, video and desktop applications during a conference session.

**At this time, two parallel growth areas are occurring in the teleconferencing industry. Definitely, there is tremendous growth in Web conferencing and video conferencing, as its acceptance and cost effectiveness become more relevant. Simultaneously, there is significant growth for audio conferencing services.**

end of this year. North America accounts for about 70% of this exciting market. Industry revenue is growing about 10% per year and calling volume is growing over 20%. Our growth is above the industry norm and we are seeing a bright future for hosted multimedia teleconferencing services. We are continuously investing in building and expanding our global network infrastructure and the bridge capacity to meet





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Rich media data streams carry voice, video, and application data for end users to do things such as make conference calls, view live or streamed video, share application data with others, listen to voice mail or view video email, conduct instant messaging with colleagues, just to give a few examples. Multiple users participating from geographically distant locations can collaborate on applications and share visual information while they discuss a project together.

At this time, two parallel growth areas are occurring in the teleconferencing industry. Definitely, there is tremendous growth in Web conferencing and video conferencing, as its acceptance and cost effectiveness become more relevant. Simultaneously, there is significant growth for audio conferencing services. As Tom Friedman described economies of global competitive forces in his book, *The World is Flat*, the phenomena is spreading rapidly. Now a small business owner can think globally without any limitations, due to access to global communication tools. The globalization trend continues to be very promising for audio, video and Web conferencing, and we continue to be quite bullish about it. In brief, conferencing has now reached a stage of acceptability for small and medium size businesses globally.

**RT: What is your business model for the teleconferencing market?**

**KC:** Our business model is bottom-up. Let me explain what I mean. We want to migrate our end-users from audio to Web-based services to video conferencing. We are catering to small and medium size businesses with innovative pricing schemes, bundling, service levels, and service delivery so that these customers are delighted.

We have worked very hard to create a very simple business relationship with our thousands of customers so that they can use our teleconferencing platforms, follow the migration path, and grow as per their scalability needs in a cost-efficient manner. The way we deliver our services is using our global network infrastructure, automation of our business processes, and via telephone and Internet.

**RT: How do you see IP communications and wireless communications evolving within your teleconferencing infrastructure?**

**KC:** Historically, teleconferencing is an

outcome of basic telephone services, and consequently, the legacy network infrastructure is based on the time-division multiplexing technology. During last 10 years, we have evolved our infrastructure to support both IP communications and wireless communications. Our audio bridging network handles any originating or terminating traffic, whether it is landline phone or IP phone or wireless phone, anywhere in the world, at any time. We also offer Web-based services as well as Web conferencing services. Eagle Teleconferencing uses pure IP for all inbound and outbound network connectivity.

As discussed earlier, we do not position ourselves as a technology leader, but we are a strong market-driven leader. We analyze the needs of the mass market, and develop a market driven application to meet competitive prices and high quality requirements of our prospective and existing customers. At this time, video conferencing is still at its infancy and technology companies have yet to invent low cost, low maintenance hardware for mass market. Within next few years, we will expand our business model of video conferencing and move aggressively into the video market.

**RT: You manage a wide range of telecom services and diversified user groups. Where do you see significant growth for teleconferencing?**

**KC:** We are witnessing significant teleconferencing growth in the U.S. market due to Internet and wireless communications. Today, revenue from audio conferencing segment is the highest, as millions of audio teleconferencing calls are made worldwide daily. According to Frost & Sullivan's U.S. Audio Conferencing Services Market report, total traffic volume is expected to reach 35 billion minutes in 2010. With our teleconferencing grid type network infrastructure, we have capacity to handle over 10 billion minutes annually.

We believe that IP infrastructure transformation will continue to evolve and replace the legacy TDM ([define - news - alert](#)) system within next 10 years. As billions of dollars have been already invested in legacy voice communications infrastructure, the IP replacement will happen gradually to be justified economically. In summary, teleconferencing will continue to be a healthy traditional service market.

**RT: You have a global operation and you've recently been focusing on India. What makes the Indian market attractive?**

**KC:** We see the potential for large growth for teleconferencing in developing markets such as India, where we have a strong presence. The growth in India last year was 109%. We are using our India facility for our global back-office support to take the labor cost advantage. India produces about two million college graduates every year, one of the largest supplies of graduates in world. A number of highly competent Indian enterprises have established excellent integrated on-site/off-shore business models optimizing skill sets, operating efficiency, Quality of Service, and superb global delivery systems. This is the market segmentation which we are focusing on in India.

India has the advantage of a late start, as they are able to invest in the most advanced network infrastructure. It is home to two largest fiber optics companies in the world: Reliance (FLAG) and VSNL (Tyco & Teleglobe). There are advantages for India having these two, in that they offer competitive pricing and advanced network infrastructure. Reliance and VSNL have already fibered most of India, including small villages, thus preparing the country for the global market. This helps us to extend our market reach to the second and third tier cities.

**RT: What is the effect of social networks on teleconferencing?**

**KC:** Online social networks, such as MySpace, Friendster and LinkedIn, are helping individuals develop personal and professional relationships more than ever before. Traditionally the real value of online communities in business is that you can bring people together online and add layers of connectivity such as teleconferencing for multi-party events.

Business teleconferencing is on the rise, opening channels of communication for businesses with more efficiency than ever. Today, companies are utilizing telephone and Web conferencing as new ways to drive results and boost bottom-line revenue. Social networks have replaced the more traditional boundaries. Today globalization suggests a broader, more complex relationship between





# “yes!”

## to Contact Center

**Managers** who care more about a product's capabilities than about a vendor's name.

### Give legacy vendors their due.

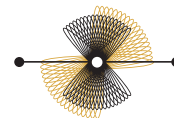
Whenever they lose ground in a market, they acquire another vendor's products in an attempt to move back up the list.

Two problems. Acquired products deliver more complexity than capability. And implementing them isn't always the smartest move for a contact center.

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global societies than was evident prior to the end of the Cold War and the emergence of the World Wide Web/Internet to communicate and disseminate information.

As a consequence of the profound social, political, and cultural transformations that have occurred since, it is critical to incorporate use of the broad array of all electronic resources. For better or worse, the

social network world is here to stay and that global society is being divided into two groups: "communication rich" and "communication poor."

**RT: How does teleconferencing help businesses increase productivity?**

**KC:** Our ConferenceLine service is a powerful productivity tool, as business objectives can

be achieved without a face-to-face meeting. Telephone conferencing cuts business costs, saves time (and, as we all know, time is money) and saves cash flow that can be used for higher business priorities. It makes good business sense to spend your money wisely when it comes to daily, weekly, monthly, quarterly or annual business telephone conferencing. Mobility is now an integral part of business and using communications intelligently is a necessity.

ConferenceLine is a solid personal productivity tool to do business. In today's competitive business environments, organizations around the world are looking for new and innovative ways to get the most of their meetings. We make it easier and far more cost effective to collaborate with co-workers, partners, and customers locally and globally. It should be noted that ConferenceLine is an enhancement to business communications, not replacement.

**RT: Where do you see competition in the service provider market?**

**KC:** Facility-based conference line services can be divided into three segments: audio, Web and video. This represents over \$4 billion in global revenue among large, medium, and small service providers using TDM-based and IP based platforms. AT&T, Verizon, Genesys, InterCall, Premiere and WebEx dominate the tier 1 market. We have also seen strong competition in our European and Asian markets. The cost of conference line services will continue to drop.

Our strategy is a bit different and we strongly believe in extracting business values from economies of scale using global network infrastructure and global human resources, and offering the most competitive prices in the market place. Specifically, we believe that audio portion of conference line services is now a commodity and the cost of conferencing will continue to drop as new IP based bridging equipment players provide competitive solutions. For facility-based service providers for whose annual volume is less than one billion minutes, it will be extremely difficult to survive long-term.

We have global operations, network assets, and talents dispersed globally. We are investing heavily into Europe and Asian markets. We see that the U.S. will be leading the world in innovation, but deployment of network assets, skills and network operation will be continuously evaluated globally to extract maximum financial benefits.

**ice** 2007 ATA CONVENTION & EXPO Creating ICE in the Desert

**on the verge of extinction:**  
**the customer meltdown**

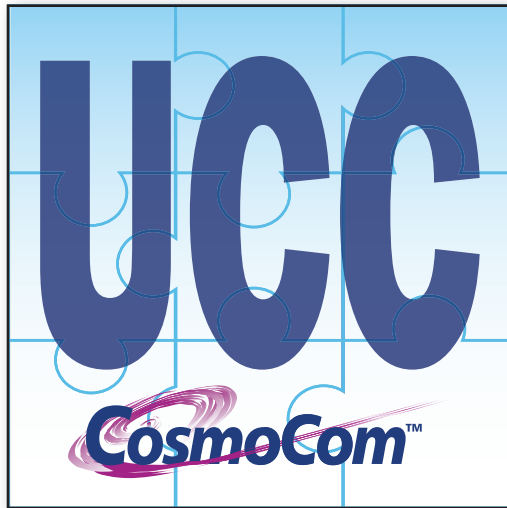
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<http://www.tmcnet.com/861.1>

### Study Shows UK Contact Centers Struggling with Training and Management

Recent research findings published by the CCA, the Professional Body for Customer Contact and Kaisen Consulting indicates that there is still much work to be done in UK contact centers to improve recruiting, training and management of employees. Until these centers can master these elements, they will continue to struggle with increased costs and decreased customer service deliverables. As a result, they will be unable to maximize the full benefit that contact centers are designed to provide.

<http://www.tmcnet.com/862.1>

### Interactive Intelligence's Contact Center Software Earns VEGAS.com a Best Technology Innovation Award

In 2005, VEGAS.com, one of the largest city destination travel websites in the world, installed Interactive Intelligence's ([news](#) - [alert](#)) Customer Interaction Center (CIC) software in its customer service center. Two years later the company won Contact Center World's "Best Technology Innovation Award," which was presented during the "Best of the Best in Americas" conference held earlier this month in Orlando, Fla.

<http://www.tmcnet.com/863.1>

### Five9 and BayanTel Team to Offer Hosted Contact Center Solution Designed for Filipino Outsourcers

On-demand call center solutions provider Five9 Inc. ([news](#) - [alert](#)) has teamed up with telecommunications and Internet solutions provider Bayan Telecommunications Inc. to deliver Bayan On-Demand, a new hosted call center solution designed for outsourcers in the Philippines. Powered by Five9's on-demand call center technology, the solution will at first be offered on a simple "pay-per-minute basis," making it simple and inexpensive for companies outsourcing their contact center services in the Philippines to make use of the solution right away.

<http://www.tmcnet.com/864.1>

### Nuance to Develop New Mobile User Interface through Acquisition of Tegic Communications

In a move which will expand its presence in the mobile industry, speech technologies leader Nuance Communications Inc. ([news](#) - [alert](#)) has reportedly acquired Tegic Communications Inc., a wholly owned subsidiary of AOL which develops embedded software for mobile devices. The deal, which is valued at about \$265 million, will give Nuance access to Tegic's T9 predictive text input software, which has reportedly been shipped to more than 2.5 billion devices. Nuance will now begin to integrate Tegic's next-generation integrated text and touch input solutions into its portfolio of voice-enabled applications for device control, mobile search, email and text messaging.

<http://www.tmcnet.com/865.1>

### Amcat Developing New IP Contact Center Model

Amcat ([news](#) - [alert](#)) is reportedly developing a new enterprise IP contact center model, Amcat Interactions, a software-only solution designed to be highly adaptable to changing business requirements. Available as either a hosted and on-premise solution, this new generation contact center software is built on Amcat's "Contact Center Software without Boundaries" design, which is said to help companies increase productivity while decreasing costs. The solution supports multi-location, distributed or home-based agents, meaning that agents can work from any location, anytime, and thus can be readily "activated" to meet spikes in volume. By leveraging a "virtual-

ized" contact center environment, companies can better meet the needs of their customers by having just the right number of agents — including those with the right skill sets — available to handle phone, email, text and web-chat contacts.

<http://www.tmcnet.com/866.1>

### Glowpoint Unveils Two-Way HD Video Solution for Call Centers

Some doubted that it would ever happen — and many questioned the value of even doing it — but video is now making its way into call and contact center software applications at a rapid pace. As such, Glowpoint Inc., ([news](#) - [alert](#)) a provider of IP-based managed video services, has introduced Customer Connect, a high-definition, two-way video call center solution, which can be integrated with any call center environment. The solution lets customers interact live with call center agents via a video link from, for example, a video kiosk, a designated "video room" at a retail store, or at a bank branch location. Thus it lets customers interact with agents in a highly personalized way that only video can deliver.

<http://www.tmcnet.com/867.1>

### Avaya Survey Shows Customer Service and Unified Communications Keys to Success

([quote](#) - [news](#) - [alert](#)) British companies consider customer service and unified communications (UC) to be the key to their success; at least according to research from Avaya. This global provider of business communications found this to be true in a survey of over 140 business managers and IT decision managers.







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

Of those individuals surveyed, over 85 percent listed the ability to drive higher levels of customer satisfaction and loyalty through improvements in customer service was fundamental. Another 82 percent felt that one of the main drivers to move to a unified communications network was the enabling of effective event or incident response together with making business processes more efficient.

<http://www.tmcnet.com/868.1>

### **True Tally Selects Envox Solution to Drive Automated Surveys**

Envox ([news](#) - [alert](#)) has announced that Envox CT ADE has been chosen to power the phone-based survey solutions of True Tally. Envox, the global provider of IP-based voice solutions announced today that its widely used IVR development tool will help drive campaigns for this survey and database company. Outbound phone-based surveys that are able to understand what respondents are saying are a vital marketing tool for gaining insight into customer behavior and delivering well-qualified sales opportunities to a wide range of organizations. To create highly targeted lists based on zip code, income, age and other essential information True Tally draws from many public and private data sources.

<http://www.tmcnet.com/869.1>

### **Epicor Enhances Epicor Clientele CRM.NET 8.5**

Epicor Software Corporation ([news](#) - [alert](#)) has announced significant enhancements to its Epicor Customer Relationship Management Suite, Epicor Clientele CRM.NET 8.5. These enhancements have been implemented to enable transparency and extensibility, broaden visibility and enrich usability. Built with 100 percent Microsoft .NET managed code and employing an adaptable service-oriented architecture (SOA) approach, this new release now supports Epicor's Productivity Pyramid. Through the combination of Epicor Portal, Service Connect and Information Worker, the Epicor Productivity Pyramid draws together people, processes and applications.

<http://www.tmcnet.com/870.1>

### **Call Center Recording in the Hosted Environment**

The rate at which contact centers are going hosted is increasing rapidly today. Agents are working from remote places like their homes and the need for giant in-house infrastructure to run a call center is no longer the case. But just because there aren't the traditional brick and mortar facilities, doesn't mean delivering consistent quality services, and training to achieve those desired results is not still needed.

<http://www.tmcnet.com/871.1>

### **Alcatel-Lucent Launches OmniTouch with CRM Integration**

Alcatel-Lucent ([quote](#) - [news](#) - [alert](#)) has launched the Alcatel-Lucent OmniTouch Contact Center Premium Edition, a contact center product designed for mid-market businesses and offering pre-integration with some CRM applications. This latest contact center product bundles the Alcatel-Lucent OmniPCX platform with Genesys 7 software, taking a "user-centric" approach that provides what company officials describe as "an advanced multimedia contact center with a fully centralized, graphical management environment that simplifies deployment and boosts customer value." Its features include call qualification, management of real-time business conditions, and innovative collaboration capabilities that link agents, experts and customers.

<http://www.tmcnet.com/872.1>

### **Tigerpaw CRM, Rackspace Hosting Strike Deals With Kaseya**

Tigerpaw Software, ([news](#) - [alert](#)) a vendor of IT business management software, has entered into a technology alliance with Kaseya, a vendor of Managed Service Automation software for IT providers. Officials of both firms say the move is to "enrich the platform for the delivery of IT managed services through the integration of functionality between Kaseya and Tigerpaw CRM+." Tigerpaw CRM+, integrated with Kaseya's MSA software, enables end-to-end CRM, service automation and inventory tracking while delivering a complete view into clients' IT environments, according to Tigerpaw CEO Dave Foxall.

<http://www.tmcnet.com/873.1>

### **SugarCRM Announces Meet-Up Group Starting in Atlanta**

SugarCRM Inc., ([news](#) - [alert](#)) a vendor of commercial open source customer relationship management (CRM) software, has announced the Atlanta Meet-Up Group, which is focused on Sugar best practices. SugarCRM users and enthusiasts from the Atlanta metropolitan area gather on "Sugar Wednesday" to teach each other new SugarCRM capabilities and techniques, swap tips and tricks, and answer Sugar-related questions at the Atlanta SugarCRM Meet-Up Group.

<http://www.tmcnet.com/874.1>

### **Report Covering Call Center Manufacturer Revenue Puts Avaya on Top for 2006**


A new report from the Telecom Intelligence Group puts global call center manufacturer revenue for 2006 at \$2.4 billion and predicts a compound annual growth rate (CAGR), based on seats, of about 3.9 percent. Leading the pack in all three vendor categories (agents, systems and revenues) for 2006 was Avaya, with 37 percent of all agent shipments. Nortel and Cisco shared second and third place, respectively, in both agents and systems, with a combined 23 percent of the market. Nortel also was second in total worldwide revenues, while Aspect was third.

<http://www.tmcnet.com/875.1>

### **Merchant Lynx Using Amcat's Contact Center Suite to Boost Agent Productivity**

Merchant Lynx, ([news](#) - [alert](#)) a national leader in credit card processing, has reportedly selected Amcat's customer interaction solutions to help boost agent productivity in its customer contact center. Specifically, Merchant Lynx is using Amcat's Contact Center Suite as the focal point of an integrated customer acquisition and sales processing system. By integrating Amcat's web-based appointment scheduler and automated outbound contact system with Merchant Lynx's database, Merchant Lynx has gained an automated appointment setting and customer acquisition process which has helped improve agent productivity.





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By Penny Reynolds  
Contributing Editor, Customer Inter@ction Solutions

# Ready, Set, Close: Preparing Your Phone Reps for Selling Success

There is more and more focus in today's call center on selling. And whether it's an outbound center whose sole purpose is telemarketing, or a traditional inbound customer service center that has decided to seize the opportunity and gain some additional revenues through an up-sell/cross-sell process, it's becoming increasingly important to polish sales skills. This article will address the three critical steps in setting up a successful telephone selling program.

### Step 1: Identify the Right People

Whether you're hiring new employees or simply identifying people in your existing call center to move into more of a sales role, making the match is critical. The most critical attribute in predicting sales success on the job is whether a person has 'enterprising' or 'initiating' traits, as opposed to 'responding' traits which are predictors of customer service success. Potential sales reps must be willing and wanting to sell.

Screen your agents and group them by strengths. Typically there will be three groups: ones with natural sales talent and attributes, those with "trainable" talent, and those with low potential for sales. While the people in the latter group might make excellent service reps, investing in sales training for this group is likely to yield little return.

The other two groups however can benefit from a sales training process. Let's discuss now what this sales training should entail.

### Step 2: Deliver Targeted Training

Once you've identified the right people for the job, the next step is to equip them with the knowledge and skills to make the sale. A successful sales training program should include a variety of components in order to prepare frontline reps to persuade customers to say "yes!"

In addition to the obvious training about the products or services to be sold, it's also important to cover the basics of telephone selling:

- Customer profiling: It's important to understand what the customer's "pain" is so a product or service can be positioned to alleviate it. Customer profiling includes recognizing a prospect's readiness to buy.
- Effective opening: The first 15 seconds of a call play a significant role in whether the prospect buys into the sales process. Sales reps need to learn to deliver an opening to establish an atmosphere of cooperation and trust.
- Information probing: Effective listening is critical to discover the prospect's needs and wants. Even if the up-sell item has already been determined, good listening skills will help with formulating the selling strategy.

- Overcoming objections: Unlike the traditional "combat zone" approach, managing resistance is really about learning how to help buyers reach a "comfort zone" that enables the conversation and sale to go forward.
- Improving voice tone: Something as simple as tone of voice can have a significant effect on a sale. Sales reps should know the basic techniques of making a good impression not only with what they say, but how they say it.
- Fine-tuning vocabulary: Buyer response can be improved simply by using more positive phrasing and eliminating negative vocabulary from the sales call. Sales reps should have a full repertoire of visual words, affirming sentences, and motivating phrases to improve customer response.
- Closing the sale. The close of the sales call is every bit as critical as the opening. Sales reps should know how to ask for a decision, whether it's taking an order or arranging for a follow-up call.

### Step 3: Measure and Reward

We can't really talk about selling without talking about incentive programs. The type of reward system and the way it's administered is the third critical ingredient in a successful selling program.

Those call centers whose sole purpose is to make outbound calls and sell typically have a simpler, more direct policy on the call process and on incentives. Policies are generally not so well defined for inbound call centers, especially those that serve primarily as service or support centers. Each organization must make a policy decision on the degree to which up-selling will be attempted and how it will be rewarded.

First, will agents be expected to attempt the up-sell on every call? Or will they be able to select the callers that appear to be good up-sell candidates? Some organizations force the up-sell on every call and obviously maximize their potential incremental revenue. But in some cases, this up-sell is done at the risk of damaging the service component of the call and the overall customer relationship.

Some organizations would argue that unless it's forced, some reps simply won't do it. The reasons they won't voluntarily do it in most cases, are 1) they're personality types that are afraid of rejection, and/or 2) they haven't been properly trained on how to do it. Do the first two steps of hiring and training properly, and you should have a workforce that's willing and able to up-sell. Then I believe you can leave the decision in the agents' hands about when it's appropriate to up-sell or not.

With respect to incentives, one of the most common questions is whether to compensate for "making the offer" versus "making the



sale.” While the first will certainly increase the number of attempts, these attempts might be poorly timed or delivered. A better policy is to reward the actual sales results, or at least a combination or ratio of the two. You may have measures that evaluate the ratio of offers to sales or simply the ratio of sales to the number of calls handled. Another possibility is to look at sales per signed-on minute to evaluate staff productivity.

### Now the Up-Sell

Now that we’ve sold you on the three steps of a basic selling program, would you like to read about some special tips for the telephone selling process? Now that wasn’t so hard, was it? And with an enticing enough offer, your phone up-sell should be well accepted as well!

### Here are some final up-selling tips for your phone reps:

- Fully complete the original sale before the up-sell process begins. Sometimes in the rush to offer the add-on product, an agent forgets some detail of the original order. Pushing

additional items too early may turn off the customer and jeopardize the original sale.

- Offer familiar items in the up-sell. The more familiar a customer is with the add-on item, the more likely he is to buy. New products take time to explain and sell, so up-selling is not the time to sell these unless the price is incredibly low.
- Provide useful advice based on other customer purchases. Your marketing department can provide you the correlations to fill in the blanks, “Many of our customers who order a \_\_\_\_ also order a \_\_\_\_ to go with it. Would you like one also?”
- Limit up-sell items to less than 25% of the original order. Even if customers are open to the up-sell, they generally have a mental limit of the amount they’re willing to spend and in the numbers we’ve seen, it’s typically 25% or less.
- Finally, think of up-selling as dessert. Picture yourself in a nice restaurant after a lovely

meal. The waiter comes by to see if you’d like dessert. Perhaps you’re too full from dinner to consider it, but you’re certainly not offended that he asked. Getting agents to think about up-selling as a nice “dessert” offering can sometimes go a long way to overcoming the reluctance to make the offer.

Creating a successful selling or up-selling program is a matter of putting the right people on the phones, training them properly, and creating policies and incentives to make them successful. Once in place, you’ll be able to maximize your dialogues with customers and impact the bottom line significantly. Happy selling!

*Penny Reynolds is a Founding Partner of The Call Center School, a Nashville, Tennessee based consulting and education company. The company provides a wide range of educational offerings for call center professionals, including traditional classroom courses, web-based seminars, and self-paced e-learning programs at the manager, supervisor, and front-line staff level. For more information, see <http://www.thecallcenterschool.com> or call 615-812-8400.*



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

# Tom Cardella Has Done It Again!!

**T**he 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. For this installment of The Boardroom Report, Nadji Tehrani, Technology Marketing Corp.'s founder, chairman and CEO, interviewed Tom Cardella, President and CEO of [Thomas L. Cardella & Associates](#). ([news](#) - [alert](#))



Thomas L. Cardella

Cardella has built another outstanding contact center outsourcing company by thinking out of the box. Based on his extensive 20 year teleservices background, he has built another solid outsourcing

company by combining his vast experience with refreshing new innovation.

During his illustrious career as Founder, President, Chairman and CEO of numerous respected and prestigious companies, Cardella was inducted into the Hall of Fame by the editorial staff of Customer Interaction Solutions, the world's first and pre-eminent magazine of the industry, since 1982. Companies such as Precision Response Corporation, Access Direct as well as many other corporations under Cardella's direction have received numerous MVP Quality and Top 50 awards from Customer Interaction Solutions magazine.

**NT: How do you differentiate your company from existing teleservices companies?**

**TC:** By way of a background, we have a contact center outsourcing company doing inbound, e-mail, web chat, and outbound. We purchased state-of-the art systems, so we're not tied with any sys-

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**During his illustrious career as Founder, President, Chairman and CEO of numerous respected and prestigious companies, Cardella was inducted into the Hall of Fame by the editorial staff of Customer Interaction Solutions® magazine.**

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tems that can't meet the needs of clients in the 21st century. The vision: having been in this industry for so long, is really to create a top shelf environment, if you will, both for our employees and for our clients. I'm doing this a couple of different ways. First of all, the pay structure for our employees is between \$11 and \$15 an hour to start depending upon the type of client we bring in. What this allows us to do, being based in the Midwest, is bring in a much higher level individual into the company. For example, the employee base, we have on our phones right now an average age of 34. The majority of our people have some level of college education. It's certainly a different environment than a lot of people picture when they discuss our industry.

What we're trying to do is change the image that the general public has about

our industry through the types of individuals we're hiring and the environment that we have created. Another thing that is of importance is when you tell clients about the image that you're portraying. It really puts you right to the top of the stack from the start, because most clients have this vision of what a call center looks like, whether their perception is real or not.

**NT: That's very important, Tom. As we both know, our industry has suffered for a long time because of the poor perception displayed by some people. Unfortunately, we get a lot of negative comments in the press because of that. What other areas do you specialize in? Are you, for example, in financial services, or insurance, fundraising, or collection?**

**TC:** There are really five areas right now that we're really focusing on, three of which we have experience in. The five primary areas are: pharmaceuticals, healthcare, telecommunications, financial services, and insurance services. I actually would add a sixth area of focus, which is education and educational services, as that happens to be an area in which we are excelling for one of our existing clients right now. The important thing is the management team I have built here in the new company. Having been the Chairman and CEO of Precision Response Corporation, plus having worked in companies like APAC



and Idelman (industry leading outsourcing companies), having been out of Omaha, and then, of course, having had Access Direct for several years, I knew several hundred managerial level people in the industry to pick from, and I think we've done a nice job in creating a strong managerial foundation. All of these people have a minimum of ten years in our industry, and some of them as many as twenty years in the industry, many of them having worked with me in the past, so they know my expectations, and we're real fortunate to have them all on my team.

**NT: That sounds excellent. I didn't know you worked for Steve Idelman.**

**TC:** I got my start there, Nadji. Actually, I got my start on the phone at Idleman, putting myself through school. The other thing is, at Access Direct and here, we use a lot of the principles that Steve and Sherri Idelman brought to the industry. Why would you reinvent the wheel when they did it so well, and, you know, if I had gotten my start with a different company, I don't know that we'd be as successful today.

**NT: I agree with you 100 percent. Steve and Sherri were one of a kind. I don't know if I shared with you that, in the early days, when I didn't know much about telemarketing back in '82, I went to Omaha and I was also trained by Gary and Mary West and Steve and Sheri Idleman. What is your opinion about the recent offshore outsourcing problems?**

**TC:** You know, a few outsourcers keep chasing the lower cost mentality, and one of the things that we've always tried to discover over the year... is what caused them to go offshore? One of the things that we've always tried to educate our clients on is that there's more to this than just the lowest hourly rate you can get. If you're willing to look at your back-end results, it may take a commitment on a client's part of two or three months with a vendor. If you're willing to take a look

at those back-end results, you can see that what you're actually paying up-front isn't how to measure the cost of the program you're running with the offshore vendor. I think people are starting to realize that, which is why I think we're coming back into the industry at a prime time.

**NT: How about client visits?**

**TC:** In 1998, I wrote an article that was publicized in your magazine, regarding the twelve steps to client services management and really how we treat the client, we've always been able to demonstrate our ability to do that really well. You know, we're really visible, myself to clients, really looking at their business every day and getting out to visit them on a regular basis. I tell clients when I'm out in front of them that this is not going to be the last time they're going to see me.

**NT: Please tell me more about differentiation.**

**TC:** You know what, let me boil it back down for you...one of the biggest differentiators that we at Thomas L. Cardella & Associates that a lot of our competition does not is we stick with the basics. What I mean by the basics is, we don't try to get fancy. We recognize that, there is a client and that we're the vendor. I mean, this is not a partnership ... partnership is one of those fluff words, if you know what I mean. I did phone time two nights ago right next to my reps, I still do phone time as do all my staff, that's a basic if you will. We're highly visible to our clients. We treat our phone staff as they should be treated, with ownership of the company, 35% of the stock of the new company, Nadji is owned by the employees...

**NT: I am very impressed by the way you treat your people. In my humble opinion, customer care begins with employee care. If you don't take care of your employees, your customers are not going to be treated right.**

**TC:** Absolutely. I refer to Access Direct quite a bit because we're really building this company on many of the same principles, but at Access Direct, anytime an employee had an anniversary, I took that person out to dinner. Now we did that in groups, but by the time we had eleven call centers, I was doing nine dinners a month, taking several hundred people out to dinner each month to celebrate their anniversary, one-year, two-year, three-year, four-year, five-year, six-year anniversaries. Sometimes it was really tough to get in the car and drive two hours to go to a dinner, especially in the dead of winter, but once I was there, I really enjoyed it. It was a way to really understand what was going on inside the company, first of all. Secondly, the folks loved it that they sat down with the CEO of the company and had a good dinner. It helped keep our attrition low, strengthened employee loyalty, and communications.

**NT: Tom, do you have any other comments that you would like to share with our readers about what the industry needs, how much we have done for the industry, how much the industry has done for itself, and that sort of thing?**

**TC:** I will share with you one of the questions I get asked a lot, and that is why I got back into the industry. I retired two years ago after having been Chairman and CEO of PRC with the anticipation I just wasn't going to get back into the industry. However, I had so many past clients approach me and ask me to get back in the industry that I really had to reconsider that initial thought. I really don't know that I could see myself doing anything else. I love doing it, I'm passionate about it. I really enjoy working with the clients, I really enjoy working with the people, and that's why I got back in. It's just a fun place to be and I really think we are making a difference in the industry and in the lives of our employees.

**NT: Thank you very much Tom. I really appreciate your time.**

# The 2007 CRM Services and Solutions Roundup

CustomerThink's Bob Thompson has said that CRM, "the successful kind, anyway, is a misnomer." Thompson's research shows that "successful companies don't manage customer relationships any more than you manage the relationship with your spouse."

This didn't stop business executives from rushing out and buying CRM software as a "shortcut" to getting more revenue and profits. Thompson defines CRM as "the management of the value exchange between the enterprise and its customers, including partners and intermediaries, such all parties benefit, leading to long-term loyal behavior along the value chain."

Not a bad definition — and note the fact that the word "technology" isn't used. This reporter once met up with Thompson in San Francisco. He met me at my hotel and we went for dinner, and on the drive he asked what I thought of CRM, how it was doing and what was going on. After I talked for a couple minutes, he said "You're just talking about technology." And he was right.

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**Sending Alex Rodriguez or Manny Ramirez up to the plate does your team no good if you don't give him a bat. Without the correct technology, having the best hitter in baseball does your team no good at all.**

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That said, you need the correct technology to implement your customer-friendly, loyalty-inducing policies and practices. Sending Alex Rodriguez or Manny Ramirez up to the plate does your team no good if you don't give

him a bat. Without the correct technology, having the best hitter in baseball does your team no good at all.

Customer Relationship Management is anything you do or use to help your company understand, relate to, and market to your customers. First you decide how you want to do that — and then you go out and find a tool to help you do it. Otherwise you're sending A-Rod up to the plate with a pool cue and Tiger Woods to the putting green with a tennis racket.

Right now the hot technology among all companies — big, large and small and a guy in his garage — is on-demand. This is where you basically pay a monthly user's fee to rent someone else's applications and data storage. It works if you want to be up and running quickly and don't want the hassle of dealing with installation and maintenance. On the other hand, going on-demand costs more, in the long run, than staying on-premise, and some companies still aren't comfortable with their data residing on someone else's server.

The basic tasks CRM focuses on were broken down a couple years ago and have stayed pretty consistent since. Analytical CRM is where you take everything you know about your customers and target markets and tease out actionable information: "If we send out follow-up reminders one day after purchase we have low success, but if we contact them a week after purchase response rates are a lot higher," or "If

we put the diapers next to the beer we end up selling a lot more beer." Here are all the zippy products for predicting customer behavior, planning and executing marketing campaigns, and analyzing reactions to price increases and whatever.

Operational CRM is collecting information from customer interactions and making it available to anyone: If Ed Jones contacts your Denver office and is dealt with, a company rep in Miami will have the information from that interaction when Ed calls her next week. Obviously this is where your call center technology is used.

Self-service CRM is sometimes euphemized "collaborative" CRM (a bad term). These are the tools for your customers to serve themselves — interactive voice response (phone menus) and automated e-mails are the main features here. The focus is on cost savings and getting operational efficiencies out of your Web site and other customer self-service points, and doing it well enough so you don't offend or alienate customers.

And the differences between the technologies used for each of these functions are as significant as the differences between tennis rackets, golf clubs and baseball bats. The technology vendors listed alphabetically on the following page offer a nice selection of CRM bats, rackets and clubs. Get what you need — and good luck in the game!

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<b>Accenture</b> <a href="http://www.accenture.com">http://www.accenture.com</a>	<b>Entellium Inc.</b> <a href="http://www.entellium.com">http://www.entellium.com</a>	<b>Optima Technologies</b> <a href="http://www.optima-tech.com">http://www.optima-tech.com</a>
<b>Access Commerce</b> <a href="http://www.access-commerce.com">http://www.access-commerce.com</a>	<b>Envision</b> <a href="http://www.envision.com">http://www.envision.com</a>	<b>Oracle Corp. (PeopleSoft)</b> <a href="http://www.oracle.com">http://www.oracle.com</a>
<b>ACT! (Sage Software)</b> <a href="http://www.act.com">http://www.act.com</a>	<b>E.piphany</b> <a href="http://www.epiphany.connectthe.com">http://www.epiphany.connectthe.com</a>	<b>PacificNet</b> <a href="http://www.pacificnet.net">http://www.pacificnet.net</a>
<b>Axiom Corp.</b> <a href="http://www.axiom.com">http://www.axiom.com</a>	<b>ESRI Inc.</b> <a href="http://www.esri.com">http://www.esri.com</a>	<b>Pivotal CRM (CDC Corporation)</b> <a href="http://www.pivotal.com">http://www.pivotal.com</a>
<b>Allegiance Inc.</b> <a href="http://www.allegiance.com">http://www.allegiance.com</a>	<b>Experian Information Solutions</b> <a href="http://www.experian.com">http://www.experian.com</a>	<b>Relavis</b> <a href="http://www.relavis.com">http://www.relavis.com</a>
<b>Amdocs</b> <a href="http://www.amdocs.com">http://www.amdocs.com</a>	<b>First Logic (Business Objects)</b> <a href="http://www.firstlogic.com">http://www.firstlogic.com</a>	<b>RightNow Technologies Inc.</b> <a href="http://www.rightnow.com">http://www.rightnow.com</a>
<b>Angel.com</b> <a href="http://www.angel.com">http://www.angel.com</a>	<b>First Wave Technologies</b> <a href="http://www.firstwave.net">http://www.firstwave.net</a>	<b>Sage</b> <a href="http://www.sage.com">http://www.sage.com</a>
<b>Aperio CI</b> <a href="http://www.aperioci.com">http://www.aperioci.com</a>	<b>FrontRange Solutions</b> <a href="http://www.frontrange.com">http://www.frontrange.com</a>	<b>Salesboom</b> <a href="http://www.salesboom.com">http://www.salesboom.com</a>
<b>Aprimo Inc.</b> <a href="http://www.aprimo.com">http://www.aprimo.com</a>	<b>IBM Business Consulting Services</b> <a href="http://www.ibm.com">http://www.ibm.com</a>	<b>Salesforce.com</b> <a href="http://www.salesforce.com">http://www.salesforce.com</a>
<b>Ardex Inc.</b> <a href="http://www.ardex.com">http://www.ardex.com</a>	<b>Infor Global Solutions</b> <a href="http://www.infor.com">http://www.infor.com</a>	<b>Salesnet</b> <a href="http://www.salesnet.com">http://www.salesnet.com</a>
<b>Ascential Software (IBM)</b> <a href="http://www.ascential.com">http://www.ascential.com</a>	<b>Inforte Corp.</b> <a href="http://www.inforte.com">http://www.inforte.com</a>	<b>SalesPage Technologies</b> <a href="http://www.salespage.com">http://www.salespage.com</a>
<b>Aspect Software Inc.</b> <a href="http://www.aspect.com">http://www.aspect.com</a>	<b>Infosys Technologies</b> <a href="http://www.infosys.com">http://www.infosys.com</a>	<b>SAP</b> <a href="http://www.sap.com">http://www.sap.com</a>
<b>Axonon Inc.</b> <a href="http://www.axonom.com">http://www.axonom.com</a>	<b>Inquire Inc.</b> <a href="http://www.inquire.com">http://www.inquire.com</a>	<b>Saratoga Systems (CDC Software)</b> <a href="http://www.saratogasytems.com">http://www.saratogasytems.com</a>
<b>BearingPoint</b> <a href="http://www.bearingpoint.com">http://www.bearingpoint.com</a>	<b>Intelliworks Inc.</b> <a href="http://www.intelliworks.com">http://www.intelliworks.com</a>	<b>SAS Institute</b> <a href="http://www.sas.com">http://www.sas.com</a>
<b>Business Objects</b> <a href="http://www.businessobjects.com">http://www.businessobjects.com</a>	<b>Interchange Solutions Limited</b> <a href="http://www.interchangelimited.com">http://www.interchangelimited.com</a>	<b>Siebel Systems (Oracle)</b> <a href="http://www.oracle.com/applications/crm/siebel">http://www.oracle.com/applications/crm/siebel</a>
<b>CAPgemini</b> <a href="http://www.capgemini.com">http://www.capgemini.com</a>	<b>Interface Software (LexisNexis)</b> <a href="http://www.interaction.com">http://www.interaction.com</a>	<b>Soffront Software Inc.</b> <a href="http://www.soffront.com">http://www.soffront.com</a>
<b>Centive</b> <a href="http://www.centive.com">http://www.centive.com</a>	<b>Intuit Inc. (QuickBase)</b> <a href="http://www.quickbase.com">http://www.quickbase.com</a>	<b>SPSS</b> <a href="http://www.spss.com">http://www.spss.com</a>
<b>Centric CRM Inc.</b> <a href="http://www.centriccrm.com">http://www.centriccrm.com</a>	<b>iRadeon</b> <a href="http://www.iradeon.com">http://www.iradeon.com</a>	<b>StayinFront</b> <a href="http://www.stayinfront.com">http://www.stayinfront.com</a>
<b>Citrix Systems Inc.</b> <a href="http://www.citrix.com">http://www.citrix.com</a>	<b>KANA Software Inc.</b> <a href="http://www.kana.com">http://www.kana.com</a>	<b>SugarCRM</b> <a href="http://www.sugarcrm.com">http://www.sugarcrm.com</a>
<b>Clear Technologies Inc.</b> <a href="http://www.cleartechnologies.net">http://www.cleartechnologies.net</a>	<b>Kintera Inc.</b> <a href="http://www.kintera.com">http://www.kintera.com</a>	<b>Talisma Corporation</b> <a href="http://www.talisma.com">http://www.talisma.com</a>
<b>Cognos Inc.</b> <a href="http://www.cognos.com">http://www.cognos.com</a>	<b>Knova Software</b> <a href="http://www.knova.com">http://www.knova.com</a>	<b>TARGUSinfo</b> <a href="http://www.targusinfo.com">http://www.targusinfo.com</a>
<b>Consona Corp.</b> <a href="http://www.consona.com">http://www.consona.com</a>	<b>Lagan</b> <a href="http://www.lagan.com">http://www.lagan.com</a>	<b>TechExcel Inc.</b> <a href="http://www.techexcel.com">http://www.techexcel.com</a>
<b>CustomerSat Inc.</b> <a href="http://www.customersat.com">http://www.customersat.com</a>	<b>Maximizer Software Inc.</b> <a href="http://www.maximizer.com">http://www.maximizer.com</a>	<b>Tibco Software Inc.</b> <a href="http://www.tibco.com">http://www.tibco.com</a>
<b>Deloitte Consulting LLP</b> <a href="http://www.deloitte.com">http://www.deloitte.com</a>	<b>Melissa DATA Corp.</b> <a href="http://www.melissadata.com">http://www.melissadata.com</a>	<b>Update Software AG</b> <a href="http://www.update.com">http://www.update.com</a>
<b>Doubleclick Inc.</b> <a href="http://www.doubleclick.com">http://www.doubleclick.com</a>	<b>Microsoft Dynamics CRM</b> <a href="http://www.microsoft.com/dynamics/crm">http://www.microsoft.com/dynamics/crm</a>	<b>Trillium Software</b> <a href="http://www.trilliumsoftware.com">http://www.trilliumsoftware.com</a>
<b>Edge Interactive</b> <a href="http://www.edgeip.com">http://www.edgeip.com</a>	<b>NetSuite Inc.</b> <a href="http://www.netsuite.com">http://www.netsuite.com</a>	<b>Unica Corp.</b> <a href="http://www.unica.com">http://www.unica.com</a>
<b>EdGenuity</b> <a href="http://www.edgenuity.com">http://www.edgenuity.com</a>	<b>OKS-Ameridial</b> <a href="http://www.oksgroup.com">http://www.oksgroup.com</a>	<b>Unisys</b> <a href="http://www.unisys.com">http://www.unisys.com</a>
<b>eGain Communications</b> <a href="http://www.egain.com">http://www.egain.com</a>	<b>Oncontact Software Corp.</b> <a href="http://www.oncontact.com">http://www.oncontact.com</a>	<b>Verint Witness Actionable Solutions</b> <a href="http://www.verint.com">http://www.verint.com</a>
<b>eLoyalty Corp.</b> <a href="http://www.loyalty.net">http://www.loyalty.net</a>	<b>OnyxSoftware</b> <a href="http://www.onyx.com">http://www.onyx.com</a>	<b>WildDucks Systems Inc.</b> <a href="http://www.wildducks.com">http://www.wildducks.com</a>

# The 2007 Headset Technology Review

In order to have successful interactions in the call center, every piece of equipment on the network must perform to the highest of standards, including the headsets. Companies that purchase inexpensive headsets often pay the price later, when their agents begin to complain about poor sound quality, broken parts, lack of comfort, or worst of all, damage to their hearing.

Many companies are now realizing the importance of purchasing high quality headsets for their agents. They're starting to look at things like the type of the speaker material; the strength of the wire harnesses; the sound quality; the level of comfort; noise canceling capabilities; and the overall functionality of the headset, before making a buying decision.

**Give your agents cheap headsets that are uncomfortable, break easily, deliver poor sound quality, or do a lousy job of canceling out external noise and you are more than likely affecting their performance.**

And there are a lot of factors to consider when buying a headset. Beyond the quality of the materials used and the craftsmanship, there are many different styles and types on the market. For example, there are wireless headsets, corded over-the-head headsets, corded over-the-ear headsets, cordless phone headsets and VoIP headsets. Choosing the right type for your call center can be a daunting task. You might want to consider whether your agents need to be mobile while taking calls, in which case you'll want to go with wireless headsets. Or, if you have agents who are picky about comfort or who are concerned

about hearing damage from "acoustic shock," you might want to base your decision on those factors as well. And if your call center has gone all-IP, a shipment of VoIP headsets might be in order.

The important thing to keep in mind is that the headset plays a critical role in agent performance. For your agents, the headset is perhaps the most significant piece of equipment, because, other than their chair, it is the one thing they must be in direct contact with throughout the entire shift — every shift, week in, week out. Give your agents cheap headsets that are uncomfortable, break easily, deliver poor sound quality, or do a lousy job of canceling out external noise and you are more than likely affecting their performance. And as study after study shows, happier agents perform better. So, having good headsets in your call center isn't a luxury, it is a necessity.

To learn more about the latest trends in headset technology for the call center, we asked three of the leading headset manufacturers — Senheiser, Plantronics and GN Netcom — to provide us their views on what is happening now and what is coming in the future. We have also provided a list of companies that either manufacture or resell (where indicated) headset products. We urge you to visit these companies' Web sites for more information.

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**Ahern Communications (reseller)**

<http://www.aherncorp.com>

<http://www.callcenterheadsets.com>

800-451-5067

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**Black Box Network Services (reseller)**

<http://www.blackbox.com>

602-273-6400

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**CommuniTech (reseller)**

<http://www.communitech.com>

888-795-7222

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**Dowumi Corp.  
(under the Vonia brand)**

<http://www.dowumi.com>

630-629-1897

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**Elevn Networks (reseller)**

<http://www.elevnnet.com>

780-485-0646

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**eMicrophones, Inc. (reseller)/  
SpeechControl.com (reseller)**

<http://www.emicrophones.com>

<http://www.speechcontrol.com>

914-556-8286

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**Founder's Telecom (reseller)**

<http://www.founderstelecom.com>

800-333-0020 or 512-858-9677

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**GBH Communications (reseller)**

<http://www.gbh.com>

800-222-5424/818-246-9900

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**Global Teck Worldwide (reseller)**

<http://www.global-teck.com>  
703-766-6363

**GN Netcom  
(a GN Great Nordic company)**

<http://www.gnnetcom.com>  
800-826-4656

**Headset Discounters (reseller)**

<http://www.headsetdiscounters.com>  
800-440-7639

**HeadsetExperts.com (reseller)**

<http://www.headsetexperts.com>  
800-641-6416

**Headset Innovations (reseller)**

<http://www.headsetinnovations.com>  
800-820-1744

**Headset Zone (reseller)**

<http://www.headsetzone.com>  
800-533-4014

**Headsets.com (reseller)**

<http://www.headsets.com>  
800-432-3738

**HeadsetsPod.com (reseller)**

<http://www.headsetspod.com>  
908-370-6545

**Hello Direct (part of the GN  
Netcom/GN Great Nordic family)**

<http://www.hellodirect.com>  
800-435-5634

**JABRA Corporation (part of the GN  
Netcom/GN Great Nordic family)**

<http://www.jabra.com>  
630-442-6900

**Phonemaster Communications, Inc.  
(reseller)**

<http://www.etelephonesystems.com>  
800-339-4588

**PhoneMerchants (reseller)**

<http://www.phonemerchants.com>  
877-291-1076

**The Phone Source (reseller)**

<http://www.thephonesource.com>  
866-397-3351

**Plantronics**

<http://www.plantronics.com>  
800-544-4660/831-426-5858

**Polaris (reseller)**

<http://www.polaris.com>  
T - 61 3 9320 1200

**Pro Tech Communications, Inc**

<http://www.protechcommunications.com>  
772-464-5100

**Sennheiser Communications**

<http://www.sennheisercommunications.us>  
860-434-9190

**Tape-Tel Electronics (reseller)**

<http://www.tapetel.com>  
800-228-1751

**TWAcmm.com, Inc. (reseller)**

<http://www.twacomm.com>  
877-892-2666

**VXI Corporation, Inc.**

<http://www.vxicorp.com>  
800-742-8588

**Windows to Technology Ltd. (reseller)**

<http://www.win2tech.com>  
613-961-1571/800-964-8810

# Headsets on the Horizon: The Future of Wireless in the Contact Center

Contact centers are constantly challenged to improve customer satisfaction and agent productivity. Many are turning to wireless headsets to help meet these challenges. In a contact center, new wireless headsets help improve call speed resolution of customer problems and enable floor supervisors to remain “on call” and engaged even when they’re away from their desks.

## Ensuring Customer Satisfaction

The success of most contact centers is judged by customer satisfaction levels. While there are many elements that impact customer interactions, the speedy resolution of problems is one of the most important. Wireless mobility helps floor supervisors solve customer problems in real time without the need to put customers on hold or call them back once they’ve retrieved the necessary information. Floor supervisors can be more efficient, thus decreasing call time, by moving about the office to perform supportive tasks and actively engage with agents. The latest headsets let users roam hundreds of feet away from their desks, with excellent call clarity, while staying connected.

In the event that a call needs to be escalated to a supervisor, hold time is minimized, since the supervisor is available to answer the call even if away from their desk with the remote call answer/end capabilities of the newest wireless headsets on the market. The supervisor can also visit the agent’s desk to lend support and provide quicker resolution.

Whether new hire orientation or a refresher session with a senior agent, keeping the agents properly trained is a round-the-clock task. Wireless headsets

increase training effectiveness by allowing the coach to observe agents’ key strokes and body language from afar without the agent knowing — eliminating the need for desk side monitoring. This creates a more natural training environment, where supervisors can gain a true assessment of agent performance.

## Guaranteeing Employee Comfort and Convenience

In addition to the well-known ergonomic benefits of headsets, the latest wireless systems provide other features that are useful for contact centers. For example, most headsets now offer extended battery life so that contact center associates can work an entire shift without having to stop and plug in to recharge the battery. Some systems also offer a base that easily pairs with several different headsets so that as shifts change, agents can immediately start working. Using a shared base also helps lower expenses as contact centers only purchase an additional headset top, versus an entire system.

## Maintaining Sound Quality

One of the main elements affecting a customer’s impression of a contact center is the sound quality that the customer encounters. Background noise and crack-

ling audio can make a contact center seem unprofessional, no matter how skilled the agent. The latest wireless headsets have noise-canceling microphones that filter background noise and enable crisp audio quality. Digital signal processing (DSP) is a new technology that some of the latest headsets use to mitigate echo and uneven amplitude.

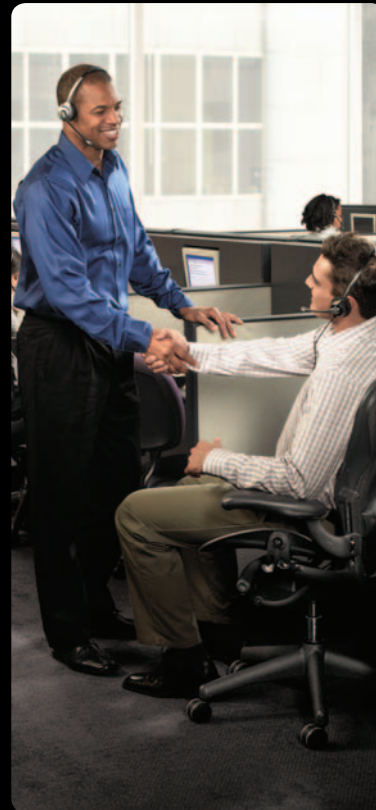
Headsets that are 1.9GHz DECT 6.0-compliant are gaining popularity in contact center environments because they promote clear calls without interference from typical office equipment, like Wi-Fi networks, security systems and microwave ovens. These headsets are particularly attractive because they operate in a protected, voice-dedicated frequency.

Today’s wireless headsets are compatible with a variety of telephony infrastructures, including IP, and legacy PBX equipment. This is beneficial, as audio deterioration, like latency issues, pops and ticks, often occurs as a result of incompatible signals or equipment.

It’s clear that wireless headsets offer contact centers many benefits that can help improve service and impact the bottom line. As innovations in the space continue to develop, so will the positive affects on contact centers.





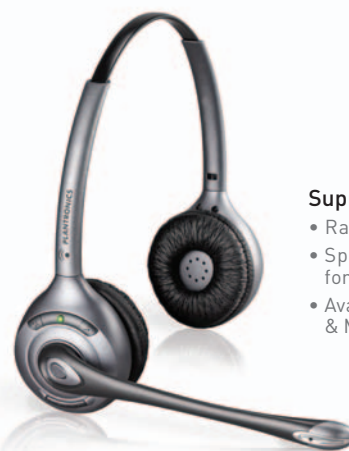


## HANDLE IT ALL WITHOUT MISSING A CALL

### GO WIRELESS AND GO WHERE YOU'RE NEEDED

Everything changes when your headset goes wherever your feet take you. So free yourself with the SupraPlus® Wireless, and start handling escalations and speeding resolutions without missing your own important calls.

Learn more at [www.plantronics.com/goodcall](http://www.plantronics.com/goodcall)



#### SupraPlus® Wireless

- Range up to 300 feet
- Specifically designed for the contact center
- Available in Binaural & Monaural models



# The Evolution of a Headset

Today's contact centers are the epitome of efficiency. Through technology and logic, corporations large and small are able to effectively manage their customers in bulk. Thus, the use of headsets in the call center has increased out of necessity. Without them, agents would be inefficient, susceptible to injury and unable to multitask. Sennheiser Communications, an advocate of safe acoustical technologies, uses many of these advancements in extreme environments from concert stages to contact centers all over the globe. Further, the penetration of wireless headsets in the contact center has boosted efficiency for workers that need mobility. As wireless technology improves, headset technology follows and permits headset users access to critical information faster and farther than ever before. Unfortunately, many wireless solutions lack true user-efficiency via multi-device interfacing with concurrently extended range.

Enter a new age of wireless headsets from Sennheiser Communications. The venerated BW900 fuses mobility and efficiency in one simple, powerful and easy-to-use device. Imagine a headset that communicates voice with a quality that rivals a wired handset. Imagine a headset that interfaces with your desktop phone and your voice-enabled Bluetooth device at the same time. Imagine that same device, seamlessly toggling between the mobile in your pocket and your land line with a range of up to 300 feet. This high-performance professional headset was designed to solve common communication problems and boost efficiency.

Call quality is no longer a luxury in a wireless headset. Rather, it is tantamount to the success of the communication. By introducing Adaptive Intelligence, the BW900 ensures that every call is made with the clarity you would expect out of a wired handset. This highly advanced digital signal processing (DSP) circuit listens to the user environment while in

chorus adapting the volume and microphone gain settings to optimum levels for that user. Further, an advanced set of noise filters intelligently remove background noise while keeping voice quality intact. This occurs in real-time, even with a rapid change in environment such as the relocation from a quiet office to a noisy sales floor. The users' preferences are stored for a customized communication experience from the moment the headset is worn.

Incoming call quality is just as critical. Intelligible audio is required for accurate, timely data processing or the call quickly becomes a marathon instead of a track meet. Headset audio should be pristine with consistency in volume level. Sennheiser's BW900 features ActiveGard™ (also found in every contact center headset they produce) to prevent sudden, harmful bursts of volume from reaching the users' ear. ActiveGard is always on and always working to protect the user from potential hearing damage.



Another key component of efficiency in a wireless headset is battery life. After all, if a headset is not usable, you cannot experience the benefits of that headset. Sennheiser responded to this challenge by providing a user-replaceable battery that can be changed in the middle of a call without disconnecting the other party. The spare battery charges up faster than it is depleted, allowing for unlimited talk time via hot-swapping.

Managing a device with this many advanced functions would seem like a daunting task, however Sennheiser Communications has streamlined the feature-set into a friendly interface that is both elegant and simple to use within moments after opening the box. One can easily see the effective use of time from the arrival of the package to the last call of the day. As an all-in-one device for voice communication, it is also a device you can expect to be comfortable to wear for extended periods. A lightweight, ergonomic design with robust build qualities and a two year warranty ensures long operating life without sacrificing comfort.

Through the years, the headset has evolved from an option to a requirement. Armed with exclusive technologies posed to take contact centers into the future, the Sennheiser Communications BW900 is the professional's choice for state-of-the-art voice communication.





# Adaptive

You need a wireless headset that works with you, not against you. The Sennheiser BW900 features Adaptive Intelligence for automatic, real-time audio adjustments that optimize call quality according to your personal preferences. The BW900 is ready for the dynamics of your contact center with seamless toggling between Bluetooth enabled mobile devices and your desktop phone and a range up to 300 ft.

[www.sennheiserusa.com/adapt](http://www.sennheiserusa.com/adapt)

# Future Trends in Call Center Headsets

**T**echnological advances in call center and office headsets have created endless possibilities for increased industry efficiency and agent proficiency. Headsets, however, have yet to reach their full potential. Products that fail to filter ambient noise can limit an agent's ability to communicate, while unwieldy design makes it impossible for agents to feel comfortable while working. As we anticipate the future of call center and office headsets, we see that the trends of design, technology, wireless connectivity and multi-use enhancements contribute to a common goal of increased call center efficiency and flexibility. Improvements in standard capabilities will allow agents unprecedented comfort and clarity. Meanwhile, innovation will pursue inter-functionality and make headsets much more multi-faceted tools.

## Design

Headset providers continue to introduce increasingly smaller and more lightweight designs. This directly translates to increased user comfort.

Without the distraction of constantly readjusting an uncomfortable product, agents can efficiently deliver excellent service, customer after customer. While the widespread popularity of earhooks and headband headsets among agents shows no signs of letting up, a behind-the-neck wearing style is becoming more in-demand.

## Technology Innovation

Just as good design increases user comfort, superior performance eliminates noise. Features like effective noise cancellation provide for crystal clear communications in noisy working environments. Designers and engineers also continually strive to improve audio performance. Acoustic Shock Protection that limits sudden bursts of "peak noise" to protect users hearing is becoming more and more important. Directives

passed in Europe mandate decibel limits for both peak and sustained sound levels that reach a user's ear. Agents consider these capabilities essential to their jobs, and clarity will become a standard feature among all premium headsets.

## Wireless Influence

As noise reduction and comfortable design become more commonplace, you can also expect to see greater inter-functionality. Headsets will integrate multiple interfaces for phones, and computer USB connections. That combined with Wideband audio capabilities will enable IP telephony applications with soft-phones like Microsoft Office Communicator 2007. Inter-functionality will also be evident in the influx of products that bridge the gap between standard office headsets and Bluetooth mobile headsets. Call centers will continue demand for corded headsets, and manufacturers will remain committed to producing those products. However, there is a new trend towards wireless call center headsets. After headsets have reached an industry standard for com-



fort, the next step will be toward wireless headsets, boosting user ease and enabling even higher productivity.

## Engineered with the End-user in Mind

While focusing on agent comfort, headset manufacturers often overlook a key issue: most often, their products will not have just one end user, but multiple end users. It's essential that products accommodate multiple agents with features that allow for stored personal settings and preferred volume levels. This eliminates agents having to manually readjust settings at their beginning of their shifts. Products like the Jabra GN8210 provide both of these benefits, and several others. The first headset amplifier solution to use DSP to reduce noise on incoming calls, the GN8210 also supplies unsurpassed digital protection against sudden volume peaks and automatically regulates incoming call volume per user-defined levels. These amplifiers represent state-of-the-industry solutions for accommodating multiple users while achieving unprecedented sound quality.

While these trends might differ in terms of functionality, they all contribute toward improving the end-user(s) experience, which directly results in greater call center productivity.



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# Four Reasons to Select Ontario for Your Call Center

Ontario, Canada continues to be a hot location for U.S. companies to near-shore their call center operations. According to statistics provided by the Ontario Ministry of Economic Development & Trade, the province is now home to more than 6,600 call centers employing more than 300,000 people — and that number is expected to grow as more U.S. companies discover that Ontario is an ideal location for establishing high quality, interactive call centers serving their higher value and existing customers. With its skilled labor force, low cost of doing business, modern telecommunications infrastructure and strong economic incentives, Ontario is poised to see steady call center growth over the next several years.

For those of you not familiar with Ontario, here's a quick recap: Located in east-central Canada, bordered by Manitoba to the west, Quebec to the east, and Michigan, New York, Ohio, Pennsylvania, Minnesota to the south, (plus three of the five Great Lakes) Ontario has a population of about 12.2 million, making it the largest of Canada's provinces and territories. The capital of Ontario is Toronto, the largest city in Canada. And oh, by the way, Ottawa, another of Ontario's cities, is the capital of

Carrey, and musicians Neil Young, Alanis Morissette and Avril Lavigne. It is a gorgeous place with crystal clear streams and rivers, dense forests and wide open prairies, perfectly symmetrical pine trees and starry nighttime skies. It is also home to Niagara Falls, a popular tourist destination and one of the natural wonders of the world.

According to Deborah Clark-Forster, senior business consultant for the Ontario Ministry of Economic Development & Trade, Ontario is "very well positioned for the future with very solid growth" in the contact center industry.

"The sector is evolving into higher value contact center applications, combined with the emergence with BPOs specific to IT, finance and accounting, as well as HR," Clark-Forster said during a recent interview. "In 2006 alone our team attracted 24 new or expanded centers to Ontario, creating 8,600 jobs across 18 communities. And we're on track to see comparable investment in 2007, as well as in 2008."

Clark-Forster pointed out that many U.S. companies are now taking a "global

approach" to their call center operations, in which they identify which applications are best suited to be implemented in near-shore locations, such as Ontario, versus off-shore locations such as India and the Philippines. As such, Ontario is primarily attracting technologically-advanced contact centers where the emphasis is on high quality customer service.

"We've attracted a solid complement of contact centers ranging anywhere from 100 to 1,000 or more seats," she said, adding that in 2006, most of the centers the agency handled fell between 100 to 500 agents. "We had a 1,200 seat operation, a couple of 1,000 seat operations, several around 400-500 operations and a few around 300, as well as a few around 100, so I think on average it's more on the high end."

And the growth is spread across all industry segments.

"We continue to see tremendous growth in customer service, help-desk, human resources, finance and accounting, order management and insurance-



Leading global business process outsourcing (BPO) company Teletch opened this call center facility in Trenton, Ontario, in August 2006. (Photo courtesy of Ontario Government)

**In 2006 alone our team attracted 24 new or expanded centers to Ontario, creating 8,600 jobs across 18 communities. And we're on track to see comparable investment in 2007, as well as in 2008.**

Canada. Ontario is the home of the Toronto Maple Leafs, Ottawa Senators and Toronto Blue Jays. It is the birthplace of actors Mike Meyers, Dan Aykroyd and Jim

based contact centers and/or BPOs," she said. "Personally, the industry sectors I see growing fastest include financial services, retail, wholesale, manufacturing, telcos, utilities, transportation and services — it really is a broad range."

In fact, the call center industry has grown so much in Ontario that in some communities it has topped manufacturing as the primary industry. For example, in Sault Ste. Marie, the number of people who work for the local call cen-

**Ontario offers the lowest health care costs of the G-7, with employers saving nearly 60 percent in comparison to the U.S.**

ters just recently surpassed that of 100-year-old Algoma Steel, which has long been the community's primary employer. Major corporations having opened call center operations in Ontario in recent years are Dell Inc., which recently selected Ottawa for a new 156,000 square foot center to provide technical support and sales to its customers in North America, and SITEL Corp., which recently launched a customer support center in Kanata. Other companies operating call centers in Ontario include StarTek, Sunoco, Union Gas, Research in Motion, Rogers Communications, Allstate Insurance, American Express, HP, Oracle, Panasonic, Accenture, IBM and Bell Canada, to name some.

Let's take a look at some of the advantages Ontario has to offer U.S. businesses considering locating their call centers there:

### The Economic Advantages

First, there is the favorable exchange rate, which is currently about 4 cents on the U.S. dollar (yes, the dollar is weaker than it has been, but consider that in 2002 it was 57 cents on the dollar). Then there's the fact that labor costs average 5 to 10 percent less than in the U.S. (and labor costs are a critical consideration for companies embarking on the site selection process, as they are the biggest portion of any call center operating budget). Another draw is the fact that Ontario offers the lowest health care costs of the G-7, with employers saving nearly 60 percent in comparison to the U.S. With health costs endlessly spiraling upward in the U.S., this is one of the main things keeping business execs awake at night.

Also attracting call centers to the region are Ontario's low statutory benefits, including worker compensation, pension and unemployment taxes, which range anywhere from 30 to 50 percent lower than in the U.S. Perhaps most importantly, the province's corporate income taxes, at 36.12 percent, are among the lowest in North America (averaging four percentage points lower than in the U.S.).

In addition to the basic economic incentives, the provincial government also offers several programs through which qualifying companies can get interest free loans and grants to help offset the cost of opening a new call center. For example, in Northern Ontario, a

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number of contact centers have benefited from the Northern Ontario Heritage Fund, which provides new centers with up to \$1 million in a loan or a grant to help defray the start-up costs. There's also training subsidies, including a program run provincially through the Ministry of Training Colleges and Universities, which help defray the cost of recruiting and training new employees.

In addition, the province recently launched a Contact Center Apprenticeship Program, administered by the Ministry of Training, Colleges and Universities, which offers eligible companies up to \$5,000 annually in tax credits for each apprentice who joins a call center as a technical support, inside sales or customer service agent.

"It's a maximum tax credit per apprentice of \$5,000 per year for a period of up to three years," Clark-Forster

said. "So the maximum tax credit per apprentice is about \$15,000."

Companies eyeing Ontario as a site for their call center operations should also consider that the overall cost of living is much lower than in the U.S. For example, electricity is significantly less expensive, due to mainly to the fact that roughly 30 percent of the province's power is hydro-electric delivered by Niagara Falls.

Another advantage of doing business in Ontario is its close proximity to the U.S. — Clark Forster points out that nearly 60 percent of the

U.S. population lives within a two-hour plane flight of Toronto. If anything, that means less expensive travel for company managers, supervisors and executives



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(obviously Ontario is more convenient to get to than say, Manila, or New Delhi).

## The Skilled Labor Force

Aside from the economic incentives, Ontario also offers a highly skilled, well-educated and motivated labor force. With about 20 universities and 24 colleges located throughout the province, it boasts the highest education levels among the G-7, with about 58 percent of all Ontarians having completed post secondary education (as compared to the U.S. average of 38 percent). Furthermore, of the approximately 130,000 graduates a year, roughly 38 percent are graduating in the field of IT — with many having gone through specialized training programs geared specifically the call center.

“Currently we have 16 colleges with accredited programs in place to build skill sets at the call center agent, supervisory and management levels,” Clark-Forster said.

This is a key factor, because many companies are now learning that having a well-educated, well-trained labor pool has become critical in today's customer-

facing call centers, where agents must deliver service quickly and proficiently. As such, demand is increasing for agents who can handle advanced software and systems for both call center work and business process outsourcing. (In fact, it can be argued that a lack of skills and training is partly what led to the customer service problems some companies ran into after off-shoring their call center operations to India and the Philippines.) Ontario has these workers, in droves.

In addition to the high level of technical skills, Ontario's labor force is also “accent neutral” — a factor that has become increasingly important for certain U.S. companies focused on their customers. What this means, quite simply, is that Canadian call center workers don't have the thick accents that call center workers in India and the Philippines have — accents which have made it difficult, at times, for Americans to understand them. At the same time, however, more than 20 percent of Ontario's population is multilingual, speaking French, Cantonese, Mandarin, Spanish, Italian, German, Portuguese and many other languages, giving this workforce yet another advantage over its overseas competitors.

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Currently there are about 320,000 people employed in the IT space alone in Ontario — and with the province's colleges and universities are continuously pumping new, well-trained candidates into the labor force, Clark-Forster says Ontario “not only has the labor base it needs today, but also the labor force it will need well into the future.” In fact, there is such an abundance of qualified workers, she said, that a 500 plus seat call center can expect to fill all of its seats “in a matter of days.”

“Depending on the community and how they market the availability of these jobs, we see these centers being filled within days, or at the most within a two week period,” she said.

Another credit to Ontario's labor force is that fact Ontarians tend to view contact center work much more favorably than workers do in other countries. Clark-Forster said this is mainly attributable to the fact that the companies with call center operations there are now operating high-tech facilities and are therefore spending more time training their agents and providing them with access to advanced software and systems. This not only gives them the tools they need to better serve customers, but also injects them with a greater sense of accomplishment in their jobs.

**Not only does Ontario offer some of the most advanced communications infrastructure in the world, its communications costs are 30 to 40 percent lower than the U.S., due mainly to a more competitive environment.**

“Ontario has been very successful in attracting [call centers which use] more interactive and complex applications for targeting those higher value

existing customers, particularly from an inbound and a consultative sales perspective,” Clark-Forster said. “Here we're talking about things like tier 2 and tier 3 technical support — and in the end this provides gratifying work for our residents.”

Interestingly, Ontarians are among the most loyal call center workers in the world. Clark-Forster said according to recent research, the turnover rate in the contact center and BPO sector in Ontario is “less than 20 percent on average,” with absenteeism levels “at around 3 percent.” Meanwhile, companies operating call centers in the U.S. have seen turnover rates averaging 25 percent or more.

### **The Superior Communications Infrastructure**

Ontario is also an attractive place to open a call center because its core communications network is now completely fiber optic. This facilitates rapid and efficient deployment of IP contact center systems and enables companies to get their call centers up and running in much less time — and its much less expensive since there is less telecommunications infrastructure to install. Furthermore having an all-IP network already in place enables companies to monitor and control their contact center operations from a central location, such as a U.S.-based corporate headquarters. Furthermore,

having an all-IP backbone in place means companies can more quickly deploy hosted and SaaS solutions, which facilitate the “virtualized” contact center model, which is ideal for the deployment of remote or home-based agents.

However, Clark-Forster said from where she sits, the remote agent model is yet to gain momentum. “With regard to home-based or remote agents, we haven't really seen that translate into results yet,” she said. “I think what we're dealing with is this mentality among businesses that ‘we need to see our people in order to



# OUTSOURCING

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manage them,' and that's more of a cultural persona for the industry. I think many of these companies are very interested in exploring whether remote agents make sense for their business — but we're yet to see any significant investment with respect to that."

Not only does Ontario offer some of the most advanced communications infrastructure in the world, its communications costs are 30 to 40 percent lower than the U.S., due mainly to a more competitive environment.

### Plenty of Room for Growth

Although there are always hard questions to answer regarding the availability of adequate facilities, Clark-Forster said Ontario has an abundance of commercial property available which is ideal for setting up new call centers.

"I think it is fair to say that there is real estate available to meet any client's demands," she said, adding that most of the call centers she sees coming into the province are utilizing existing structures and doing lease/hold improvements. "It's unusual to see a contact center do a design/build," she said. "In terms of new construction, I've seen maybe three or four new projects during my past 10 years of doing site selection work with clients."

Many of the call centers locating in the urban centers are utilizing office spaces vacated by the many dot com companies that went bust and left the

area in the 1990s, but meanwhile, in the suburban and rural areas, they're retrofitting old warehouses, factories and light assembly plants to make them into state of the art contact center and/or business process outsourcing facilities. Perhaps most importantly, real estate costs in Ontario "are on average about 15 percent less than they are in the U.S.," bringing yet another important economic advantage to the table.

But perhaps more important than the availability of adequate facilities is the fact that there are droves of graduates with appropriate training coming out of Ontario's many colleges and universities — enough to drive the future growth of the call center industry there for many years to come.

"I hear nothing but positive comments about our labor and our talent pool here in Ontario," Clark-Forster said. "That's what keeps bringing companies back to expand — and what keeps the new call centers rolling in. With access to our talented pool of labor, our US-based clients find they're able to ramp up very quickly — not only with the labor, but with all the resources they need. Thirdly, they find it very easy to do business in Ontario — it's quite seamless — and I think that's mainly due to our cultural similarities, our accent neutrality, and the fact that we're an easy commute to and from the U.S. Usually following their first year in business here, they're blown away by how much cheaper it is to do business in Ontario than it is compared to the U.S."

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# Top Five Advantages of e-Learning for the Contact Center

E-learning solutions, those ever-popular multimedia learning tools used for online training and education, are seeing increasing adoption in the contact center, as companies are discovering the advantages they offer for improving agent performance. These solutions, which often come bundled with other contact center applications, are used to deliver initial training to new hires in the training room as well as ongoing, "just-in-time" coaching to agents while they're on the contact center floor. With their ability to deliver short, multimedia training sessions just after an agent has finished a call, today's e-learning solutions are playing an increasingly valuable role in the contact center software ecosystem.

Before delving into the advantages of today's e-learning solutions, though, we must first differentiate between content and delivery. These are the two main elements of any e-learning solution. However, most e-learning solutions providers don't offer their own content. They provide the software needed for delivery, but typically work with third party providers of pre-packaged training programs, in addition to providing authoring tools which let companies develop their own custom training modules. For the most part, organizations are using pre-packaged Web-based content, sometimes blended with custom content, for initial training, and custom content when it's time to deliver just-in-time coaching. An organization can decide to go only with pre-packaged content, develop its own content, or do a combination of both.

Also essential to any e-learning solution are storage and testing. Obviously, you need a place to store your content - which is why most companies now building a "training library," which typically resides on a dedicated server for the purpose of delivering on-going, automated just-in-time training modules to agents. In addition, the content needs to be paired with some testing tools so you can test your agents and measure their improvement. The aforementioned authoring tools round-out the basic elements needed to complete an e-learning solution.

Now let's take a look at the advantages today's e-learning solutions bring to the contact center:

## Train Agents Faster, More Effectively

Without a doubt, this is a top advantage and the number one reason companies are increasingly adopting e-learning solutions for the contact center. Research has shown that e-learning solutions, when properly blended with one-on-one, personalized training, deliver initial agent training faster and more effectively than traditional methods. With interactive multimedia presentations and expertly crafted simulations being delivered right to their desktops in the training facility, new hires can roll through their training at their own pace while getting personalized training. Those who complete modules and pass follow-up quizzes at a faster pace can progress to new levels of training and get to the floor sooner, while slower learners can go through modules at their own pace. Testing is a snap, too, as tests and quizzes are delivered and graded automatically, plus scores can be immediately viewed by the supervisor. Through increased automation, training now requires much less supervision and moves along at a brisker pace.

But the more important functionality delivered by today's e-learning solutions is the just-in-time coaching — fast, targeted training that can be delivered to agent desktops and which results in better

trained agents. With this new capability, agents can get feedback, training and testing immediately after a call, while the training is still relevant. For example, once a supervisor identifies a problem, perhaps through call monitoring or speech analytics, he can take a portion of the recorded interaction, make a sound clip of it, annotate it, attach additional files (such as a test) and then send it to the agent. Because the agent gets this "coaching" right after the call, retention is improved — in other words it is more effective than if it was delivered the following day or week.

In addition, supervisors can send links to training modules which come from the initial training content (stored in the library), and have the agent re-take the module that corresponds with the call scenario that just took place. Some software requires the agent to "accept" the training before he or she can move on, and the supervisor can see the status on whether the agent has accepted or completed the training and/or testing. And thanks to the power of IP, these solutions now allow supervisors to deliver personalized training to each and every agent, regardless of location, which means remote agents get the same training as agents in the center.

Patrick Botz, global director of marketing for [Voice Print International](#), ([news - alert](#)) which offers e-learning as part of its suite of contact center solutions, said one of just-in-time coaching's biggest advan-

tages is that “you don’t have to take the agents off the floor for classroom training.”

“And, for the agents that are doing really well, and understand the products and promotions, you don’t have to train them,” he said. “Because, let’s face it, you could take everyone off the phone for classroom training, and half of the agents won’t get anything out of it, because they get it already. This way, you’re only sending the targeted training to the people who really need it.”

Connie Smith, chief evangelist for Envision, which offers e-learning with its comprehensive portfolio of contact center solutions, said the ability to deliver just in time coaching is really what distinguishes today’s e-learning solutions from those of a few years ago.

“When we talk about the advantages of e-learning, whether hosted or on-premise, it is the coaching piece that delivers real benefits,” she said. “I just read about a study done by the International Personnel Management Association which shows that training alone increases productivity by 22 percent. But if you combine that with coaching — such as the training that comes via the e-learning training clips — it increases productivity by 88 percent.”

### Deliver Custom Content

Today’s e-learning solutions are also more flexible in that they can be used to combine almost every type of content imaginable: Send an instant message telling an agent how to access certain information; send an audio clip of a customer interaction just gone awry and explain to the agent how to stay on track; send an audio clip of that perfect cross-sell; or send PowerPoint presentations to update agents on changes in company policy, the launch of new marketing campaigns, the introduction of new products or a sudden product recall. With today’s e-learning solutions, companies can notify their agents the minute a new product is released — so these systems are being

used for much more than just basic e-learning. Plus, with today’s advanced authoring tools, supervisors can quickly create customized “mash ups” of audio, video and text files which can be immediately delivered to agents as personalized training modules.

“One of the things that’s really great about today’s e-learning solutions is that they’re so easy to create, administer and manage,” Smith said. “And the content is so targeted, so specific, you can target it to address practically any need.”

“The really cool thing is that you can send an e-learning clip telling your agents where some information lives on your site,” Smith added. “And that information is always being updated. So, for example, let’s say someone has made a change in a policy — as long as that link is still good, the e-learning solution will take you to the new policy.”

Facilitating the ability to quickly and easily create multimedia presentations from a variety of disparate training files are e-learning content standards like SCORM (Sharable Content Object Reference Model), which enable all of the files in an e-learning library to be compatible with different software.

“We have a new release of our e-learning solution coming out on July 30, and one of our big initiatives with our developers and product management team was to make it SCORM compliant,” Botz said. “Basically it is a standard that lets all of the content be easily re-usable, and accessible, and interoperable with all the applications. So if a company goes to another e-learning vendor, all the material they created using our system is easily transferable to another software system.”

Obviously, there are a million different training programs for agents, all tailored for different market segments and industries, outbound and inbound and both — and companies need to choose wisely to make sure they deliver the best training content possible to meet their needs. The

hot thing today is simulation-based e-learning — software which lets agents interact with simulated “customers” in a completely natural way, just as if they’re on a real call. One advantage of these solutions is that they allow for complete and thorough training and testing of agents before they go live on the phones — thus sparing a company’s customers from being used as “guinea pigs” for new trainees. As the agents interact with these “simulated” customers, “problems” can suddenly arise, and the agent must try to navigate their way out of the situation. Interestingly, the training piece of these simulation-based solutions is achieved through “just-in-time” coaching that is delivered through the training software itself.

“By simulating actual customer situations the agent can feel free to ‘spread their wings’ and practice new skills without jeopardizing client relationships,” said Mark Brodsky, CEO and president of Ulysses Learning, a leading provider of contact center training solutions featuring state-of-the-art simulations. “A well designed simulation-based e-learning system will get you very close to a live customer experience. What’s more, the learner benefits from just-in-time coaching on their performance within the simulated environment. This is often more in-depth and specific than what is realistic in a fast paced call center environment.”

### Deliver Consistent Training

Another advantage of today’s e-learning solutions for the contact center is that they deliver consistent training to all agents. One reason traditional training methods get mixed results is because, let’s face it, not all instructors are created equal.

“Just as learners have different styles, so do instructors,” Brodsky explained. “In an instructor-led program, the quality of the program (or lack thereof) is largely determined by the quality of the instructor. E-learning takes this variable off the table which in turn leads to more consistent learning and knowledge



transfer across the business enterprise.”

Consistent delivery of training is particularly important for companies which have geographically dispersed centers. Without e-learning, you could have someone who is good at training agents in one location,

but have someone who is lousy at another, and end up with inconsistencies in agent skill levels. E-learning solves this problem by enabling companies to deliver consistent training to all agents, no matter where they're located. (Furthermore, software

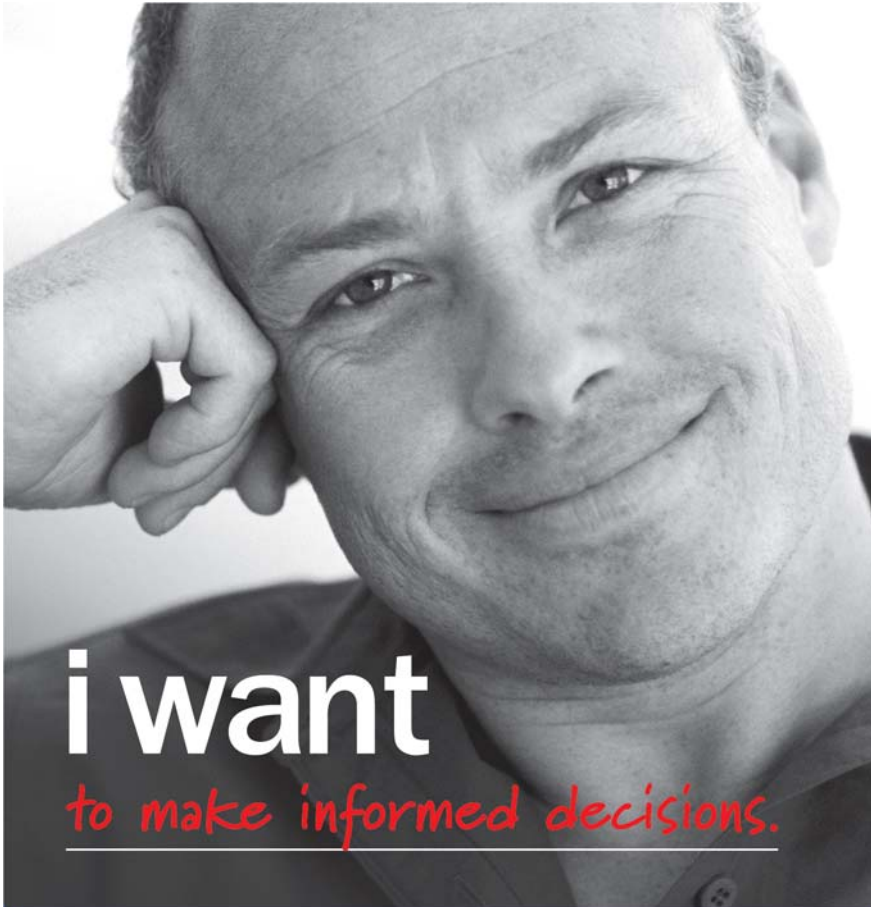
doesn't get tired the same way an instructor does when it's his last class of the week after a Thursday night binge!)

### Build Agent Loyalty Through Self-Empowerment

This is a huge advantage. To help keep agents happier and more engaged in their jobs, companies are increasingly allowing them to take control of their own performance improvement through solutions like e-learning. Allowing agents to learn at their own pace and re-train as they see fit gives them a feeling of empowerment — a sense of ownership over the contact center's overall operation. Letting agents learn at their pace removes the pressure associated with traditional training and thus makes agents more comfortable with learning and improving their own performance. Giving them access to the training library so they can self-train and use it to serve customers improves their performance, as they now have better command of the tools available to them and therefore can deliver a better customer experience.

“I used to be an agent many moons ago, and it's so much more complicated now,” Smith explained. “There's so much more to know. So by being able to feed the agents this targeted information, and by helping them get better at their skill gaps, they're more confident and they're more comfortable in their jobs, and that translates into higher retention rates. And the whole thing is, if you can keep your agents longer, it's a win-win situation because their performance is higher, and their customer service is better.”

Smith said recent research shows that companies which have implemented e-learning solutions, combined with traditional coaching methods, “are 50 percent more likely to have lower turnover, achieve 27 percent greater profitability, and have a 56 percent higher customer loyalty rating — because their agents are



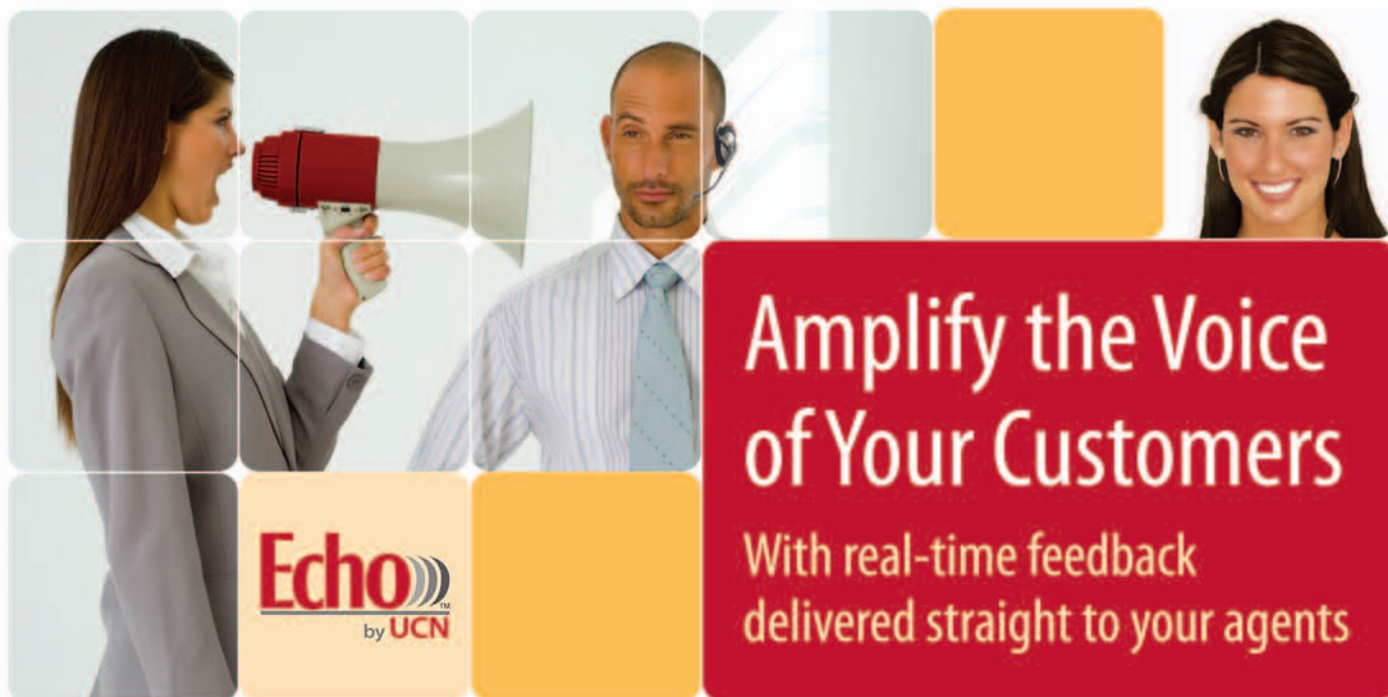
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### The Next Big Thing in Call Centers!, by Anita Rockwell & Dr. Jon Anton

This informative white paper will help you improve your performance analysis and caller recovery process.



knowledgeable, they're faster and better." She said agent performance has become a new area of focus for many companies "because these days everyone's talking about customer satisfaction — that's the big hot thing right now." As a result, companies are learning that "it's not just customer satisfaction, it's actually employee/cus-

tomor satisfaction."

Joel Goldenberg, VP of contact centers for NICE Systems, which delivers e-learning for the contact center through its NICE Coaching solution (part of its Nice SmartCenter platform), pointed out that the contact centers that are making the most use of e-learning for agent training are those that are focused on delivering

high quality service to top tier customers.

"Coaching tools help the call center improve the overall performance of the agent, which in turn affects the operational performance and the enterprise performance," he said. "And at the end of the day, a high performance contact center helps lead to loyal customers that will stay with the company longer."

Adding to their effectiveness is the fact that today's e-learning solutions have greater appeal with the younger generations now coming into the contact center industry.

"We've now got a generation that has grown up with the Internet and gaming," Brodsky said. "They are used to multi-tasking and very advanced simulations. To hold their interest, today's e-learning experience has to be on par with the rest of their world. The challenge is keeping them engaged and wanting to learn new skills as they advance in their careers. High quality e-learning design allows you to do just that."

### Build a More Powerful Contact Center Ecosystem

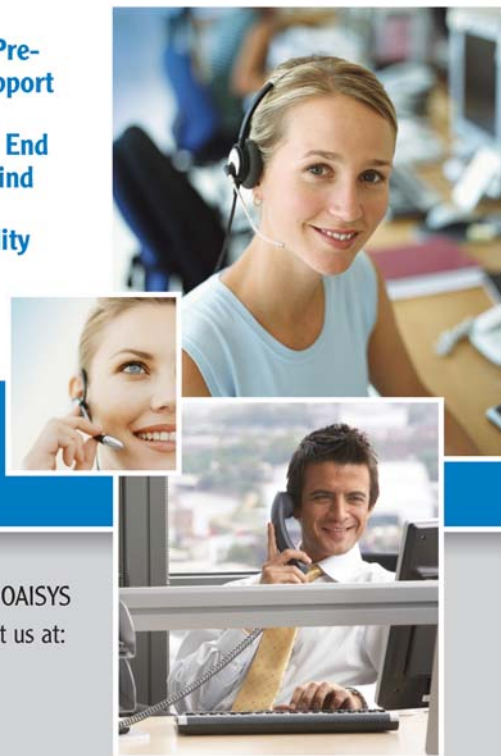
It should be noted that the value of any e-learning solution increases exponentially when it is working in concert with other pieces of software. Think of the previous example, which is perhaps the most common, where a contact center supervisors uses call monitoring and speech analytics to identify which agents need additional training and then send them custom training modules to help them overcome barriers to performance improvement. In addition to this capability, today's e-learning solutions can be integrated with a contact center's performance monitoring software, so that when certain metrics aren't being met by a particular agent (such as meeting a certain sales goal), training can be automatically sent to just that agent.

Botz said VPI's customers tend to make great use of the company's per-



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formance management software, which delivers a dashboard to each agent's desktop showing them performance metrics for the group and for the individual agent, based on business rules defined by the organization. He said when certain metrics aren't met, or a certain threshold has been exceeded, the system automatically sends the appropriate module to the agent's desktop, and the agent must take the module before moving on to other work.

"What our clients really like about this is, it tends to let the agents improve their performance in real time," Botz said. "And when you layer the e-learning on top of it, you get really dramatic improvement in agent performance. For example, one of our clients, 1-800-Flowers, which has 2,000 agents, is huge on e-learning, and they saw an ROI within 6 months. The e-learning really boosts it, because

all of a sudden, now you have agents who not only know where they are at all times, in terms of performance, and then if they fall below a certain metric, they know they're going to get customized training."

Also adding power to today's e-learning solutions is integration with the center's workforce management software. This type of integration is useful for scheduling slightly longer training sessions with agents. For example, if an agent is having a particular problem and needs re-training, a supervisor can schedule a training session using the center's workforce management solution, and the agent can take the agent during an "off-peak" period when call volume tends to be lower. Some systems are now even harnessing the power of the workforce management and performance management software to deliver training to agents automatically when traffic levels decrease.

## Conclusion

Although e-learning for the contact center offers many technical advantages in terms of training agents, it is no substitute for live, one-on-one, hands-on interaction with a contact center supervisor, coach or manager. Live, one-on-one interaction between supervisors and agents not only facilitates better learning, it also helps build clear lines of authority and respect, not to mention team spirit. Those interviewed for this article agreed that live coaching will always need to be blended with the technology to attain maximum results.

One last and final point that should not be overlooked is the value of thoroughly training your agents on basic customer service skills to serve as a foundation for whatever customized training you layer on top. Just-in-time coaching isn't a substitute for a lack of initial training using high quality content that assesses agent skill sets and teaches them "the basics" before going live on the phones.

"With respect to the best way to improve agent performance, without question, the area with the greatest opportunity for impact on call center performance is customer interaction skills; namely service and sales skills," Brodsky said. "And we're not just talking about service and sales tips and techniques but rather deep customer interaction skills that enable an agent to make good decisions during the call and have the ability to quickly and effectively take control of the call and navigate it to a successful conclusion for both the customer and the company. This is where expertly crafted simulation-based e-learning comes into play because this method of learning is among the best ways to learn these skills in a safe, simulated environment. It's even far superior to role playing or even attempting to learn these skills on the job practicing on real customers."

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### About Altitude

As a leading independent contact centre vendor, Altitude Software's deep expertise and industry know-how has helped customers around the globe deploy state-of-the-art contact centers based on the most recent and market proven technologies

### Altitude at a Glance

#### Providing superior solutions,

- ✓ in 60 countries,
- ✓ to 700 customers,
- ✓ 170,000 agent positions,
- ✓ from 15 office locations,
- ✓ since 1994.

### Our commitment to YOU!

Everything we do aims at delivering value to our customers business by offering:

#### Freedom of choice

- ✓ optimize investments, no infrastructure lock-in

#### Embrace change

- ✓ from ideas to business goals, change is easy

#### Peace of mind

- ✓ we support you every step of the way

### About Altitude uCI



**Altitude uCI is a next generation contact center suite that enables organizations of any size to deliver:**

- ✓ outstanding customer service
- ✓ increased performance
- ✓ cost effective management of high volumes of interactions.

The functionality of Altitude's modular suite of applications spans the full management of the interaction lifecycle including contact list management, interaction routing, agent workflow, monitoring and historical reporting for all media.

### Altitude uCI Value Proposition

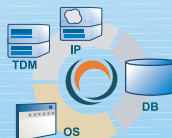
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Cacti contact center solutions enable organizations to improve efficiency, ensure compliance, automate processes and enhance customer service resulting in financial success. Cacti pioneered the open architecture server based quality assurance software platform. Cacti provides our growing customer base strong flexibility on an open platform using the existing server environment. This gives our customers flexibility, scalability and stability on a standard Windows 2003 platform without any proprietary components.

The return on investment is immediately realized and the customers experience all advantages of an open solution, while meeting their defined infrastructure standards and requirements. Additional advantages are apparent since our offerings are 90-100% software. Cacti realizes contact centers today are being asked to interact with customers via multiple mediums such as audio, fax, web, chat and e-mail. This gives companies competitive advantages in the marketplace, while increasing the complexity of managing performance, compliance, efficiency, retention, validation of information and the protection of company assets.

### RECORDING

#### Selective Recording

**ObserveCTI Enterprise Selective Recording** — Provides intelligent selective multimedia recording on a non-proprietary open server platform. Captures voice (analog, digital, VOIP), screen activities, data input, keystrokes, web interaction and e-mail. ObserveCTI resides on a standard Microsoft Windows 2003 server platform and includes other built-in options such as analytical reporting, screen recording, e-learning, chat, agent feedback and other agent interaction tools.

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**Cacti Enhanced Analytical Reporting** — Gives customers the ability to access and analyze quality assurance data from a completely different perspective. Customers can establish score cards, visual dashboards and identify key performance indicators from multiple systems such as Workforce Management, ACD Call Management Systems, etc. with a click of a mouse. All reports can be scheduled automatically and delivered directly to management.

### E-LEARNING

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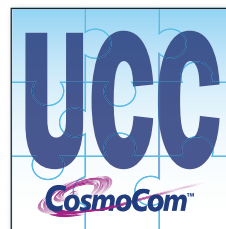
CosmoCom is the leader in IP-based contact center platforms for enterprises and service providers with the largest and most complex requirements, consolidating multiple locations, onshore, offshore, and home-shore agents, formal and informal agents, multiple communication channels, and multiple applications. Consolidation 2.0 means consolidating the many diverse contact center needs of the enterprise on a single platform. With Consolidation 2.0, the efficiency and cost reduction benefits of consolidation meet the unlimited flexibility of deployment that enterprises need today.

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# Autonomy etalk

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Autonomy etalk delivers a unified, centrally managed platform for its contact center solutions, helping global, multi-site organizations manage and understand their customer interactions. From call recording to real-time speech analytics, Autonomy etalk delivers tools that not only capture and manage valuable interactions, but make customer insight available to anyone, anywhere in the organization.

Autonomy etalk goes beyond traditional approaches to customer interaction management to enable the Intelligent Contact Center, giving organizations the ability to capture, analyze, and share the information that flows through the contact center. The Intelligent Contact Center relies on the solutions for multi-channel interaction analysis, real-time agent support, and contact center performance management to deliver better customer service, enhanced operational performance, and more effective business strategies.



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- Script Adherence
- Agent Evaluations
- Coaching and eLearning Tools
- Post-Call Customer Surveys

*“Even with [our] exceptional reputation for service, we are always striving to improve guest interaction. We’ve been thrilled with the increased focus on customer service that Autonomy etalk has enabled, helping to ensure that guest communications is exemplary.”*

- Tom Faust, vice president for sales and distribution for Omni Hotels

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# Improving Contact Center Performance While Lowering Costs



IEX® Corporation, a NICE Systems company, is a leading provider of feature-rich, scalable workforce and performance management solutions that enable contact centers to improve planning and scheduling, enhance performance and streamline tasks. Founded in 1988, IEX has a strong global market presence in over 50 countries with more than 900,000 agents at over 3,000 sites.

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## Strategic Planning

Long-term planning solutions delivered by IEX let you easily develop comprehensive strategic and financial plans. “What-if” analysis features give you the ability to quickly examine staffing, training and other operational alternatives. This information helps you fully discern the impact of business changes on your plans and requirements. A sound approach to strategic planning and analysis positions your contact center to meet its performance and financial goals.

## Agent Development

Agent development solutions offered by IEX improve employee performance by enhancing job proficiency skills and product knowledge. Available training programs let agents and other employees access instruction on topics such as computer keyboarding and transcription skills, ergonomic tips, IEX product features and more. Web-based delivery makes the solutions easy to deploy and allows employees to learn from the convenience of their workstations.

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When you invest in contact center technology from IEX, you get more than just a great product. You get a wealth of experience and a commitment to help you realize the benefits of your investment. Our solution architects understand your unique business challenges and use their broad experience to help you overcome them. With nearly 20 years experience helping contact centers establish best practices, we see things from your point of view.

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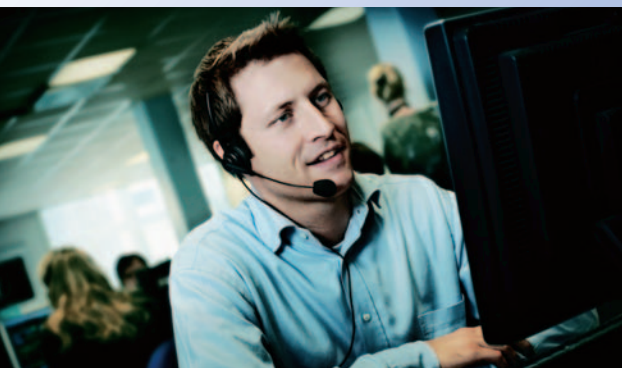
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# The 2007 Speech Technology Excellence Awards

Speech technologies are becoming so sophisticated that businesses are finding new applications for them practically every day. Thanks to advancements in the algorithms used to interpret speech, coupled with today's faster processors, we now have speech recognition systems in our cars and on our cell phones that can carry out simple voice commands, i.e., "call home;" speech-to-text solutions that let corporate executives have their computers take dictation for them instead of their secretaries; and voice recognition systems that are accurate enough to be used to grant people access to high security facilities.

Today's speech technologies are also having a significant impact on the call center. For example, today's IVR systems sport sophisticated speech engines that can ask callers open-ended questions, such as "How may I help you today?" and then intelligently direct the call to the appropriate agent within the center. Then there's the advent of speech analytics – software which "mines" call recordings for data which can be used to improve agent performance, boost customer satisfaction and gain new insights into customer behavior – data that organizations can use to drive important business decisions. Interestingly, as companies increasingly adopt these advanced solutions, the role of the call center is being redefined into that of a "business

intelligence center," or central "hub of intelligence" for the organization.

*Customer Interaction Solutions* magazine recognizes that speech technology is now a key differentiator for call centers (after all, we have been covering call center technology for 26 years now, and have witnessed the progression from primitive auto-dialers and recording systems to full CTI integration, to IP-PBXs with remote VoIP call center agents). Not only do call centers employing the best speech solutions have an edge in terms of delivering superior customer service, they also have an advantage in terms of being able to realize the operational efficiencies and cost savings that speech technologies can bring. Soon it will be the norm, rather

## SPEECH TECHNOLOGY



## EXCELLENCE AWARD™

than the exception, to find advanced speech technologies playing an important role at both the front-end and the back-end of any call center operation.

With new speech technology products for the call center constantly coming onto the market, it has become increasingly difficult to keep up with the latest trends in this rapidly growing field. That is why *Customer Interaction Solutions* launched the Speech Technology Excellence Awards, to find the best-of-the-best of these new products and pass our findings along to our readers. Following are the winners of the 2007 Speech Technology Excellence Awards.

### Congratulations to the winners!

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RightNow Technologies	RightNow Voice	<a href="http://www.rightnow.com">http://www.rightnow.com</a>
Syntellect	Syntellect Voice Platform	<a href="http://www.syntellect.com">http://www.syntellect.com</a>
Nexidia	Nexidia Language Assessor	<a href="http://www.nexidia.com">http://www.nexidia.com</a>
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By Tim Passios  
Director of Product Management  
Interactive Intelligence

# Recording for Quality Assurance

**Q: We're a teleservices company, and like many regulated businesses we're feeling more pressure to comply with guidelines that get stricter by the day. Any best practices you can fill us in on to improve our compliance program and recording processes?**

**A:** It sounds as if you have a good foundation with a compliance program and recording processes already in place. Yet as frequently as guidelines change, compliance requires constantly finding ways to better integrate your recording technology with your organization's business rules, scoring methods, and ability to improve agent performance through coaching and ongoing mentoring.

Here are four recording and quality assurance best practices that can help your business meet regulatory guidelines.

Training and mentoring. To initially train new agents (and enterprise employees), use recordings of "ideal" interactions that clearly meet compliance, followed by recordings of "less than ideal" interactions that contrast.

**"If agents have no idea when we're listening, they're more likely to internalize the right behavior and make compliance a habit."**

These barometers clearly demonstrate the right and wrong way to handle customer situations. Thereafter, ongoing mentoring lets you continually train employees on new and updated regulatory statutes.

Also to supplement training processes, post recorded files to an Intranet site or e-mail them directly to employees for anytime access and self-directed training. Supervisors should

additionally take advantage of real-time monitoring solutions now on the market to oversee live interactions and simultaneously conduct mentoring sessions. This approach lets a supervisor address bad habits while they're occurring and stop them immediately.

Assessing and coaching agents. The rules of thumb here are as much psychology as they are best practices:

- Determine and utilize the preferred method of learning for each agent, whether auditory, visual, or kinetic, in which a person learns via physical actions. Because compliance information is often complex, matching learning methods with an agent's personality type improves comprehension.
- Supplement real-time monitoring with reviews of recorded interactions. Recordings in this case can fill the blanks for supervisors who get pulled away from an interaction they're actively monitoring.
- Acquire an accurate statistical sample for regulatory adherence. The more agent-customer interactions a supervisor can review, the more accurate the sampling in judging an agent's performance.
- Assess performance on a regular basis to provide feedback and ensure that employees don't misinterpret compliance rulings. By evaluating a certain percentage of interactions every 2 weeks, for example, agents are more apt to show continuous improvement.
- Set recording rules and monitoring sessions to review interactions randomly. Or in the words of one savvy supervisor: "If agents have no idea when we're listening, they're more likely to internalize the right behavior and make compliance a habit."

Recording rules flexibility. The best protection against penalties naturally is to record all interactions and media types. At the least, however, your recording solution should let you configure rules-based processes for those interactions certain to face regulatory scrutiny, such as outbound campaigns to a particular state or province. Recording rules should also cover transaction-laden interactions routed to

queues such as Telemarketing and Order Processing & Fulfillment, plus those identified in customers' IVR selections, protected by HIPAA patient privacy requirements and so on.

Scoring recorded interactions. Scoring demonstrates good faith toward compliance. Your recording solution should therefore equip you to create scorecard templates that include a date and time stamp for scoring events, along with the name of the person performing the scoring. In the eyes of most compliance auditors, such measures indicate that your organization is making a concerted effort to achieve conformance, as do these best practices when designing a scorecard:

- Keep the scoring process objective, and thoroughly instruct all scorers on the purpose of each question.
- Word questions in a positive rather than negative context.
- Provide room for freeform comments, with at least one freeform question per subject area.
- Grade questions by weighting them according to their importance.
- Determine how to score Not Applicable (N/A) questions for unexpected items or activities that don't occur during an interaction, and how to handle escalated issues.
- Conduct regular scoring calibration sessions to maintain uniformity among persons who score and evaluate interactions.

With recordings increasingly serving as evidence in non-compliance lawsuits, proving 100% compliance must be the goal for any business. And the more attention you pay to your compliance program and recording practices, the less chance you'll get stuck with a 6-figure fine and tarnished business reputation.

*Tim Passios is Director of Product Marketing for Interactive Intelligence Inc. (news - alert) and has more than 16 years experience in the contact center industry. Interactive Intelligence is a leading provider of IP business communications software and services for the contact center and the enterprise, with more than 2,500 installations in nearly 70 countries. For more information, contact Interactive Intelligence at [info@iinin.com](mailto:info@iinin.com) or (317) 872-3000.*



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