

**TMC**

# CUSTOMER INTER@CTION *Solutions*

**26<sup>th</sup>**  
Year  
Anniversary Issue

July 2007 • Vol. 26/No. 2  
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#1 In CRM, Call Centers And Teleservices Since 1982™

## Premise or Hosted?

# “yes!”

to both

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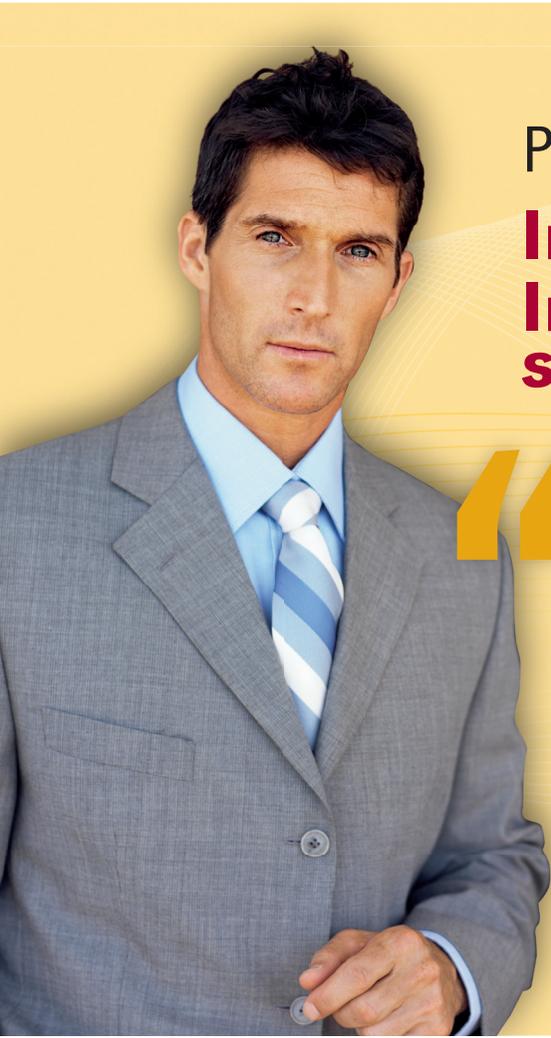
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**Call Center 2.0™**

September 10-12, 2007  
Los Angeles Convention Center  
Los Angeles, California  
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### Also In This Issue:

- Boardroom Report with NICE Systems
- CIS 26th Anniversary Issue
- Building and Managing Call Center Teams
- Call Center E-mail Response on the Decline
- CosmoCom: Virtual Contact Centers Setting a New Standard



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# CUSTOMER INTER@CTION *Solutions*

26<sup>th</sup>  
Year  
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July 2007 • Vol. 26/No. 1  
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#1 In CRM, Call Centers And Teleservices Since 1982™

The Executive Roundtable:

# New Trends In CRM

Leading Companies Speak Out:

- **Salesforce.com**
- **Envision**
- **Sage Software**
- **SAP**
- **Consona**
- **Aperio**

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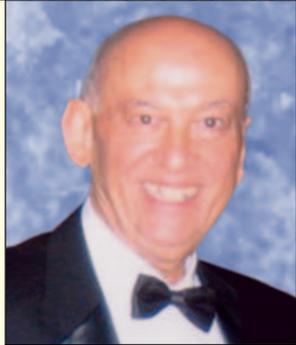


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By: Nadji Tehrani,  
Founder, Chairman & CEO, Editor-in-Chief,  
Technology Marketing Corporation

## OUR 26TH ANNIVERSARY A TIME FOR REFLECTION & LEARNING FROM MISTAKES OF THE PAST

Twenty-six years ago, this publication started as Telemarketing® magazine, a bi-monthly publication introduced in June/July of 1982.

As you may know, the industry was practically non-existent at that time and we literally had to dig for information, finding very little to write about. In fact, we nearly ran out of things to write by the second issue because the industry, as we know it today, did not exist at all. But, since we had taken the plunge, we were in a sink or swim situation and we simply had to make it happen if, for nothing else, the survival of the magazine and laying the foundation for what is now a trillion dollar industry encompassing not only the traditional inbound and outbound telemarketing, but also covering CRM, customer loyalty, fund-raising, credit collection, etc.

---

**We invited the top 100 CEOs who had significantly contributed to the growth and prosperity of our industry during the last 25 years to receive lifetime achievement awards for which they were as deserving as anybody. Frankly, the industry could not have grown as fast as it did without the help of the honorees of that 25th anniversary gala in New York City.**

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Back in 1982, our positioning statement which appeared as a tagline for Telemarketing® magazine was: "The magazine of electronic marketing and communications." It was our vision back then that marketing would be conducted electronically. Of

course, our vision was at first ridiculed by the people who had no vision — and even those people are now believers because what they couldn't see 25 years ago has now become a reality. Indeed, it is a lot easier to see a trend after it happened, as opposed to 25 years prior to it happening. Having said that, I must

admit that ignorance is an entrepreneur's best friend! Had I known back then that the industry did not exist and we could find nothing to write about, I probably would not have launched the magazine and only God knows when this industry would have taken off!

Along the way we launched the first conference and exhibition called Telemarketing and Business Telecommunications® (TBT). Marketing professionals from around the globe (literally from every continent and every progressive country) attended the conference, learned from our seminars and purchased the seminar cassette tapes to take back home and train other people in their own countries. In plain English, this magazine and our capable staff here at TMC were instrumental in pioneering and laying the foundation for this phenomenal new way of marketing.

In the mid 1980's, I called for the automation of the industry. Several visionary CEOs such as Gary Taylor, Steve Brubaker, Richard Brock, Jack Early, Joe Profelli, Steve and Sherry Idelman, Gary and Mary West, Robin Richards, Ted Schwartz, Ed Blank, Tom Cardella, Tim Searcy and many other outstanding individuals helped significantly to take the industry to the next level.

During our 25th anniversary celebration, which was held May 5, 2006, at the

Marriott Hotel in New York City, we invited the top 100 CEOs who had significantly contributed to the growth and prosperity of our industry during the last 25 years to receive lifetime achievement awards for which they were as deserving as anybody. Frankly, the industry could not have grown as fast as it did without the help of the honorees of that 25th anniversary gala in New York City.

As such, the industry continued to grow thanks to the support of the many visionaries some of whom were mentioned above. And the industry kept growing, very conservatively, at an average of 80-100% per year in the 1980's, 30-35% per year in the 1990's and even now after 25 years, the industry is still growing at a highly significant rate. As I indicated in the May 2007 editorial under the title "the industry is alive and well," some 42,000 net new jobs were created in the contact center/CRM centers in Q1 of 2007. Interestingly, only one call center went to India and by and large the majority of the growth took place in the United States. Please see Table 1 for specifics on where the jobs were created. (ALAN, please insert Table 1 from May 2007 issue)

As you will notice, amazingly, the growth of the industry has significantly accelerated in the last few years to a point which has gone far beyond the growth rate of the 1990's. Only a tremendous industry such as ours can create such phenomenal growth after nearly 26 years of existence. In fact, the job growth in the United States in Q1 of 2007 was precisely 39%. I know of no industry that has matched this growth after a quarter of a century! Obviously, we are very proud of the achievement of the many people who have been part of this unique and unusual success story.

**How the Industry Has Changed**

In the 1980's, which I call "the growing up period," the application of tele-marketing, which was the founding father of today's customer interaction/CRM centers, was limited to

outbound calling, prospecting, sales and sales support. Indeed, the growth of outbound was far exceeding the growth of inbound in the 1980's and this trend continued throughout the 1990's regulations came about, i.e., do not call and others. The outbound growth gradually slowed and in fact as we know it the business-to-consumer section of the industry was practically eliminated. On the other hand, since there never was any objection about the inbound, frankly, I cannot see any condition where there could be any problem with the inbound, because the consumer and/or the end user usually initiates the call based on their own needs. Around the turn of the 19th century the growth of the industry reversed so that now the inbound sector was outperforming the outbound sector in terms of growth. However, outbound sectors such as fund-raising, credit collection and the like are still viable businesses and they continue to grow at a very healthy pace.

**The Rapid Increase of Technological Advancements**

Contact center technology which began in the mid 1980's as primarily contact management software to be followed by the advent of predictive dialers and preview dialers and eventually automatic call recordings followed by speech technology, workforce management and optimization, analytics and eventually IP Contact Centers were instrumental in call center growth. This enabled worldwide contact centers to call anywhere at reasonable prices and also opened the door to what is now the home agents which is growing at an extremely fast pace. Our industry, which was extremely low-tech in the early 1980's, now has developed into extremely high-tech. We have always observed that the application of technology was lagging far behind that of new technology developments. Part of the reason was that the technology providers were uninterested or did not realize that marketing is also as important as technology. As a result, they continued to create better mousetraps only to find

**Executive Group Publisher**  
 Nadji Tehrani (ntehrani@tmcnet.com)

**Group Publisher**  
 Richard Tehrani (rtehrani@tmcnet.com)

**Editorial**  
 203-852-6800 (cispress@tmcnet.com)  
*Editorial Director*, Tracey E. Schelmetic  
*Associate Editor*, Patrick Barnard

**TMC™ Labs**  
 203-852-6800 (tmclabs@tmcnet.com)  
*Executive Technology Editor/CTO/VP*, Tom Keating

**Art**  
 203-852-6800 (cisart@tmcnet.com)  
*Creative Director*, Alan Urkawich  
*Graphic Designer*, Lisa A. Mellers

**Executive Officers:**  
 Nadji Tehrani, *Chairman and CEO*  
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**Circulation Director**, Shirley Russo (srusso@tmcnet.com)

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**Advertising Sales: 203-852-6800**

Karl Sundstrom, ext. 119 (ksundstrom@tmcnet.com)  
*Senior Advertising Director*  
 Eastern, Western, International

**Exhibit Sales: 203-852-6800**

*Global Events Account Directors*  
**Companies whose names begin with:**

**A-G or #s:** Maureen Gambino (mgambino@tmcnet.com)

**H-P:** Chris Waechter, ext. 108 (cwaechter@tmcnet.com)

**Q-Z:** Joe Fabiano, ext. 132 (jfabiano@tmcnet.com)

**Editorial Offices** are located at  
 One Technology Plaza, Norwalk, CT 06854 U.S.A.  
**Customer Service:** for all customer service matters, call 203-852-6800.

**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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One Technology Plaza,  
 Norwalk, CT 06854 U.S.A.  
 Fax#: 203-853-2845  
 Sales Dept. Fax#: 203-838-4070



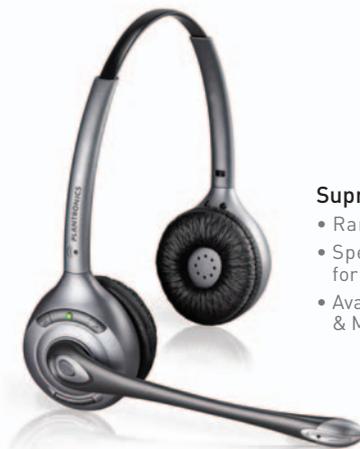


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out that the mouse died 15 or 20 years ago!! As facetious as this may sound, this is a reality among many technology providers which consider marketing more of an unnecessary nuisance as opposed to the most important part of any business, particularly the contact center business. The reason, in the 1980's the most effective way to generate sales leads was through outbound telemarketing and we all know that all sales begin with a sales lead. In other words, if there was no telemarketing back then, the only other way to generate leads would have been through highly inefficient and cost prohibitive direct mail which resulted at best in a half percent to 1 percent response. Later on the industry learned to combine direct mail with telemarketing and the synergy resulted in a 30% increase in the response rate and lead generation rate. Bottom line, the technology people who needed marketing the most were the ones

who were doing the least amount of marketing. Believe it or not, this horrendous mistake is still continuing to this date.

I am reminded of that famous 50 year old McGraw-Hill advertisement which included a man sitting on a chair and asking the sales person:  
 "I don't know who you are;  
 I don't know your company;  
 I don't know your product;  
 I don't know what your company stands for;  
 I don't know how you differentiate yourself;  
 I don't know how you position yourself;  
 I don't know the benefits of your product;  
 And now what is it that you are trying to sell me?"

In my opinion, the above outstanding ad is true today as it was 50 years ago. In plain English, this advertisement is

telling all vendors that if you don't market, you don't exist. If you don't exist, no one will buy your products.

Recently, the advent of online marketing has changed the paradigm: Mainly that if you are not on the first few pages of the leading search engines (preferably on page one or two or three), you really don't exist because customers today are more likely to go to Google and look for the proper keywords and if your company is non-existent on the appropriate keywords, your business is not going anywhere.

In the next issue, I will be writing about the demise of off-shoring and poor quality contact centers.

As always, I welcome your comments. Please e-mail 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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- 1995-2003  
 President / Founder,  
 Access Direct
- 2004  
 Inducted into Customer Interaction  
 Solutions Hall of Fame
- 1996-2005  
 Ten consecutive Quality Awards  
 from Customer Interaction Solutions

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### Five Tips To Improve Pipeline Management And Business Performance

By Spencer D. Chin, TMCnet Web Editor  
*Poor pipeline management manifests itself in inconsistent sales processes, the ability to get the correct information, low sales production and other issues. To circumvent these problems, businesses must have an effective pipeline management system in place, according to a white paper by Oracle titled, "Five Tips to Dramatically Improve Pipeline Management and Overall Business Performance." Read the full article at <http://www.tmcnet.com/759.1>*

### SAP Named CRM Leader In Five Forrester Reports

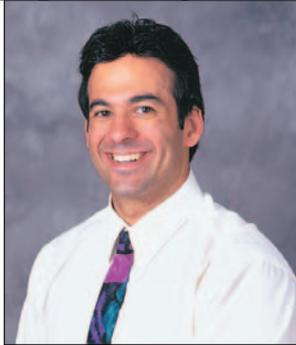
By David Sims, TMCnet Contributing Editor  
*CRM vendor SAP AG has announced that in the latest Forrester Research report, SAP AG was named a leader in all five enterprise customer relationship management (CRM)-relevant Forrester Wave reports issued in 2007. Read the full article at <http://www.tmcnet.com/760.1>*

### A VoIP Phone System: It's In Your Business' Best Interest

By Erik Linask, Associate Editor, Internet Telephony magazine  
*Perhaps you have an older key phone system that doesn't have a caller ID. That increases the likelihood of employees letting important calls go into voice mail. Perhaps it's a decade-old TDM phone system that doesn't support conferencing. An older phone system does not have the capacity to support company directories, or many of the other features that are simplified on a new IP-based phone system. Read the full article at <http://www.tmcnet.com/761.1>*

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

# Talkument: An Oaisys in the Desert

In my travels around the world to find the next big communications breakthrough, I recently traveled to Arizona, where, instead of hot, dry air, I was unlucky enough to get a dose of scorching desert heat and humidity.

But scorching digressions aside, as I drove, I ended up at a company called Oaisys. Yes, I did have a meeting planned in advance -- but the story seems more interesting if I just happened upon this Oaisys.

Now the company is commonly known for its excellent call center recording products and while this is an essential area of the contact center market I really didn't expect anything earth-shattering to be disclosed during the meeting.

So imagine my surprise when the company unveiled its Talkument strategy.

What is a Talkument, you ask? Well, it is the ultimate voice documentation appliance allowing companies to seamlessly capture and store telephone interactions. This nifty tool does for phone calls what e-mail does for letters and memos, in terms of retrieval and collaboration.

Account managers, project teams and people in order management can benefit from this productivity-boosting tool, which allows users to have access to voice documents which they can review, organize, comment on and share with others. The solution, which can be seamlessly integrated with existing IP telephony systems, is permissions-based, meaning that only the person who recorded the conversation has access to the file (of course, that person give others permission to access certain files, when needed).

One of Talkument's most useful features is that it allows you to "highlight" certain segments within a recording and cull them out so that you can send only the portion of the conversation you want be heard. For

example, if a project manager's boss wants to know specific details about a particular project, the project manager can select just the portions of a recorded meeting that are applicable, so his boss gets the short answers he needs, without having to sit and listen to the whole recording (or the portions that have no bearing on his decision).

In addition, you are able to annotate each segment (or the entire voice file) before forwarding it to others. In other words, you can add your own notes or comments to accompany the audio file so that recipients understand the context of what is being said - or so that supplemental information can be provided. This annotation feature also enables the user to accurately search for certain files - or open the files up to other users or groups so they have permission to retrieve them as well.

Another advantage of the software is its unique file management system. With Talkument, you can store the files in a number of different folders which can be customized and personalized, so you know exactly where to find specific files later.

This advanced software is particularly useful for people in order management, who can use it to check orders for accuracy. For example, if a customer complains about an order or says there was a discrepancy, you can go back and check the voice file to find out whether the error was on your end or theirs (even if the customer comes back a year later). In addition, you are able to forward a Talkument file to others with a specific time limit, allowing perhaps a 24-hour window for others to access it.

Talkument is an ideal collaboration tool, allowing corporations to become much

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more productive. There is no more guesswork, as the voice documents can be searched and listened to again and again, as needed. Furthermore, the voice file tagging and permissions built into the system allow the voice documents to be stored and collaborated on more efficiently. It is amazing we haven't had an analogous tool for voice communications up until now.

Making all of this possible is the Talkument appliance, which can currently be purchased in a few flavors: The small office version can work with 20 IP endpoints, while the standard Talkument appliance can handle 48 IP endpoints (Talkument supports up to two T-1 / PRI interfaces or 48 IP endpoints).

The only drawback to Talkument is that it results in companies storing more call data, as opposed to less. In financial services and other market segments, lawyers sometimes recommend purging as much data as feasible so it cannot be used against you.

In addition to Talkument, Oaisys makes several other call recording solutions, including Tracer, which gives businesses end-to-end documentation of their conversations as it automatically records, stores and organizes telephone conversations in a central, secure server; Auto Call Record, which records incoming, outgoing and intercom calls; and Street-View, a call recording and monitoring solution designed specifically for the automotive retail industry.

The company also offers a suite of call center solutions, including ACD Manager, which offers features such as event-based call management, intelligent look-ahead, ACD callbacks and callbacks for abandoned calls; Voice Assistant, an IVR solution which cuts the number of routine calls agents deal with in a given day; Call Router, which reduces the amount of time customers spend waiting on hold as they are passed through different departments; and TASKE Contact, a flexible contact center management solution which enables supervisors to manage their agents, set and meet service levels, and provide vital management information on call activity. Oaisys also offers NetPhone, a CTI solu-

tion which endows agents' desktop phones with presence capabilities and delivers screen pops on agent desktops, among other capabilities.

Talkument begins beta on July 16, 2007 and is expected to become generally available by October of this year. For an overview of the product, visit <http://www.oaisys.com/talkument/>.

So is this Oaisys product my "oasis" in the scorching Arizona desert? Yes. I can't say for sure whether the entire world will be standardized on the Talkument solution, but it seems the company has discovered a missing link in virtually every enterprise. Now that there is an option allowing corporations to use recorded conversations to boost productivity and efficiency, all that remains to be seen is what the adoption rate will be.

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

<http://www.tmcnet.com/843.1>

## Contactual Debuts Desktop Sharing

Contactual, ([news - alert](#)) provider of on-demand contact center solutions, recently announced its newest product: Contactual Desktop Sharing, which was designed to allow contact center agents to provide remote support to clients, helping improve the level of customer service, technical support and sales support. Agents can securely take control of the client's desktop to resolve support incidents, educate prospects, train customers and more. This integrated feature of the Contactual OnDemand Contact Center was added to help enrich the quality of customer interactions and eliminates the need to use a separate remote support application.

<http://www.contactual.com>

<http://www.tmcnet.com/844.1>

## Aspect Announces Availability Of Aspect Unified IP 6.5

Aspect Software, Inc. ([news - alert](#)) has announced the general availability of Aspect Unified IP 6.5, a session initiation protocol (SIP)-based voice over Internet protocol (VoIP) unified contact center solution that provides automatic call distribution (ACD), predictive dialing, voice portal capabilities, Internet contact, workflow management, multichannel recording and quality management to help organizations achieve their customer service, collections and sales and telemarketing business process goals. In addition, version 6.5 also includes enhanced capabilities such as embedded voice portal for advanced speech recognition and text-to-speech, advanced outbound list management and multitenancy and partitioning that supports a software as a service (SaaS) model.

<http://www.aspect.com>

<http://www.tmcnet.com/845.1>

## Sage Releases ACT! For Financial Professionals 9.0

Sage Software ([news - alert](#)) has announced ACT! by Sage for Financial Professionals 9.0, a contact and customer management solution that provides data management, activity tracking, reporting and sales productivity tools for financial advisors, brokerage firms and teams of

financial services professionals. ACT! for Financial Professionals centralizes prospect and client data in a single, secure database and helps individual advisors and teams capture and access key contact, account, investment and financial planning information, and assists with regulatory compliance tracking. Users can synchronize contact, calendar and to-do information with their Palm OS or Pocket PC devices. The purchase of ACT! for Financial Professionals also includes one year of ACT! Business Care maintenance and support. ACT! for Financial Professionals is the second ACT! industry solution following the launch of Sage Premium for Real Estate 9.0 in May 2006.

<http://www.sage.com>

<http://www.tmcnet.com/846.1>

## Launches Enhanced Predictive Analytics Platform

SPSS Inc. ([news - alert](#)) has unveiled new versions of its data mining, text mining, survey research and Predictive Enterprise Services products. The platform provides predictive analytics with improved integration, automation and data management, enabling organizations to more easily collect and use all available customer data, build predictive models and deliver customer behavior predictions across multiple channels. Among the benefits companies can derive are enhanced productivity across the enterprise, more accurate and consistent results and more confidence in decision making. SPSS predictive analytics applications and solutions are used to help improve critical business decisions focused on increasing customer acquisition, cross-selling, upselling and detecting and preventing fraud and risk in

industries such as finance, retail, telecommunications and the public sector.

<http://www.spss.com>

<http://www.tmcnet.com/847.1>

## ClickSoftware Delivers Business Analysis Tool

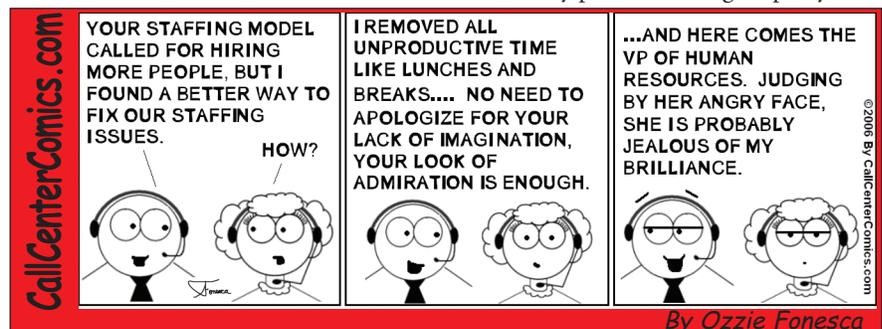
ClickSoftware Technologies, Inc. ([news - alert](#)) recently introduced a new version of its ClickAnalyze business analysis software. ClickAnalyze, part of the ClickSoftware ServiceOptimization Suite, now provides operational reports and a drill-down dashboard of key performance indicators (KPIs). Combining these reports and dashboard with ClickAnalyze's trend analysis capabilities can give service organizations a holistic view of everything from on-time arrivals to repair times, to tracking service level indicators like resource travel, workload, utilization and "in jeopardy" management. ClickSoftware's ClickAnalyze Suite was designed specifically for service businesses so they can reduce downtime, minimize costs and improve the accuracy of forecasting and planning.

<http://www.clicksoftware.com>

<http://www.tmcnet.com/848.1>

## BandTel And Paraxip Partner

BandTel, ([news - alert](#)) a provider of SIP trunking services, and Paraxip Technologies have announced that BandTel's SIP trunking solution is fully interoperable with Paraxip's Open Media Gateway Software. Paraxip offers transparent and customizable connectivity features between heterogeneous networks, which enable both legacy and IP contact center applications to leverage the BandTel SIP Trunking network. BandTel's network includes its N-Plus architecture, designed to solve the throughput and redundancy problems on high-capacity SIP-



based networks. By deploying a solution featuring BandTel and Paraxip, customers can seamlessly deploy a VoIP infrastructure and retain connections to the traditional telephone network or legacy PBXs without requiring any additional equipment.

[www.bandtel.com](http://www.bandtel.com) and [www.paraxip.com](http://www.paraxip.com)

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<http://www.tmcnet.com/849.1>

### Telerox Appoints New President

Telerox, ([news - alert](#)) a contact center outsourcer that specializes in customer care for the consumer packaged goods and healthcare industries, has announced the appointment of Linda Schellenger to president, effective immediately. Schellenger will oversee six interactive communications centers with 2,000 employees while managing strategic development, business planning and client program consultation. Schellenger recently served as senior VP of sales and marketing for Telerox, and will serve on the Telerox Board of Directors. Prior to joining the Telerox leadership team in 2006, Schellenger served as chief marketing officer for TCIM Services, Inc. <http://www.telerox.com>

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<http://www.tmcnet.com/850.1>

### SAP To Acquire Wicom

SAP AG ([news - alert](#)) recently announced the acquisition of Wicom Communications, a privately held provider of all-IP contact center and enterprise communications software based in Espoo, Finland. The acquisition is expected to be able to enable SAP to offer companies the ability to better integrate communications technologies and business systems so they can more effectively serve their customers, regardless of how they connect to the business; connecting functions such as customer service, marketing, finance and sales; and making sure that all customer-facing employees wherever they are located have access to the same relevant knowledge and data. Founded in 1999, Wicom delivers business benefits for approximately 200 contact centers and contact-intensive, multi-site enterprises in 18 countries. Financial terms of the transaction were not disclosed.

<http://www.sap.com>

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<http://www.tmcnet.com/851.1>

### Skype Available For Salesforce.com's AppExchange

Skype ([news - alert](#)) and [salesforce.com](http://salesforce.com) ([quote - news - alert](#)) recently announced the availability of a new version of Skype for Salesforce via [salesforce.com](http://salesforce.com)'s AppExchange. Skype for Salesforce was created to provide seamless Skype integration into Salesforce on-demand CRM applications and aims to improve workforce productivity and streamline customer and partner communication. Skype for Salesforce enables [salesforce.com](http://salesforce.com) customers to easily make and receive Skype calls or initiate text chats directly with other people whose Skype contact names and presence indicators can now be added manually or imported automatically into Salesforce. SkypeOut calls to non-Skype users' traditional phone numbers can also be initiated with a single click. Conference calls of up to 10 participants (including the host) can now be conducted using Skype for Salesforce and can accommodate any combination of Skype and non-Skype users. [www.skype.com](http://www.skype.com) and [www.salesforce.com](http://www.salesforce.com)

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[www.tmcnet.com/852.1](http://www.tmcnet.com/852.1)

### Acxiom To Be Acquired By Private Firms

Acxiom Corporation ([news - alert](#)) has announced that it has entered into a definitive agreement to be acquired by Silver Lake, an investment firm focused on large-scale investments in technology-driven growth industries, and ValueAct Capital, a large strategic block investment partnership. Silver Lake and ValueAct Capital will acquire 100 percent of the outstanding equity interests in Acxiom in an all-cash transaction valued at \$3 billion, including the assumption of approximately \$756 million of debt. Acxiom integrates data, services and technology to create and deliver customer and information management solutions for many of the largest companies in the world. The core components of Acxiom's solutions are customer data integration technology, data products, database services, IT outsourcing, consulting and analytics and privacy solutions.

<http://www.acxiom.com>

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<http://www.tmcnet.com/853.1>

### Amcat And IEX Sign Agreement

Amcat, ([news - alert](#)) a provider of customer interaction solutions, recently announced it has signed an agreement with IEX Corporation, ([news - alert](#)) a NICE Systems Ltd. Company, to join the company's Global Alliance Program. The partnership agreement means Amcat is promoting the IEX TotalView Workforce Management system as an interoperable extension of Amcat's Contact Center Suite inbound outbound customer interaction system. This combined offering is expected to give contact centers the tools to maximize return from their largest cost, labor. Both Amcat and IEX solutions work with inbound, outbound and blended contact centers of all sizes and share the characteristics of an "open" platform, making them flexible and easy to integrate with other applications.

[www.amcat.com](http://www.amcat.com) and [www.iex.com](http://www.iex.com)

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<http://www.tmcnet.com/854.1>

### Toshiba Inks Licensing Deal With OAISYS For ACD Solutions

Toshiba America Information Systems Inc., ([news - alert](#)) Telecommunication Systems Division, and OAISYS ([news - alert](#)) have announced they have signed a licensing agreement giving Toshiba exclusive global rights to the intellectual property and source codes of the OAISYS ACD product line. The agreement gives Toshiba the exclusive right to formally acquire the OAISYS ACD intellectual property. OAISYS products included in the agreement are: ACD (currently sold by Toshiba as Strata ACD), Voice Assistant, Net Phone, IVR and Call Router. All are compatible with Toshiba's family of Strata CIX IP business communications solutions. Toshiba will continue to partner with OAISYS for development and will continue to source the OAISYS voice recording products, including TRACER and the company's newly announced Talkument product. OAISYS will continue to develop and distribute its recording products to Toshiba and other vendors in the telecommunications industry.

<http://www.telecom.toshiba.com> and  
<http://www.oaisys.com>



By Patrick Barnard  
Associate Editor, Customer Inter@ction Solutions

# Our Video-enabled Future

In the short time I've been covering the call center industry I've heard a lot about the "fast approaching day" when agents will be able to interact with customers via two-way video. As a former outbound call center agent, I think this is a really cool idea — and I see a wide variety of ways that video communications could be used to enhance our daily routines in the not-too-distant future.

People in the call center industry have been exploring the idea of integrating Internet Protocol video in the contact center for years, and now many of the software and equipment makers, including CosmoCom, Verint, Genesys, Radvision and others are finally ready to make this prophecy a reality. Within the next few years, experts say, two-way video communications will be the new cutting edge way of doing business. The banking industry is already starting to deploy "virtual tellers" at branch offices (this in addition to completely branch-free, Internet-based "virtual banks") — while the retail industry is apparently gearing up to introduce "virtual store clerks." This "kiosk-based" form of video communications at bank and retail locations is the prelude to the much larger roll-out of fixed-line and mobile two-way video communications, which will ultimately bring this new form of communication into the privacy of our homes.

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**Within the next few years, experts say, two-way video communications will be the new cutting edge way of doing business.**

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Obviously, there are still hurdles to overcome before video communications becomes commonplace. For one thing, there's still the basic problem of not enough bandwidth on our last-mile networks (in fact, almost half of the U.S. is still on dial-up) — then there's the simple fact that most consumers do not have video phones or even video cameras and microphones connected to their PCs at home. Perhaps more importantly, there is still a question of how many people really *want* two-way video communications — whether actually *seeing* the person you are speaking with offers enough value to the consumer to make the cost of rolling out IP video communications worth it. But with the major wireless service providers of the world, working in concert with the handset makers, aggressively rolling out video capabilities on their next generation networks, we are no doubt getting closer to the day when two-way video communications will become a reality. As advanced new mobile devices (i.e., videophones) come onto the market, and con-

sumer demand for them increases, it only makes sense that the call center industry will follow suit.

For now it appears the banking industry is taking the lead in bringing this new technology in play. Numerous banks have already deployed "virtual tellers" at branch locations, and some banks are doing away with branches altogether and going to a pure "virtual banking" model (where all transactions are handled electronically via the Internet). For most of us, using a "virtual teller" at a branch office will not be too different from using an ATM, except you'll be able to communicate via video link with a "virtual teller" who is, in fact, a call center agent located miles away. In addition to handling basic transactions (such as cashing and depositing checks, which in many cases will be handled via pneumatic tube), these "virtual tellers" will be able to answer questions about your account, as well as cross-sell and upsell new products and services that the bank is offering. This new technology also brings tremendous advantages to the banks themselves, as they will be able to centralize and reduce staff, lower their real estate costs (as branches can be made much smaller) and deliver more consistent service to all customers.

Similarly, the retail industry is gearing up to introduce "video kiosks" where you'll be able to ask virtual store representatives questions about the products the store sells — maybe even take a "virtual tour" of the store before you go inside. Perhaps one day the "virtual clerk" at Home Depot will be able to tell you that, yes, they do have 12-inch Milwaukee Super Sawzall Blades in stock, that they're in aisle 12, and that they cost \$21.97 each before you spend 20 minutes wandering the aisles looking for something that might not even exist.

Farther down the road there's the potential for using IP video for a wide range of customer service and support operations, which people can access from their homes. For example, one day an agent in a tech support center will be able to "show" a consumer who just bought a new computer how to load some new software, or perhaps troubleshoot a set-up problem, right on the consumer's computer screen. The ability to "show" a consumer how to do something, in real time, rather than "tell" them over the phone will no doubt have powerful applications in the future.

I see tremendous potential for video in the contact center and I see plenty of applications for it that make sense. However, like all things in technology, this isn't going to happen overnight: the software and equipment makers are going to have to work on it slowly, in bits and pieces, and experiment with it as they go along. Still, I look forward to the day when I'll be able to get a truly "personalized" customer service experience with a call center agent who I can almost reach out and touch ...

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

By Penny Reynolds  
 Contributing Editor, Customer Inter@ction Solutions



# Building And Managing Call Center Teams

Most call center organizations are built around a team concept. Some call centers have teams that are nothing more than a group of individuals that happens to report to the same person, or perhaps does the same kind of work, but there is no real interaction and teamwork. Other call centers have empowered teams that work together as a cohesive group and take responsibility for the productivity and success of the unit.

There has been much research to show that self-directed work teams foster continuous improvement and result in better quality, productivity and customer service. People who work on functional teams are happier with their jobs than people who don't belong to a team. Team members feel better about their work because they are more involved in their jobs and see a link between their own accomplishments and those of the team and the organization.

As a manager, there is much you can do to make your team a success. Clearly defining the roles and responsibilities of the team will help ensure your team members know what is expected now and into the future. A team framework, with ever-increasing responsibilities, can provide career definition and help map out training and development for the team as a whole as well as individuals.

## Defining Roles And A Team Matrix

As you develop your team, it will be useful to "charter" it. A team charter will define the team's purpose and objectives. The more precisely you can define the purpose and objectives of the team, the faster your team members will understand where they're headed and how their roles fit into the bigger overall plan for the call center.

The team charter should answer three important questions:

- How much leadership will team members assume?
- What outside groups will the team need to coordinate?
- How will the team measure its effectiveness?

A key element in preliminary setup and ongoing team development is identifying the roles that team members and the leader will play. As a supervisor, you should define what responsibilities you will assume and which ones will be delegated to your team. Some of these roles and responsibilities can shift from you to the team as the team matures.

A matrix of team roles and responsibilities should be shared with everyone on the team so all members know what the mission and

goals of the team are as well as who is doing what now and into the future. You may want to define responsibilities for the current time, six months from now, twelve months from now and so on. The matrix should show not only current responsibilities, but what the team is preparing to do for the future. A sample team responsibilities matrix is shown in Table 1.

A team responsibilities matrix serves as a roadmap to see where your team has been, where it is now and where it is going. In addition to the matrix shown above, you will need to develop a matrix by individual that shows each team member's responsibilities. Clarifying roles helps your team members avoid misunderstandings and identifies new opportunities for development. It shows who is currently fully occupied and who may have room for additional responsibilities. It can also help you identify training and development opportunities as your team members assume more responsibilities. It can also help people outside the team determine the best contact points for their needs.

It is common for a team to get "off track" and find itself going in too many directions at once. When that happens, it's difficult for the team to focus on its primary goals and objectives, which can frustrate both you and your team members. If your team members get off track, it's your responsibility as leader to work with them to reexamine their focus areas.

To help the team stay focused, you may need to help team members prioritize. Have each member make a list of responsibilities and work together as a team to prioritize their efforts. You may still keep all the tasks on the list, but items may need to move up or down the list so the team can readjust its focus to its top priority - meeting customer needs and expectations.

You will also want to ensure that team members are pacing themselves appropriately. To foster development, you may have shifted responsibilities to team members too soon in the learning and development cycle. Assess the tasks of each role and make sure team members have the appropriate skills and knowledge, or they may be trying to do too much too soon.

Always keep a focus on the team process and how the team can do the work better and more efficiently. This may involve rethinking processes and procedures. Be flexible and learn to adapt to inevitable surprises and conflict that are part of every team effort.

*Penny Reynolds is a founding partner of The Call Center School, a company that provides a wide range of educational offerings for call center professionals. Penny is a popular industry speaker and is the author of numerous call center management books, including Call Center Staffing: The Complete, Practical Guide to Workforce Management and Call Center Supervision: The Complete Guide for Managing Frontline Staff. She can be reached at 615-812-8410 or by e-mail at penny.reynolds@thecallcenterschool.com.*

| Responsibility                       | Supervisor/<br>Team Manager | Team<br>Now | Team<br>6 Months | Team<br>12 Months |
|--------------------------------------|-----------------------------|-------------|------------------|-------------------|
| Customer liaison                     | X                           |             | X                |                   |
| Administer timesheets                |                             | X           |                  |                   |
| Vacation scheduling                  | X                           |             |                  |                   |
| Order supplies                       |                             | X           |                  |                   |
| Lead team meetings                   |                             | X           |                  |                   |
| Organize team training               | X                           |             |                  |                   |
| Monitor and score calls              | X                           |             | X                |                   |
| Monitor productivity                 | X                           | X           |                  |                   |
| Maintain team bulletin board/journal |                             | X           |                  |                   |
| Interview new job candidates         | X                           |             |                  | X                 |



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

# NICE Systems: Generating Insight From Interactions

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



Haim Shani

**NT:** I'd like to start out by having you tell us a little bit about your company and your type of business.

**HS:** NICE is the leading provider of solutions that generate insight for multimedia interactions. We are in

the business of voice, video, radio communication and voice over IP in a variety of industries. Our biggest market is the contact center business. However, about 20 percent of our business is also in the security area where we provide public safety and security personnel with solutions to capture voice to manage those interactions in a very effective manner. The position we hold in the contact center industry today is probably the widest and most comprehensive in the areas in which we operate.

We have recently launched the NICE Smart Center Solution, which incorporates, under one umbrella, the different solutions that we offer to the contact center industry - from compliance, quality management, workforce management, adaptive interaction analytics, coaching, customer feedback and performance management.

We believe these best-in-class technologies combined under the NICE SmartCenter umbrella and integrated within a unique, service-oriented architecture (SOA) gives us a compelling solution for addressing the different challenges of the contact center industry.

**NT:** What would you say is the greatest challenge for your company going forward?

**HS:** If I look at the challenges of the company, they are aligned with the challenges of the

contact center industry. I believe that today, we bring to market leading-edge technologies. The challenge with every new technology is how to make sure it is adapted in the most profitable way to help customers improve their business.

Managing a contact center in today's environment is not an easy task. Contact center executives need to strike a balance between optimizing people (who are very expensive resources), training costs, service-level agreements and the quality they need to provide to clients. On the other end, executives are challenged with ever-changing demands and ever-changing products in a competitive environment. Many contact center companies now manage multichannel contacts and employ multiskilled employees around the world who must upsell, cross-sell and answer both incoming and outbound calls.

This is a complex environment to manage, and new technologies can bring a lot of benefits. However, implementing technologies in a clever manner that will allow organizations to derive benefits from them is not an easy task. Our challenge, which is also our opportunity, is how to make sure that we offer solutions to accomplish this, and to capture the interactions.

We predict the volume of these interactions, and via our advanced adaptive analytics, we help our clients intuitively know how to make sales out of these interactions. We help organizations build key performance indicators (KPIs) that will allow them to optimize their resources within the different aspects of the operation. This is the challenge and also the biggest opportunity that lies ahead for our company and, we believe, the industry.

For example, we recently made an announcement of a deal with a very large GSM

operator. The major reason this company purchased our technology was to manage customer churn. Companies are starting to realize that in order to manage churn, they must more efficiently and effectively manage interactions with the customer via the contact center.

This is a big revolution. Businesses are now looking at the contact center as a strategic place that can affect revenue in a significant manner. This GSM operator has implemented NICE Perform, our flagship technology, with advanced analytics. Now, implementing it is a very sophisticated task, but the provider absolutely requires these services. They need to analyze and understand specific work flows. They need to take the contact center to a different level of complexity within the organization. As I said, this is a challenge, but obviously this is also an opportunity. That is where we are focusing as we speak.

**NT:** I think that is a great area to focus on. If you have been reading my recent editorials, I have always said companies live or die from repeat business and repeat business comes from customer satisfaction. If you don't watch what is going on and you don't take care of every need of the customer, they are not likely to come back.

**HS:** When you have 100,000 customers calling you every day, you need to understand what issues you have with them - what opportunities exist, which customers are at risk and why. Without our technologies, this is very, very difficult to understand and know what type of proactive action you need to take, how to forecast your demand, understand your customer's requirements and make sure that you put the right people in the right place in the contact center. That's a big step forward. We believe that with our technology, we can make a signifi-

cant impact on the industry. That's where we are heading. Of course, this is challenging, but we love challenges.

**NT: What do you perceive to be the greatest need of our industry? What can we do, as the leading publication of the industry for 25 years, to make things better?**

**HS:** I would say that if you look at the industry in terms of greatest challenges, it's probably how to move back-office types of operations into the forefront of the customer-focused operation on the business side of the enterprise. That is still a challenge. Some companies have gone a long way, but there is still a long way to go for the rest of the industry.

**NT: What would you say are the greatest developments in your company?**

**HS:** I would split these developments into three areas. There is the technology side, the service side and the customer reach side. I will start with the last one. Over the last few years, we have built a global approach and a global footprint that, in our industry, we believe is quite unique. We now have global customers. We have operations in basically every important part of the world. For companies that would like a standard approach, standard SLA and a standard focus, we provide it. This is very important. So, customers that have their business partially outsourced to India or the Philippines, that want to do business in a similar way with us, both in Japan, in Asia in general, in the UK and in the U.S., we have built a global footprint that is probably unmatched by any of our competitors. So, these developments are on the operational side, which is important because though technology is important, it is not just about technology.

The second important area is the service part. We understand that in order for customers to effectively use the technology, it is no longer enough to just physically install the system, do a one- or two-day training session and go home. Customers expect much more than that. They expect us to understand their needs and their requirements for the system before they even make a decision on any technology. They expect us to understand their needs and to assist them in the extra implementation and to follow up in the later stages. As a result, we have significantly upgraded the capability of our service organization, adding people and disciplines that are more from the CRM side. We have added people from IBM with experience in how to take IP solutions into the enterprise. We are now focusing them

in the contact center industry because of the reasons that I have described. So, I would say that this is another important development, and we continue to do this as we speak. We are adding people with domain expertise, people who understand the contact center industry and develop around that ability to help our customers better implement the technology.

The first part, of course, is the technology side. As I mentioned, we have recently launched the NICE SmartCenter offering. NICE SmartCenter is an innovative solution that brings an unprecedented level of openness to the contact center industry. To the best of our knowledge, NICE is the first company to bring a solution based on service-oriented architecture (SOA) principles to the contact center market. Basing our solution on SOA principles allows us to maintain the best-in-class status of individual components while helping our customers focus on 'smart' integrations. That means customers can protect and maximize their technology investments. In other words, customers get back the right to choose what they want and need. With SOA, we are not creating a closed suite. Instead, we are creating a web of services that are integration points between the NICE SmartCenter applications. With this approach, each of the NICE SmartCenter components can develop at their own pace.

**NT: You acquired IEX and Performix in 2006. How are these doing? Are these blending well with the rest of your organization? Are you happy with the progress?**

**HS:** Yes, we are extremely happy with the progress. If you look at our financial advancement in 2006 and you see the outstanding performance of the company, obviously this is a combination of organic growth, but also a very, very successful integration of the acquired companies.

From a strategic perspective, I would say that the combination of IEX, Performix and NICE technology puts us in a situation where we have best of breed in every category of our business. This is a good situation to be in. I can refer to some of our competitors. At least one of them has just decided to give up and basically leave the market. And, the other one had to pay an unbelievable amount of money just to be able to try and compete with us. So, from a strategic prospective, the breadth of our technology solutions is best of breed, which is a good situation. This is the result of the acquisitions that we have made and of course our own internal development.

**NT: You mentioned you are involved in video. How do you think or what do you think is the future of video in the contact center and/or in enterprise in general?**

**HS:** With people having more and more bandwidth in the home, we believe that video communication is another means of communication that the contact center will eventually embrace. It has been tested and people have talked about it for quite some time. For the more lucrative type of transactions, we will see it more and more. But it is not there yet. For transactions about a specific statement, for example, I am not sure that video will be used. But for consenting types of activity, whether it's medical, pleasure or financial, where the interaction is much longer than 30 seconds, there is a potential benefit of video. It's going to take a few more years, but I believe that contact centers will be able to provide video communication for a high-end type of transactions.

**NT: Next question, what is your vision of the future of contact centers? What are the trends in your opinion and also where do you think we are going to be in the next five years? Also, are you happy with the industry growth at this moment?**

**HS:** The world today is becoming competitive to a point which is unbelievable and was unheard of a few years ago. In this microenvironment, organizations hardly ever physically see customers anymore. Customers communicate with the business via the Web or telephone. Very little communication is done in-person. Therefore, the strategic importance of the contact center is probably going to grow more and more.

Over the next five years, I believe that the importance of the customer interactions is going to grow. On one hand, there will be more and more spending on automating the interaction. On the other hand, an opposite direction on everything that creates a venue, where there is an ability to spend time with the customer and to spend what he wants, sell him more, get more of his time and, of course, budget. So, we will see kind of two different trends, almost going in the opposite direction. Automating the simple interactions and making much more of those communications that can place value.

**NT: Are you involved in home agents or developing technology for home agents or host it solution deliveries?**

**HS:** Yes, we are involved in both areas. Our technology is a critical element in the

home agent operation. With voice over IP, I would say from a strategic point of view, if you are looking at agents that work from home, understanding the context of what they are doing is much more complex than if they are sitting on the same floor as you are, and you can look over their shoulders.

So, managing and optimizing the scheduling of agents that work from home is probably more complex than all the agents that are just around you. This is one element. The other part is how to coach home agents, record their interactions and improve the service quality. So, home agents is a very important trend that we can help implement much more effectively with our technology.

**NT: What would you say NICE's core competency?**

**HS:** Our core competency is a combination of technological expertise in a variety of fields. If you look at the different disciplines that are active today within NICE, we have very advanced applications (compliance, QM, WFM, adaptive interaction analytics, coaching, customer feedback and PM). We have developers and architects that are expert in networking, telecommunications and IP. We have experts in storage management. We have experts in algorithm and artificial intelligence using speech processing and speech recognition, and even in some cases advanced hardware design. If you look within NICE, you will find many of the same core competencies that you find within companies like Oracle and SAP. We have expertise in developing networking tools that you could find in companies like Cisco. And within the company, people with expertise in algorithms and artificial intelligence like the type you would find in labs in IBM or other companies. We have the experience to understand the needs of the contact center industry, and combine all these expertise into one working system.

**NT: And what would you say then is the positioning statement of your company?**

**HS:** We are the clear leader in several markets in generating insight from customer interactions or other business owned security related interactions. That's where we are today.

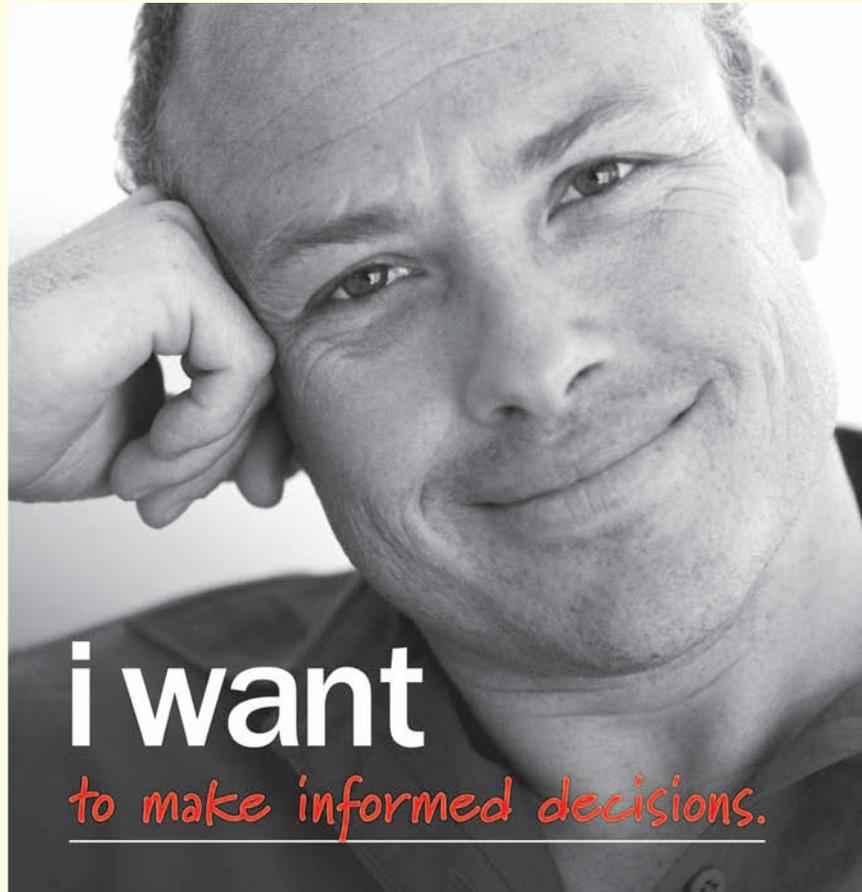
**NT: How would you differentiate your company from the competition or others?**

**HS:** We are probably the only supplier of best-of-breed solutions that have a clear direction without any doubt about the

company's financial, strategic or technology direction. It is clear and I, of course, refer to some of our competitors that now need to make tough decisions about which platform will be there, which will not be there, how to integrate and so on. We are beyond all that. We have already moved to the next step, which is best of breed technology, an open architecture backed by a wealth of services and a holistic solution under the NICE SmartCenter umbrella.

That's a big difference. If I am a customer who needs to make a decision today on what to buy, I would say that we are the only one with a clear direction, a clear team that has been working together for many years now, who knows its direction and knows the industry, so that's a big differentiation.

**NT: Thank you very, very much sir. I really appreciated your time.**



**i want**  
*to make informed decisions.*

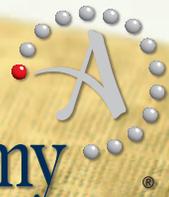
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# NetOp On Demand Facilitates Fast and Accurate Tech Support

By **Tonya Hottmann**  
Head of Marketing for the Americas, NetOp

Providing timely, efficient and cost-effective technical support for all users is one of the challenges many organizations face today. Remote control tools, which allow remote access to or control over another computer, are a natural choice for transferring files, running applications and resolving critical technical issues.

There are numerous advantages to having a help desk solution that can remotely support customers. Resolution of problems is faster and more accurate and this means increased customer satisfaction and customer loyalty, as well as improved productivity and efficiency leading to cost savings.

Typically a support incident involves a lengthy and complex diagnostic process and the majority of time is spent trying to understand what the customer problem is. This can take hours or even days of e-mails and phone sessions. With remote support, the time spent understanding the customer's problems is cut down dramatically, as the help desk employee can see the exact error message, find the relevant configuration information, and guide the customer to the correct resolution. The customer's problem can be resolved in one single interactive session.



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**NetOp On Demand is an Internet-based remote control solution that doesn't require pre-installed software and doesn't leave a footprint.**

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Normally, remote control help desk solutions require the customer's computer to have software pre-installed and running in order for someone to gain access. In many situations, however, a help desk center may provide support to thousands of customers, making it financially and operationally infeasible to install traditional remote software clients on all customer computers.

The answer is an on demand remote software solution. [NetOp \(news - alert\)](#) On Demand provides a way for customers to



get expert technical support anytime, anywhere. NetOp On Demand is an Internet-based remote control solution that doesn't require pre-installed software and doesn't leave a footprint. When a customer calls the help desk center, the help desk representative issues a service ticket. The customer is guided to a web site to download an executable file. After the file is downloaded, the help desk representative takes control over the computer and resolves the customer issue. When the session ends, the help desk representative disconnects and the application deletes itself without leaving a footprint. Most importantly, NetOp On Demand is secure. It doesn't use third party servers to route traffic and offers 256-bit AES encryption, securing all sessions from eavesdropping.

Key features of NetOp On Demand include:

- No pre-installed software is needed
- Operational in seconds
- Doesn't leave a footprint
- 256-bit AES encryption, securing all sessions
- Easy to use - no training is required
- Firewall friendly
- Chat and file transfer for sending updates, drivers, etc.
- Security roles to control allowed session actions
- Extensive event logging for session tracking and invoicing
- Communication over TCP using HTTP tunneling at port 80

NetOp On Demand makes it easy to diagnose and resolve issues, but most importantly, its design means that it does this in a way that is secure, under the end user's control, fast, and scalable. Furthermore it doesn't require end users to install time-consuming or undesired software, and because it is part of the NetOp Remote Control product range, it comes with a track record of secure remote control, completing all your remote control needs.

To learn more about this powerful remote control solution, visit <http://www.netop.com>.

## Tech Support Company Using NetOp's On Demand to Assist Doctors across Denmark

By Patrick Barnard, Associate Editor

The old adage "show, don't tell" has never been more relevant than in today's Web 2.0-driven world. When it comes to computer technology, users don't want to spend a lot of time trying to figure out what a technical support professional means when they try to walk them through a complex procedure or troubleshoot a problem via phone or e-mail. Furthermore, many computer users have a difficult time putting into to words what they are encountering, thus requiring a tech support person to "guess" what the problem is.

Eliminating this often frustrating situation is NetOp's On Demand — remote access software which lets help desk experts "tunnel" into a user's computer and take control of it for the purpose of providing fast and efficient technical support. The software lets a tech support expert take control of the desktop on a user's Windows-based PC and diagnose and/or fix a problem "hands-on," thus reducing downtime and increasing employee productivity.

One tech support provider which has seen tremendous success with this product is Lægernes EDB Central A/S, which provides support services to doctors across Denmark. With NetOp's On Demand, the company's help desk experts are able to provide fast and efficient support to doctors and medical assistants who use their computers to complete routine administrative tasks, such as checking electronic records, updating patient journals and writing prescriptions.

Prior to adopting the solution, Lægernes EDB Central had to provide tech support the old fashioned way:

"When doctors phoned, we had to try and imagine what their screens looked

like so that we could identify the problem that they were facing," explained Per Winther, the company's general manager, in a testimonial. "If we couldn't, we'd have to drive out to visit them, sometimes as far as 200 km away. In other situations, we would have to deliver a file and often couldn't send it in an e-mail, so we'd have to burn it on a CD and send it by post."

Winther said the solution delivered an immediate ROI: "Since using NetOp On Demand, we are almost saving the equivalent to one month's salary for a technician, and our technicians are driving about 5000-6000 km less per year," he said.

Interestingly, Lægernes EDB Central has discovered that the product leads to fewer repeat requests for support. That's because when an agent takes over the mouse and keyboard functions on a user's computer, the user can sit and watch, step-by-step, how the agent resolved the problem. Through this "show, don't tell" process, the user often ends up memorizing the process for resolving the problem and is then able to do it on their own.

Perhaps most importantly, NetOp On Demand doesn't use third-party servers to route traffic, and thus ensures that sensitive patient information is protected from unauthorized access. Sessions can be encrypted using up to 256-bit AES encryption, 256-bit SHA HMAC's integrity check, and 2048-bits Diffie-Hellman key exchange.

"NetOp On Demand has enabled us to improve our customer service tremendously," Winther said. "This product makes us more professional because we can respond quickly and effectively to service requests."

# The IP Contact Center Technology Pioneer Awards

Customer Interaction Solutions realizes that technology is the key to the success of any call center, as we have been editorially covering call center technology for 25 years. We also realize that with new products and new categories of products in the call center space, it can be strenuous and difficult for our readers to keep up with the latest and greatest products and services. This is why we launched the IP Contact Center Technology Pioneer Awards, so we can highlight for readers the best of the best in this emergent technology that is saving call centers all over the world a great deal of time, effort and capital. We've chosen as winners the products with the most admirable feature sets and the best track records of dramatically improving the operations of today's call centers.

Each company that submitted for this award was required to complete a questionnaire detailing its target market, its product's unique or distinctive features, its competitors and, of course, a list of customer references of organizations that have deployed the solution.

Following is the full list of IP Contact Center Pioneer Award winners. To all of the recipients, congratulations.

— Tracey Schelmetic

## Altitude Software

<http://www.altitude.com>

### Altitude IP Contact Center

Altitude ([news](#) - [alert](#)) IP Contact Center is a complete contact center suite, based on SIP, which includes flexible inbound and powerful outbound dialing algorithms, call classification, unified supervising, universal queuing and built-in business routing.

## Amcat

<http://www.amcat.com>

### Amcat Enterprise Interactions

Amcat Enterprise ([news](#) - [alert](#))

Interactions drives business revenue by delivering on a true "contact center without boundaries" model. Compared to traditional call centers, the next-generation model eliminates traditional boundaries found in most contact centers and gives users abilities to optimize customer traffic, enable the use of true anywhere/anytime resources and increase per-contact revenue. Amcat Enterprise Interaction leverages a direct path to IP, which enables rich media usage, provides for enterprisewide first-party call control and builds on existing contact center investments through hybrid and pure VoIP configurations.

## Arcosoft, Inc.

<http://www.vonalink.com>

### VONaLink TeamRecord

([news](#) - [alert](#)) VONaLink is call recording

and productivity software designed to work with Voice over Internet (VoIP) phone systems. With traditional phone systems, companies recorded calls using an analog system and, in a corporate environment, were limited to expensive and proprietary products from the phone company. With the latest VoIP systems built on open, standard protocols, VONaLink software delivers features that were, until recently, cost-prohibitive.

## Aspect Software

<http://www.aspect.com>

### Aspect Unified IP

Aspect ([news](#) - [alert](#)) Unified IP incorporates an ACD, voice portal, quality management and recording, a predictive dialer and Internet contact. It also provides unified reporting, routing and administration functionality and hosted capabilities with multitenancy while running on the customer's transport of choice. These transport options include open-source IP-PBX solutions such as the Asterisk Business Edition package offered by Aspect Software at significantly less than the cost of traditional IP-PBX, closed-source IP-PBX offered by companies like Cisco, Avaya and Nortel, any session initiation protocol (SIP) 2.0-compliant PBX and traditional voice telephony.

## Autonomy etalk

<http://www.etalink.com>

### Qfiniti Observe

Qfiniti Observe, Autonomy etalk's ([news](#) - [alert](#)) call and desktop recording product, enables organizations to record interactions for regulatory compliance, risk management and quality monitoring. Qfiniti Observe supports call recording on a pure VoIP or TDM-IP hybrid network. VoIP logging is performed by network "sniffing," the interception of traffic passing over a digital network, or the use of a SPAN port to mirror or copy traffic sent to a destination port. Autonomy etalk also supports call recording for remote agents using VoIP phones that connect to the organization's existing network.

## Cisco Systems

<http://www.cisco.com>

### Cisco Agent Desktop (CAD)

Cisco ([quote](#) - [news](#) - [alert](#)) Agent Desktop keeps agents productive and enforces best prac-



tices by automating transaction workflows, enabling team collaboration and unifying agent productivity tools in a services-oriented architecture. Cisco Agent Desktop integrates call information (CTI), call control, screen pop, third-party applications, Web services, e-mail, agent dashboards and alerts, presence and chat tools, soft phone, phone books, agent schedules (WFM), task automation and training into a common, easy-to-navigate interface that eliminates keystrokes, minimizes the number of applications an agent must touch to complete a transaction, and provides agents with a common view of the customer.

## Cistera Networks Inc.

### Cistera Convergence Server v1.7

<http://www.cisteraexperience.com>

Based on open standards and a server technology foundation, the Cistera ([news](#) - [alert](#)) Convergence Server enables customers to create a robust and scalable environment that is flexible enough to adapt to their changing needs over time. The CCS platform scales up to support organizations with thousands of users and scales down for offices with fewer than one hundred users, making it a viable alternative for a broad range of organizations.

## Citrix Online

<http://www.citrixonline.com>

### Citrix GoToAssist 8.0

([news](#) - [alert](#)) GoToAssist is a remote assistance solution designed for contact centers and outsourcers, consulting and IT professionals to instantly help customers, anytime and anywhere. Now in its eighth generation, GoToAssist is a managed service offering that provides ease-of-use, quality of service, availability, security and capability. With its suite of new features, including enhanced collaboration functionality, system administrator access, manager silent monitoring and annotation tools, GoToAssist 8.0 can help transform remote support into competitive advantage.

## CosmoCom

<http://www.cosmocom.com>

### CosmoCall Universe 5

([news](#) - [alert](#)) CosmoCall Universe (CCU) 5 is the fifth generation of the company's IP-based contact center technology. CCU was

designed to leverage emerging IP-based convergence to unify customer communications across all channels, including voice, video, e-mail and Web sessions, across all locations, and across all knowledge workers in the enterprise. CosmoCall Universe 5 expands on its roots, introducing a number of new tools that simplify contact center operations and provide enhancements to messaging infrastructure, call flow, reporting and security.

#### Intervoice

<http://www.intervoice.com>

#### Intervoice IP Contact Center (IPCC)

The Intervoice (news - alert) IP Contact Center is a new approach to routing and responding to customer inquiries. It combines the capabilities of self-service applications software with live agent assistance to provide companies with improved flexibility when responding to customers. The system intelligently routes any type of customer contact - phone calls, e-mail, Web chat, voice messages, and fax - in a consistent manner on a single system. It is a system of choice for mission-critical call centers over legacy ACD, IVR and CTI systems.

#### KNOVA Software

<http://www.knova.com>

#### KNOVA 7

KNOVA 7 (news - alert) is the latest version of a suite of Intelligent Customer Experience applications designed to reduce service costs, increase revenues and improve customer satisfaction. Built on a next-generation search and knowledge management platform, KNOVA 7 applications include KNOVA Contact Center, KNOVA Self-Service, KNOVA Forums, KNOVA Field Service, KNOVA Guided Selling and KNOVA Knowledge Desk.

#### Mitel

<http://www.mitel.com>

#### Mitel Customer Interaction Solutions

The Mitel (news - alert) Customer Interaction Solutions set is a two-tiered offering that encompasses the Contact Center Enterprise Edition and Contact Center Business Edition. The new offering allows organizations of any size the flexibility to implement a contact center solution for their unique service requirements. The Enterprise Edition supports all forms of communication including voice, e-mail, Web chat and fax. The solution combines robust communications platforms, automatic call distribution and a modular suite of Web-based applications for streamlining contact center management and enabling advanced multimedia customer transactions.

#### NICE Systems

<http://www.nice.com>

#### NICE VoIP Solutions

With NICE's (news - alert) unified-software-only approach to VoIP recording, along

with advanced applications for quality monitoring, liability and interactions analytics, the contact center can expand advanced capabilities to all branches and remote locations and improve overall business performance. The result is increased agent productivity, seamless business continuity, mission-critical reliability and IT investment protection.

#### Notel

<http://www.nortel.com>

#### Nortel IP Contact Centers

Nortel's (news - alert) IP Contact Centers give call centers the power, flexibility and geographic independence by using their IP network to support agents and managers almost anywhere, allowing organizations to use open, standard interfaces between software components of the contact center. Nortel's Contact Center Solutions enable personnel to work from virtually anywhere with an IP-based Thin Client Agent Desktop. With Smart Client Technology from Microsoft, client applications are always up to date. This allows clients to load "new from the server" each time the application is run, ensuring the thin client can be maintained on the server and the changes are in effect with the next sign-on.

#### Plantronics

<http://www.plantronics.com>

#### Plantronics VistaTM M22 Amplifier with SupraPlus Wideband

(news - alert) Ideal for VoIP users, the Vista M22 amplifier delivers precise levels of listening comfort, hearing protection and audio performance. The Vista M22 includes Clearline audio to improve call quality in any environment, especially wideband VoIP. The amplifier includes near-universal compatibility with single and multi-line telephones, as well as ergonomically designed volume, headset/handset and mute controls. The Quick Disconnect feature between the amplifier and headset allows users to move away from their phones without removing their headsets or disconnecting the call.

#### Toshiba America Information Systems Inc.

<http://www.telecom.toshiba.com>

#### Strata ACD IP Call Center Solution

Toshiba's (news - alert) Strata ACD is an IP call center solution designed for small to medium-sized enterprises or larger corporate users with multiple sites. Compatible with Toshiba's Strata CIX IP family of business communication solutions, which range from a few to hundreds of ports, and larger with multiple systems networked together, the Strata ACD provides an IP call center solution that can be customized to meet the needs of each enterprise.

#### Transera Communications

<http://www.transerainc.com>

#### Seratel

(news - alert) Seratel, delivered as a service,

enables organizations to globalize, diversify and grow call center operations to deliver exceptional customer care with no infrastructure investment required. With Seratel, organizations of any size can rapidly deploy a feature-rich call center with agents located anywhere in the world, including in-house, outsourced, remote, branch offices or at home - a browser, a phone and an Internet connection is all that agents require.

#### UCN, Inc.

<http://www.ucn.net>

#### InContact/WFM

(news - alert) InContact Workforce

Management Software (WFM) helps companies manage workforce scheduling, forecast demand, report real-time adherence, and simulate, analyze and optimize staffing in the call center. Companies can use the simulation module to predict employee occupancy, service levels, abandon rates and queue times, and use a break/lunch optimization wizard to improve staffing efficiency. Call centers can offer employees a Web and a phone interface to review their schedules, report in sick or late, set up their availability and preferred schedule, request time off and swap shifts with other agents.

#### Witness Systems

<http://www.witness.com>

#### Impact 360 IP Recording

(news - alert) Impact 360 IP Recording is a proven, reliable system for capturing, indexing and retrieving customer/caller interactions in IP, traditional and mixed telephony environments. It captures 100 percent of interactions and provides the performance organizations need to meet their IP recording requirements. Impact 360 IP Recording supports occasional recording on a single channel and around-the-clock recording in high-volume, multi-site environments with equal reliability and resiliency. Full integration with a wide range of VoIP systems (including Avaya, Cisco, and Nortel) and the new session-initiated protocol (SIP) enables it to capture additional information such as call date, duration, call ID and more, right out of the box.

#### Zeacom, Inc.

<http://www.zeacom.com>

#### Zeacom Communications Center v4 SP2

Zeacom (news - alert) ContactCenter is a scalable contact center solution that offers high-end functionality at an affordable price. Zeacom ContactCenter dynamically reacts to caller demands and organizes incoming calls based on parameters set by users. Whether they arrive by telephone, e-mail or the Web, contacts can be managed and reported on in a single centralized environment. Using its sophisticated CTI-based routing features, callers can be directed to the right agent every time.

# Executive Roundtable: Where is CRM Headed?

W

Where is the CRM software market headed? Will hosted solutions one day surpass on-premise solutions in terms of market share? Will we see even more small and medium sized businesses making use of CRM solutions? Will there be further consolidation in the CRM arena? Is the term CRM still relevant?

To find out the answers to these questions and more, Customer Interaction Solutions recently interviewed executives from six of the top CRM software vendors: Al Falcione, Director of Product Marketing, [Salesforce.com \(quote - news - alert\)](#); Tom Aiello, Vice President of Worldwide Sales & Marketing, [Envision Telephony \(news - alert\)](#); Larry Ritter, Vice President of Product Management, [Sage CRM Solutions \(news - alert\)](#); Bob Stutz, Senior Vice President and General Manager, [SAP CRM Strategy \(news - alert\)](#); Pete Strom, General Manager, CRM, Consona; and William (Duffy) Mich, Chairman and CEO, [Aperio Technologies \(news - alert\)](#). Selected responses to our questions appear in this Q&A, which has been

**Users are looking at CRM as more than just a tool, but as a source of information that will help them make good business decisions.**

fashioned to represent a roundtable discussion:

## 1. How do today's CRM implementations differ from those of seven years ago?

Bob Stutz:

For starters, CRM is no longer viewed as existing solely within the realm of the IT department, but has now expanded into all business areas. While CRM implementations in 2000 may have been spearheaded by the CIO for the purpose of cutting IT costs, today's implementations are embraced throughout the C-suite as a catalyst for business growth. As a result, CRM implementations are tightly aligned with the overall business strategy and focused on

realizing business value, rather than meeting singular metrics.

William (Duffy) Mich:

Today's CRM implementations are more powerful and faster than seven years ago. They collect a lot more data at a faster rate. But that doesn't necessarily mean they are more effective. Many companies erroneously believe that new technology automatically results in better CRM. In fact, the way businesses identify and manage their customer relationship processes — including the ability to analyze and predict customer behavior — plays a much more prominent role in addressing customer needs than technology.

## 2. How do these differences open the possibility of using CRM to new and different companies in terms of size and vertical market?

Tom Aiello:

Smaller companies can take advantage of analytics offered in CRM systems to understand why their customers are calling and then to take action to improve their customers experiences faster than their competition. Small to midsized companies can take advantage of Web-based applications to share valuable information across their enterprise anytime, anywhere, creating a more intelligent organization. With hosted solutions, they can leverage the power of CRM solutions that in the past only larger companies had access to.

William (Duffy) Mich:

As technology becomes commoditized, smaller-sized businesses will be able to affordably leverage CRM solutions, particularly those which are comfortable in implementing self-help Web-based services. This will allow companies in previously untapped vertical markets to improve their CRM capabilities. In addition, smaller companies, particularly those that do not possess the internal skill set required to manage CRM sys-

tems, will rely more and more on outsourced providers to manage their CRM needs.

## 3. What sort of changes or shifting paradigms are you seeing in today's CRM solutions?

Larry Ritter:

Recent research from analyst firm IDC shows that companies are beginning to move into a new phase of CRM evolution — what is being called the “decision” phase. Users are looking at CRM as more than just a tool, but as a source of information that will help them make good business decisions. These forward-thinking businesses are utilizing their CRM systems in a strategic manner to change processes in order to attract, service and retain customers. Providers of CRM solutions are being tasked with the challenge of meeting these needs with advanced analytics, flexibility and accessibility of information to allow users to retrieve and utilize the proper customer information instantly, providing customers with a seamless service experience.

Bob Stutz:

Business leaders have realized that internal efficiency alone is not enough to guarantee market differentiation and competitive edge. Success is no longer determined by price and product alone, but also by well-designed sales channels and service processes. Realizing this, organizations now measure CRM implementations beyond the ability to effectively run marketing campaigns or operate efficient call centers. In the last five years, we've seen that effective vendor solutions offer a holistic approach to CRM and recognize that customer experience is not limited to the front office. To energize new growth, organizations need to excel across and beyond customer touch points, which cannot be achieved with the point solutions on the market. This requires comprehensive, highly integrated applications that support end-to-end business processes.

## 4. Do you think the issue of “licensed versus hosted” will ever be settled? Or will it become a moot point?

Larry Ritter:



Licensed and hosted solutions do not necessarily need to be viewed in opposition to one another. We see the two deployment options as part of the increasing trend towards customizing the best CRM deployment for each specific business. For some companies, the lower cost and quick deployment benefits of a hosted solution may be best for their current environment. On the other hand, companies that need their CRM to do more — perhaps the business requires comprehensive customizations or extensive integration with ERP (Enterprise Resource Planning) and other systems — would be better served by purchasing an on-premises, licensed system. Still other companies may be more comfortable with the cost of an on-demand system initially, but may need to migrate to an on-premises solution as their business further develops.

Bob Stutz:

Different deployment models have their advantages and disadvantages. It really comes down to customer needs and business goals. On-demand became popular from a simple sales-enablement perspective. For a VP of sales, on-demand is a perfect solution to bypass IT and get an easy-to-use SFA (Sales Force Automation) tool up and running quickly. But pure on-demand solutions are limited in scope and hit a ceiling in delivering value. There's definitely a tipping point for customers where on-demand

doesn't make sense and they need an on-premise solution.

#### 5. Are there still untapped markets for CRM solutions?

Al Falcione:

We think that there is significant opportunity for small companies, large companies, and vertical solutions. Small companies have really just started adopting CRM solutions. Our on-demand CRM offering makes it easy for them to get up and running quickly without the traditional hassles of software. Large companies have tried — and many failed — with implementing CRM software, however they are now beginning to realize the benefits of on-demand and we see a lot of potential. In terms of vertical solutions, we've already seen incredible success in the financial services industry - and there are many other verticals that are great opportunities for on-demand CRM.

Pete Strom:

There are still many smaller and medium sized companies that aren't currently using a CRM system so there are opportunities there. Additionally, there are still many international markets where CRM is relatively new and there is a lot of room for growth. From a functional standpoint, we really believe there is a void in the market for CRM solutions that have strong Business Process Management (BPM) capabilities, in essence, marrying the management of customer data

and customer-facing processes. Additionally, we believe that most CRM solutions don't have strong Service Resolution Management (SRM) functionality and we see this as the critical next step in extending the traditional boundaries of CRM.

#### 6. What organizational departments are not using CRM now but might actually benefit from it?

Pete Strom:

We see value for departments like operations, product management, accounting, R&D and other departments. When you think about it there is a lot of value in non-traditional departments leveraging CRM. For example, the account management and accounting departments may want to segment the customer base and vary their communication method around late payments, depending on the value of the customer (for example VIP customers getting a personalized reminder versus a generic letter). Or the R&D group may want to work closely with account management and product management groups on identifying, prioritizing and following-up on enhancement requests from customers that were tracked in a CRM system. There are many other ways CRM could be leveraged in a non-traditional way.

7. How can vendors help CRM become even easier to administer? Many companies shy away from CRM because they're afraid

their IT people will need special degrees just to administer and troubleshoot it.

Larry Ritter:

By providing companies with options such as codeless development environments, CRM vendors can simplify the process for modifying an application and provide a level of consistency, which allows for easier IT management. This type of environment also cuts the ongoing expenses of maintenance and continued customization by allowing companies to easily configure a solution which meets their unique business requirements. However, many systems still require the help of a partner company in order to perform complex integrations or customizations. In this case, the best assistance that vendor companies can provide is an extensive partner network which will allow customers to select from local partners that have a vested interest in serving their business needs.

8. What has simplified CRM integration with other organizational systems?

William (Duffy) Mich:

Advanced ETL (Extract, Transform and Load) technologies have been a huge asset for efficiently processing customer information. It wasn't long ago that nearly 90 percent of all CRM activity was spent on collecting data. That left very little room for analytics, which are the real value in CRM deployments. Now, through ETL technologies, the time and resources spent on collecting and cleansing data have been reduced to 40 percent, leaving about 60 percent for analytics.

Al Falcione:

Recently we announced Salesforce SOA, which will deliver SOA as a service, heralding the end of complex and expensive software-based SOA solutions for intelligent Web services integration. Salesforce SOA will run on salesforce.com's on-demand platform, removing the cost and complexity associated with deploying and managing infrastructure.

Tom Aiello:

New XML-based languages have enabled CRM integration to become easier.

9. Do you think the term "Customer Relationship Management" is still relevant? If not, what term works better?

Tom Aiello:

Customer experience might be a better term. Customer experience more fully describes a customer's experience with the entire enterprise — how people, process and technology work together to support customer expectations. New technologies will support analysis and sharing of information critical to support customers' experience. As more and more data is collected, new

solutions will become available, such as data security, to ensure that customer trust and confidence remain part of the experience. Better understanding of customer service delivery will also provide new opportunities for technology to support corporate demand to increase revenue, reduce costs and optimize performance.



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William (Duffy) Mich:

There is nothing intrinsically wrong with the term. By definition, that's what businesses intend to do: manage their relationships with customers. But in practice, many businesses are relying too much on the data gathering engine and less on the intelligence aspect of CRM, specifically identifying, evaluating and acting on customer propensities. The technology can actually drive providers farther from their customers. But it's the analytics that ultimately brings the two groups together.

**10. How do you see the CRM marketplace shifting in the years to come? Will we see consolidation like we're seeing in the workforce optimization market?**

William (Duffy) Mich:

We're likely to see solutions that offer close to real-time decisioning and customer resolution. These may include intelligent call routing that far surpasses what's currently

available through IVR technology. Service oriented architectures will enable businesses to link together previously disparate operating systems and networks — like billing, inventory and their enterprise phone network — to provide customized decisioning and resolution on the fly and in real-time.

Al Falcione:

The only consolidation that is happening among CRM software companies is with those that have missed to the mark when it comes to on-demand — look at Siebel. SaaS and the on-demand model is the future of software — this will be the biggest trend of 2007 and beyond. Issues of integration, security, reliability, scalability and performance that are inherent in traditional software are virtually solved with SaaS, and IT departments can focus on the challenges of innovation, not infrastructure.

So there you have it: In a basic sense, CRM is still about collecting and storing

information about your customers — but today, more than ever, it about how you use that information to make good business decisions. As a result, today's solutions are putting a stronger emphasis on the ability to analyze the data in a wide variety of ways so that specific problems — or trends in customer behavior- can be quickly identified and addressed. Although CRM solutions are becoming more sophisticated in this regard, one thing remains the same: CRM software is not a “cure-all,” it is simply a tool which can help you arrive at faster, more efficient business processes, which in turn leads to higher customer satisfaction. But as we've learned so many times in the past, there is no substitute for knowing your business and knowing your customers.

*TMC will be publishing the complete interviews on a vendor-by-vendor basis on TMCnet (<http://www.tmcnet.com>).*

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# Call Center E-mail Response On The Decline

Traditional call centers have long been a staple of the point of contact for the customer. Historically, these centers were viewed as cost centers for the company as their only purpose was to keep the customer happy and that was not directly related to revenues. While this view is misguided, it still formed the basis for the traditional call center and, in some industries, this erroneous view still thrives.

However, for a majority of companies, times most certainly have changed and while consumers as a whole still prefer to call a company and speak to a live representative, e-mail is becoming a more popular communication choice than in the past. However, unless these companies take a more customer-centric approach to this communication channel, they may have fewer customers burning up any of their channels.

Hornstein Associates ([news - alert](http://www.hornsteinassociates.com)) (<http://www.hornsteinassociates.com>) studies the responsiveness of organizations across multiple industries. In the firm's annual e-mail responsiveness survey, results indicated a steady decline in the customer service response rates since 2002. In 2007, only 33

percent of companies responded to e-mails sent to customer service within 24 hours, a decrease of almost half from a high of 63

**The percentage of companies that responded to e-mails within 24 hours years declined significantly over the years as shown here:**

|                  |                  |
|------------------|------------------|
| 2002: 63 percent | 2005: 42 percent |
| 2003: 59 percent | 2006: 42 percent |
| 2004: 37 percent | 2007: 33 percent |

percent in 2002.

According to ICMI's 2007 Quality Monitoring Report, more than three quarters, or 77.7 percent, of call centers handle

customer e-mail transactions, with only about two thirds, or 64 percent, actually monitoring e-mail contacts.

The use of the Web has also increased over the past several years and customers are increasingly using this portal for communicating with companies. As a result, many companies are making this communication channel available to their customers. The good news is that these companies are also

**In 2007, only 33 percent of companies responded to e-mails sent to customer service within 24 hours, a decrease of almost half from a high of 63 percent in 2002.**

monitoring them for performance.

Since ICMI's 2004 study, the use of Web chat as a contact channel - and the monitoring of chat transactions — have both increased. According to the 2007 study, 12.8 percent of this year's respondents indicated that their center handles chat sessions, compared to only 8.7 percent three years ago. Although only 54.5 percent of these organizations monitored this channel in 2004, 70.3 percent are now monitoring this channel. However, only 27.4 percent of centers that offer Web self-service options take the time to monitor customers' self-service interactions.

Self-service is a great option to afford customers - after all, we as a society are demanding it. However, our demand for customer service continues to increase as well and companies that fail to recognize this will quickly lose customers to those companies that do. Monitoring all communication channels does require time and money, but it is well-spent when customers are happy. After all, happy customers are loyal customers.





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# IP, Virtual And Consolidated: The New Standard for Contact Center Technology

With customer service excellence emerging as a core strategy for businesses worldwide, contact center decision makers are now under pressure to increase customer satisfaction and reduce costs at the same time, all while managing complex day-to-day operations.

One of the most effective ways to further all of these challenging and sometimes conflicting objectives — service improvement, cost reduction and operational streamlining — is through the deployment of a virtual contact center.

A virtual contact center is a contact center in which the agents are located in multiple locations, but managed and utilized as a single entity. With one logical center across many locations, staffing resources are used to their maximum efficiency. Since calls are shared across the entire pool of agents rather than across geographically specific ones, the traffic is more evenly divided, moderating the workload for all agents. Busy signals and wait times are reduced, which not only raises customer satisfaction, but also decreases the caller negativity that can wear down even the best agents.

## Skills-based Routing

In a virtual contact center, experts are available to any caller who needs them through location-independent, skills-based routing. Since calls are routed to the right person regardless of location, fewer calls have to be escalated and more inquiries are converted to orders.

Because it allows agents to work in the location of their choice and even at home, the virtual contact center model increases the pool of available agents, reduces recruitment costs and improves employee retention and satisfaction, thus reducing training costs and improving customer service.

Virtual also means flexible. Mergers, spin-offs, reorganizations and redeployments are rarely painful. But they are far less painful and costly on an enterprise's contact centers when they are virtual, making the technology resources location-independent.

Virtualization also supports and reduces risks associated with the major trend to offshore outsourcing of agents. While the cost reduction opportunity of offshore outsourcing is significant, vital concerns remain about loss of control, operational complexity and quality of service. Creating virtual contact centers mitigates these risks, because it enables managers to retain complete operational visibility and control of activity across the globe via easy-to-use, Web-based administrative and reporting tools. It also allows seamless global call routing so that callers can reach the most cost-effective and appropriately skilled agent wherever in the world that agent may be.

## The IP Advantage

Because IP networks are inherently virtual, virtualization is more cost-effective and easier to justify as a capital investment with the deployment of an IP-based solution. As enterprises deploy their own high performance IP networks, the IP advantage increases. And there are other benefits to this inherently virtual technology. New generation software-based platforms don't need CTI middleware to integrate with the IT environment, and unify all communication channels in a single platform.

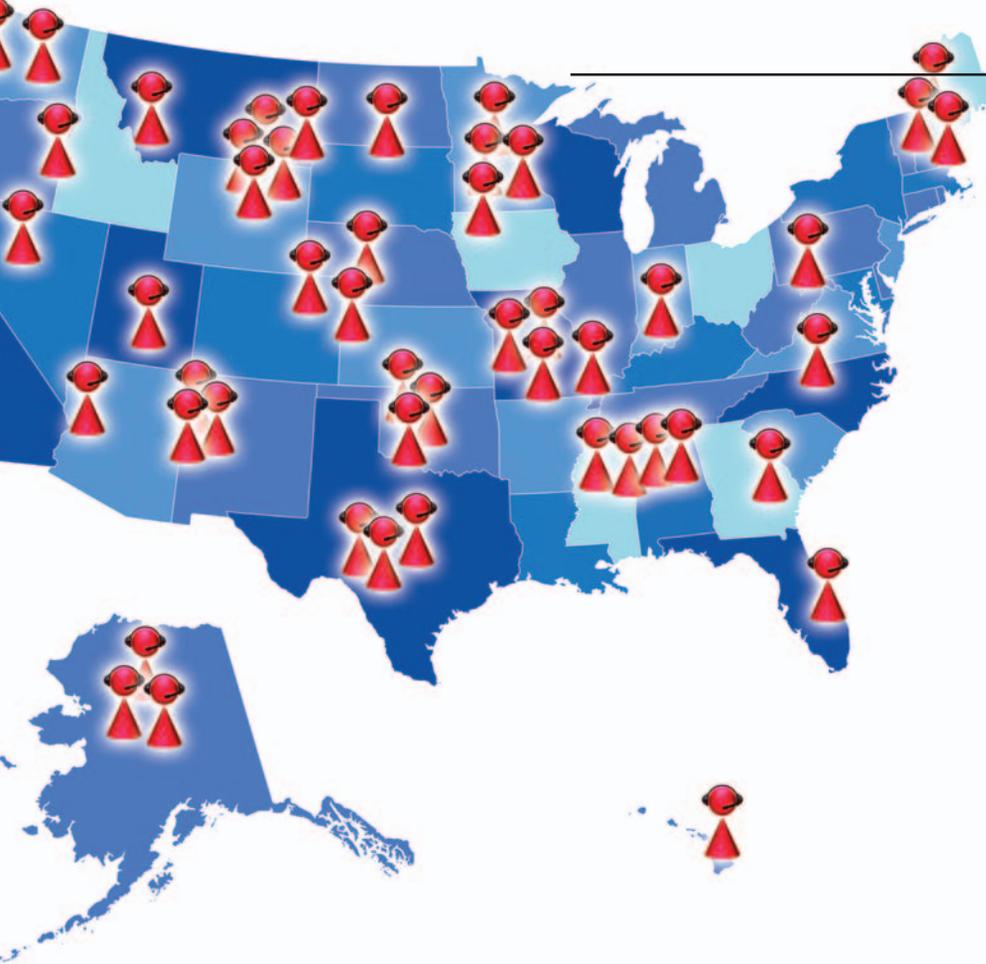
Capital investment for an enterprise deployment is not the only route to virtualization, however. Any discussion of virtualization should also address the hosted services option. Hosted IP contact center on-demand services are increasingly available from major service providers with global presence. These services not only reduce the capital requirement of contact center infrastructure to nil, but also provide instant virtualization because they are fundamentally engineered to support agents in any mix of physical locations.

Whether they follow the traditional premises model or the new hosted on-demand model, IP-based solutions are the affordable and fast-deploying virtual contact center platforms that can make the vision of a completely global, fully distributed, yet logically singular contact center a practical reality.

Consolidation - Multi-virtual Centers  
Some forward-thinking enterprises are taking the next step and consolidating their call centers into one "multi-virtual" platform. Multi-tenant platforms can support not just one distributed virtual contact center, but any number of them. Most large enterprises have several contact centers addressing completely different applications. From a staffing perspective, it may not make sense to combine them. But from a technology perspective, it can make a lot of sense and save a lot of dollars.

A multi-tenant platform provides Web-based self-administration to each individual tenant, so for tenants it's just like having





their own dedicated platform. Combining the workloads of multiple applications by combining multiple tenants on the same platform generates greater economies of scale across all the contact centers operating within an organization. There are also economies of scale in implementation and support personnel, because the investment in staff training and experience keeps on paying dividends across more and more applications.

The virtual contact center took the arrival of all-IP platforms to make it economically feasible. But virtual isn't always enough. If being virtual is good, being multi-virtual is better. Multi-tenancy technology with tenant self-administration can make this unique and important innovation available to contact center professionals today.

*Steve Kowarsky is Executive Vice President of CosmoCom ([news - alert](http://www.cosmocom.com)) (<http://www.cosmocom.com>) and a frequent industry speaker on virtual contact centers.*



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# Transforming The IVR With Speech Technology

As we all know from personal experience, in the early days, there was touch-tone IVR. And let's face it — it wasn't very good. Oh, it served a purpose. As a front-end to incoming calls, at its most basic function, it could separate types of calls and least head them off into the correct general direction, eliminating the expense of hiring people to listen to long-winded caller explanations and make judgments about where to route incoming calls.

But soon, the people who configured IVRs lost the plot. I'm certainly not going to lay any blame at the feet of IVR manufacturers any more than I would blame a car manufacturer for an accident caused by a reckless driver. It wasn't the IVRs themselves, it was what call centers did with them that earned them the reputation of the second-most despised piece of call center equipment. The first, of course, being the dialer. (If we call the dialer the Typhoid Mary of the call center, we could call the old-fashioned inbound IVR the Sciatica Susan, perhaps. Third might be the Slight Cough Helen that is cheesy hold music.)

When companies began configuring their IVRs to try and take the place of humans by building their menu trees so deep and complex that more than half of users began zeroing out due to sheer, hair-pulling frustration, these companies weren't doing themselves, their customers or their agents any favors. In fact, it's hard to imagine who these companies thought they were delivering the favor to, except, perhaps, the call center manager or COO whose bonus was based on getting more people off the phone as quickly as possible. Never mind that that was being accomplished by essentially telling customers to get lost.

It's been well documented that self-service applications are notorious for raising the ire of consumers. Complaints range from not being able to easily navigate through the layers of the application to not being

able to access an agent easily once it has been determined that the system can't address the consumer's issue. (Ever been kicked out of an IVR system because you didn't make the right menu choices? How long did it take your blood pressure to go down afterwards? If you're like me, it was probably weeks.) The good news is that most of these complaints can be addressed by redesigning the flow of the self-service application.

Increasingly today, the use of speech to front end self-service call routing is erasing a multitude of past sins committed by bad IVR design. Speech can not only solve many of the problems inherent in traditional IVR, it can open up a whole host of new benefits.

A well-designed, proactive self-service application can increase user adoption rates, reduce call times and create a better overall customer experience. The key to making a proactive self-service application succeed is to offer customers the right information and constantly monitor and update this information to maintain its relevance.

## The Technology Behind The Curtain

Automated speech recognition has slowly evolved from an emerging and somewhat uncertain technology to broader adoption and alternative for the push-button, dial-tone multi-frequency (DTMF) user interface for IVRs, according to industry player Intertec. In sophisticated speech applications, it is possible to greatly reduce the

steps a customer takes to accomplish a task, and also increase the caller's satisfaction in the process. Operations that track self-service efficiency are aware that customers who become frustrated with the IVR and “zero-out” to transfer to a live agent generate the most expensive calls, since call time is nearly doubled, facilities are tied up and the services of an expensive live agent are now required. When speech recognition is added to self-service operations, it is common for there to be a reduction in the number of “zero-out” transfers to live agents by customers, an increase in calls completed in self-service and a decrease in overall call handling time by the system in well-executed speech applications.

How's that for unlooked for new benefits?

“Enterprises have long sought to provide top quality customer service at an affordable price in their voice channel,” said Ken Goldberg, senior vice president, corporate development and strategy for Intertec. “Most of our customers now recognize that the use of speech enables them to offer customers an interface that is much easier to use as it allows end users to cut through long menus and improve the accuracy of self-service. In addition to reducing personnel and operational costs for the enterprise, if used appropriately, speech technology can increase customer satisfaction and retention. When a speech application is effective, it leads to very high utilization, and therefore is also efficient for the enterprise.”

## Trends In Voice Self-Service

According to speech-enabled IVR provider VoiceObjects, in 2007, there are two significant trends in the speech-enabled IVR marketplace as it marches forward. The first is the personalization of speech-enabled IVR systems. Personalized systems deliver customer service experi-



ences that are automatically tailored or customized for each caller, using stored information including caller preferences, call and transaction history and so on. A recent white paper by industry analysts Daniel Hong and Ri Pierce-Grove at [Datamonitor](http://www.datamonitor.com) (<http://www.datamonitor.com>) ([news - alert](#)) declared that “IVR is ready for an extreme makeover” and recommends personalization as a critical component of the fix.

The second broad trend in voice-enabled IVR (here's more of that “whole host of new benefits”) is the increasing importance of complementary analytics and reporting technologies to answer a wide array of questions related to system usage, system and application performance, caller behavior and recognition success. Examples of these questions include:

- How many unique callers use the system? How many callers call repeatedly? How often do they call?
- Do transaction completion rates depend on age, customer status or other factors? Do different customer groups use the application differently?
- What is the average/minimum/maximum workload of the servers? Is the load on the cluster evenly balanced?
- Which prompts lead to an unusually high rate of “no input” or “no match” events? How do callers exit

the application?  
Try accomplishing any of that with old-fashioned touch-tone IVR systems.

With regards to what's on the horizon for the technology, Tom Chamberlain, Director of Business Process Marketing for [Aspect Software](#), ([news - alert](#)) said, “One of the major trends I am seeing in self-service deployments is the increased use of a proactive application design. In a proactive self-service application, the solution automatically provides the customer with a focused set of information that will most likely meet their needs and then proceeds to offer the customer additional options. For example, a credit card customer calling the contact center can be told the balance of their card, the last payment made, the date of the next payment and the amount due at payment. This differs from traditional voice portal designs, where a customer is offered several choices immediately and is forced to navigate a pre-determined hierarchy of steps to get to the information they need.”

In other words, speech-fronted IVR solutions can lead the customer through the maze rather than handing the caller a confusing map at the beginning and then forgetting about him.

#### How To Get Started With Voice-Enabled IVR

OK, sure. You're sold on how speech can transform your front-end. But being clever, you know there's a little more to it

than nipping down to Office Max and picking up a box of speech-enabled IVR and unfolding it in your customers' laps.

Following are some steps a company can take to implement a proactive self-service application in the most gentle manner possible, according to Aspect:

- Determine the most common inquiries in the contact center by talking to agents, listening to customers use your IVR and using quality management recording and historical reporting.
- Test the proactive self-service application on a small group of customers and collect their feedback through marketing teams.
- When choosing a customer base for roll out, pick a group that isn't technologically savvy, so that your adoption rates measurements will be more accurate.
- Communicate to your customers about what is to occur before implementation, then follow up with them afterwards.
- Over time, continue to survey customers to determine if the menu is still offering the most relevant information for them.

#### Slow Adoption?

Why is speech recognition not ubiquitous in all self-service operations? The answers can be reduced to two inhibiting factors, according to Intervice, and both are being diminished by a positive convergence of industry forces. The first inhibitor to the

widespread use of speech recognition is a lack of awareness that speech is now viable for enterprise operations. The second inhibiting factor is that, in the past, speech applications have sometimes been difficult and expensive to create and implement. Companies that have implemented effective speech applications have believed the benefits overcame the challenge of project complexity. These companies are realizing the reward of significant financial and operational returns on their investment.

**An Example**

One of Aspect's clients, a managed health-care company, has a self-service application that uses the most popular co-pay data and proactively provides that information to members and providers when they call. This satisfies the most popular inquiries, resulting in faster service and happier customers. If a member calls and the proactive information doesn't meet their needs, they are routed to a more traditional IVR menu.

"The proactive self-service application is able to help the customers get the information they need quickly, and boost their confidence level that the data is correct," a company spokesperson said. "After implementation, we saw increased self-service adoption levels of up to 50 percent. In the future, we are hoping to implement a more natural language type of application where we can ask callers what they are looking for and by their response, we'll be able to give it to them, eliminating any menu when the person calls. The goals are to take advantage of speech, having customers use speech more and to determine why they are calling."

Imagine that. Allowing your customers to use the most natural human interface, speech, to communicate with you, instead of forcing them to navigate entering multiple digits into a two-inch square key pad in a moving car with one hand. Who ever would have thought that just speaking to the system would be an improvement?

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

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**Speech Improves The Interaction**

*By Mike Chapman, Director Product Management at Cantata Technology*

Speech recognition provides a more natural method of interacting with a system in a number of ways.

- Callers do not have to remember if it is "press 1" for yes or "press 2" for no; they can speak their responses.
- Callers do not have to keep pulling the telephone handset away from their ears (particularly important when, for example, using a cell phone in the car) to interact with the key pad.
- Speech recognition can obscure the differences between IVR systems: Any one person may use several different IVRs on a daily basis (office, cell phone voice mail, home, etc.) and the need to remember different menu choices for the same function, deleting a call, for example, is eliminated. The caller need only say "delete."
- Using speech allows service providers to support different IVR systems without having to retrain their users to new systems with different menu choices.
- Speech recognition can obscure the differences between handsets: most wireless and cordless phones have the # and \* keys in a similar positions, whereas most PDAs do not.
- Speech recognition eliminates the cumbersome search for the # and \* keys.

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

# Fun Things To Do With Your IVR

## Playing Customer Service Password

This is my favorite customer service scenario (I speak with sarcasm) as of late. It goes like this:

**Agent:** Thank you for calling IndifferentCast, the cable company that doesn't much care. How can I fail to serve you today?

**Me:** Yes, I'd like to find out why you triple billed me this month for services I don't even have.

**Agent:** I'll just look that up for you. What phone number is the account under?

**Me:** I'm not sure. Try my cell phone: 203-123-4567.

**Agent:** No, there's no account under that number.

**Me:** Well, I have lots of different phone numbers. Maybe it's under my home number: 203-987-6543.

**Agent:** Nope, I'm not finding anything.

**Me:** OK, this is frustrating. Maybe it's under my work number: 800-123-4567.

**Agent:** No, I'm not seeing anything.

**Me:** Well, I first ordered services, when I had an old home phone number. Try 203-555-5555.

**Agent:** Ummmmmm...nope. Nothing there.

**Me:** Well, my boyfriend placed a service call once. Perhaps it got put under his number. Try his cell phone...860-987-6543.

**Agent:** Nope.

**Me:** Fine. Try his work number: 800-999-9999.

**Agent:** Still nothing.

**Me:** Can you just look up the account by my last name?

**Agent:** No, we use phone numbers to keep track of accounts.

**Me:** Right. Clearly, it works very smoothly. Can you try my previous cell phone number? I haven't had it in years, but maybe you've linked my account to an account I had years ago when you merged your databases. It's 203-555-1234.

**Agent:** Nope. Nothing.

It's important to note that at this point, the account number that gets printed on my cable bill each month is not, in fact, in my cable company's system as being a valid account number. Apparently, the fairies made up the customer number and put it on my bill, and it bears no resemblance to any number the company uses to keep track of customers. Which is why every time I call the cable company, we need to play this ludicrous game.

I realize no one wants to use social security numbers in these days of ID theft, but there has got to be a more efficient way.

Tell me again...what's wrong with identifying customers by their names? Or even their addresses? You'd think that as a sort of utility company, the service address would be the most relevant factor in keeping track of cable customers.

My other great pet customer service peeve is the user name/password phenomenon. In the early days, we got to make up our user names and passwords. Whatever your first experience with online customer service was, you probably sat and tried to think up a clever user name and a password that was not too obvious (the dog's name) but that you could still remember.

Little by little, the number of online accounts you had rose. A work e-mail address, a free e-mail address and a wireless e-mail address. Network passwords. User names and passwords for your bank accounts, your mortgage, your car loan, your credit cards, your car insurance, your online subscriptions, your utilities. And little by little, the demands from these companies became greater. Your user name must include so many letters and a number. Your password must be comprised of five to nine letters and two digits.

But here's the kicker: identity theft experts say you should never use the same user name and password on more than one account. And you should never write them down. I don't know about you, but as the decades pass, the chances that I'll be able to mentally keep track of 21 different user names and passwords are about as likely as me flapping my arms and flying to work tomorrow morning.

I'm holding out for voice and fingerprint biometrics to access my accounts. I realize that both of these things are used by some banks, but they're generally only the kind of banks that serve customers who would view what's in my accounts as not even worthy of raiding the couch cushions for.

I've discussed fingerprint and retinal scan biometrics with conspiracy-minded friends who worry that perhaps thieves will resort to removing fingers and eyes to get access to your computers and accounts. That's a little too James Bond for me. It's not like I'm storing the missile launch codes on my laptop. Anybody who desperately wants to find out the contents of my last five e-mails to my mother or how much balance I have on my Home Depot account for that hot water tank I just had to buy is really welcome to the information without having to remove my thumbs.

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

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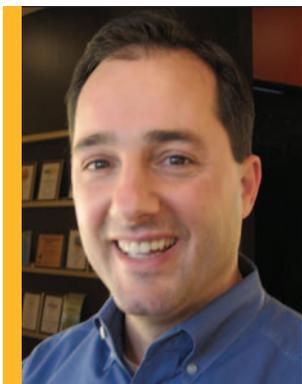
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## With Tim Passios, Director of Product Management, Interactive Intelligence

**Q** With the push from “cost centers” to “profit centers,” there’s a heightened emphasis on Key Performance Indicators (KPIs) to gauge a contact center’s value to an overall business. Are certain KPIs and metrics better than others for determining such value, and how are they best applied?

**A** Whether they realize it or not, many contact centers are already value centers. They may not directly generate revenue, but they definitely contribute to brand reinforcement and customer loyalty by handling inquiries, processing orders, routing leads to a sales team, conducting satisfaction surveys and so on.

The trick, then, is for a contact center and its parent organization to measure the business worth of such activities and how much they contribute to the company’s profit stream. And to best determine a center’s value input, contact center managers should focus on two distinct Key Performance Indicator categories:

1. KPIs to push down to supervisors and agents to improve performance, and
2. KPIs to push up to executive management.

To identify specific KPIs for each category, it’s helpful to first build a framework of the core issues that drive each indicator, such as productivity, customer satisfaction and other like concerns. These typically are issues shared by the contact center manager and the company’s executive-level directors, although their respective priority lists may differ.

Once you’ve identified the KPIs and associated metrics for your contact center, the same framework aids in applying them. Remember, measuring your center’s value comes down to knowing what’s important to the business as a whole, and to ensuring skillful and satisfactory work by agents to achieve corporate objectives.

While various KPIs can emphasize your contact center’s value to corporate decision-makers, here are some common ones.

### KPIs to push down

- **Productivity:** Agents work different hours, handle different media types, manage interactions from other countries, and are often scheduled during widely-differing traffic patterns. Given these kinds of variances, the KPI for true interactions per hour considers an agent’s number of calls, chats and or e-mail responses divided by available time—or “productive” time—regardless of media channel or traffic. Occupancy should also be factored in for busy periods vs. slow ones.
- **Quality/compliance:** First contact resolution (where applicable) and scores from an agent’s recorded interactions are the best measurements here, as is determining how often the agent escalates for assistance. Screen recording is also helpful to measure logging activity accuracy.
- **Customer satisfaction:** Can you say satisfaction survey? The customer’s viewpoint of an interaction can often be quite different than that of an agent or supervisor.
- **Schedule adherence:** Superior service levels require people being available to take interactions-when scheduled!

### KPIs to push up

- **Customer loyalty/lead identification/revenue generated.** Consider the cost of retaining an existing customer opposed to securing a new one. If agents consistently resolve complaints and “save” accounts, agree on a formula with upper management that recognizes retention value. If you identify leads, determine lead counts and their lead-to-sale

rates. And if you sell products or services, measure revenue per interaction using a formula such as:

- $$\text{Revenue Per Interaction} = \frac{\text{Total Revenue}}{[\text{Number of Interactions} \times (\text{Average Talk Time} + \text{Average After-Call Work})]}$$

- **Cost per interaction.** First, consider that the costs for e-mail and Web chat often vary from those per call, and that certain interactions are more time-consuming than others. Trend analyses can track costs in these areas. Second, keep in mind that not all cost increases are bad—especially when they correlate with an increase in revenue per interaction, better satisfaction ratings, etc.
- **Customer satisfaction.** Leverage satisfaction surveys and present results to upper managers on a regular basis. Surveys reflect the actual voice of the customer, and in turn reflect the tangible value of your contact center.

Other KPIs to push up are actually many of the same ones you push down. Productivity, quality/compliance, escalation of contacts, general accessibility, marketing data you pass on, etc.

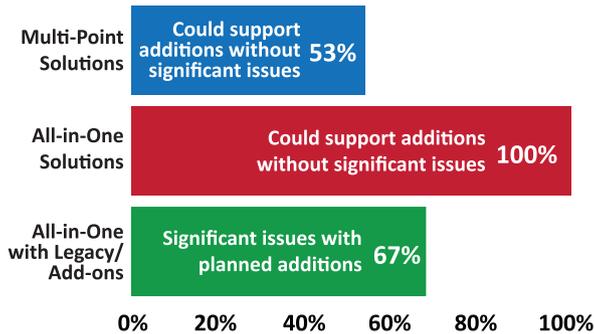
### The true value of your contact center

Collectively, KPI results present a balanced scorecard. For an agent, push-down KPIs help identify goals toward which to work, while for executive management the KPIs you push up can reflect your contact center’s success. If you process leads, generate revenue, help retain customers and increase satisfaction levels, this is value your contact center contributes... and the executives of your company should be fully aware of it. **CIS**

*Tim Passios has more than 16 years’ experience in the contact center industry and is the Director of Product Management for Interactive Intelligence, Inc., (news - alert) a leading provider of business communications software for the contact center and enterprise with over 2,500 installations in more than 60 countries. For more information, contact [info@inin.com](mailto:info@inin.com) or 317-872-3000.*

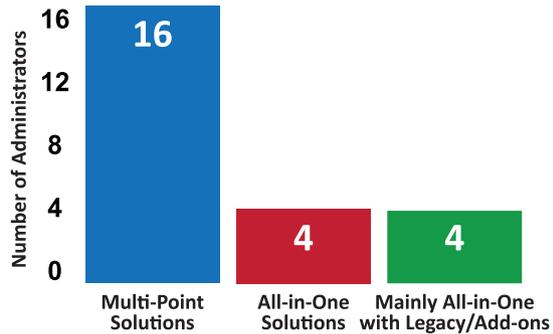
This monthly page displays the results of quantitative research that is thought to be mission critical to the efficient and effective operation of your customer service contact center. Research interpretation is limited by the total space allocated here. For more detailed information about this research, please visit [www.getinContact.com/addons](http://www.getinContact.com/addons).

### Ability to support planned technology additions



**Figure 1.** Multi-point refers to technology solutions purchased from different vendors with different platforms, then “integrated” to work together, often by an outside “system integrator.” All-in-one solutions are technology solutions supplied by one vendor, and designed from the ground-up to work seamlessly together on the same platform. Call center managers with all-in-one solutions felt upgrades were a non-issue, versus 47% of multi-point call center managers reported that upgrades caused significant issues.

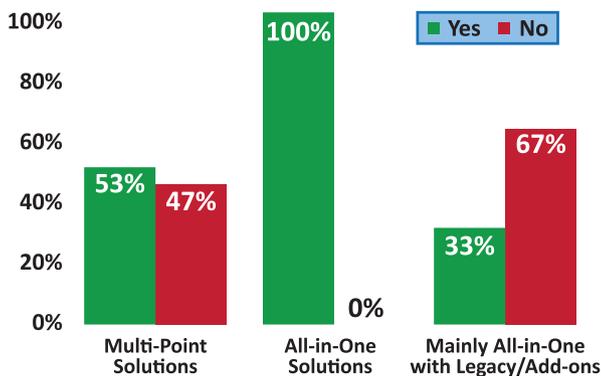
### Average number of system admins in respondent contact centers



**Figure 2.** The 500+ participants in the research reported a 4 to 1 difference in staffing between multi-point and all-in-one. The most-often stated reason for this was the support issues related to multi-point, multi-vendor products that operate on multiple platforms, and that are typically integrated by multiple outside consultants.

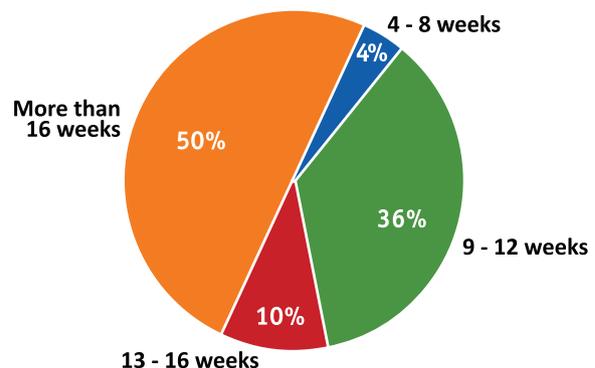
To learn more on any of the research presented go to [www.getinContact.com/addons](http://www.getinContact.com/addons)

### Will current systems support add-ons without significant issues?



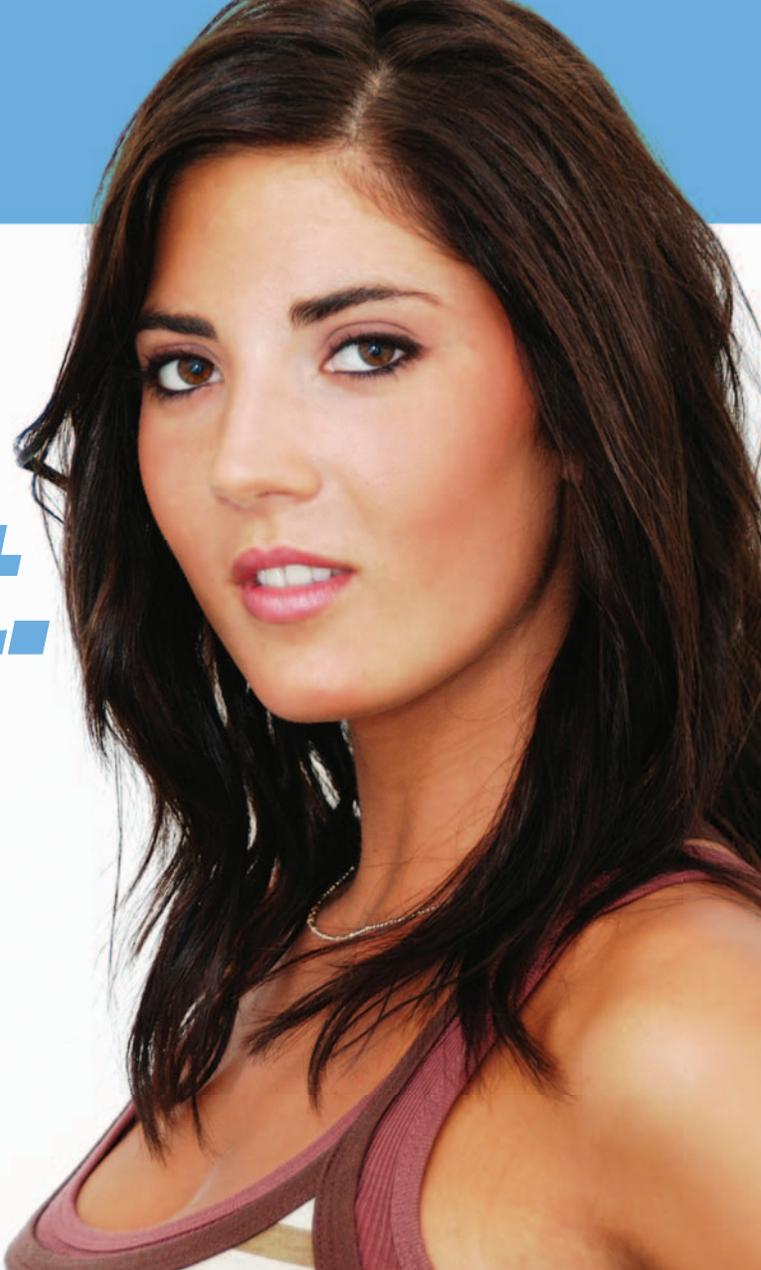
**Figure 3.** All technology solutions incur periodic upgrades, even if these upgrades are simply the latest revision of the existing software. With multi-point, if any one “point” solution gets upgraded, it typically requires interfacing changes to every other point solutions. For that reason, 47% of multi-point users reported significant issues with add-ons.

### Estimated weeks req'd to evaluate, select, & negotiate contract for new add-on.



**Figure 4.** With multi-point solutions, each point solution requires time for evaluation, selection, and contracting. With all-in-one, the vendor selection steps are done once, and all additional solutions are merely “turned on” in the already selected and contracted solution.

To learn more on any of the research presented go to [www.getinContact.com/addons](http://www.getinContact.com/addons)



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