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## The Home Agent Model:

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- Microsoft's Call Center Push
- Choosing Contact Center Solutions For SMBs
- 9th Annual CRM Excellence Awards, Part One



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

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## ➤ Publisher's Outlook



**Nadji Tehrani**, CEO,  
Technology Marketing Corp.

## CERTIFICATION... TO TAKE CONTACT CENTERS TO THE NEXT LEVEL

Since June 1982, when this publication, in a pioneering act, laid the foundation for the telemarketing, call/contact center and CRM industries, there have been phenomenal changes in the technology, operation and management of contact centers.

New technology developments for the call/contact and CRM center have particularly accelerated in the last five years, thus rendering many call centers obsolete and/or non-competitive. About the year 2000, along came offshore outsourcers with much cheaper labor. This development alone rendered many domestic outsourcers, as well as in-house call centers, non-competitive and forced many weaker contact centers out of business.

As I predicted in many of these editorials (in 1999 through 2002), many of the short-sighted companies that went offshore based on "cheap labor alone" ended up losing many of their customers because of very poor service, cultural problems, rudeness and language and communication barriers, among many other problems. Eventually, many of these companies that lost millions by offshoring their teleservices returned to the U.S. looking for domestic vendors. The U.S. call centers that are the beneficiaries of this opportunity (both in-house and teleservices) must meet three criteria in order to compete cost-effectively:

1. They must be early adopters of new technology;
2. They must know how to use and manage the new high-tech call centers; and
3. They must know how to use advanced technology to offer high-quality CRM and customer care services.

As the industry's pioneers and the global online leaders (TMCnet.com with over three million unique visitors) and in print with *Customer Interaction Solutions* magazine, the industry's preeminent magazine since 1982 and the sponsor of Call Center 2.0, the call center industry's leading technology conference and expo with over 1,000 call center decision makers, it is our paramount responsibility to offer the finest available training to our valued readers and trade show delegates to help them take their contact centers to the next level.

### Announcing a NEW Certification Program by TMC University

In response to the real needs of the call center industry, TMC ([News - Alert](#)) University and *Customer Interaction Solutions*® magazine are proud to announce three NEW certification programs as follows:

1. How to profit from SaaS (software-as-a-service) ([News - Alert](#))
2. IP contact center
3. Next-generation call center management strategies

The certification program will be offered at Call Center 2.0 Conference and Expo to be held at the Los Angeles Convention Center on September 16-18, 2008. For more information, please visit [www.callcenter20.com](http://www.callcenter20.com).

I look forward to welcoming you to Call Center 2.0 2008. **CIS**

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





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### The Home Agent Model Is (Finally) Ready For Its Close-up

By Tracey E. Schelmetic, Editorial Director, Customer Interaction Solutions

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Rich Tehrani, Group Publisher, Technology Marketing Corp.



## CRM: Open Source And Non-Profit

**C**ustomer relationship management is a very different animal than it used to be. Pick up an issue of any magazine, including this one, from about six to eight years ago and flip through for information about CRM, and you'll wonder if you're reading about the same technology. What's different nowadays? Too many things to list right here and right now. But two of the hottest growth areas in this new wave of CRM are solutions for niche markets and specialty functions, and open-source CRM. Dallas-based MPower provides both: it's the only full-feature, truly open source CRM software specifically designed for nonprofit organizations. More than 200 charitable organizations as well as consulting firms and professionals working in the philanthropic community now have downloaded MPower since it became available as an open source offering without licensing fees on March 11. I recently spoke with Randy McCabe, Founder and CEO of MPower, about the company and its future.

**RT:** Why did you decide to go open source?

**RMCC:** Moving to an open source model has been our plan for some time now. Over the last year, although we have made significant enhancements to our product and service offerings, we also have recognized the inherent shortcomings of the proprietary software business model. Under the old proprietary software model, clients are "held hostage." They lack control and options for having the features and functionality they need when they need it. The product roadmap moves only as fast as the proprietary company's development team priorities. This model also forces clients to pay for new modules and releases whether they like them or not — or they have to replace their entire system.

All of us at MPower strongly believe that moving to an open source model is the right thing to do generally and absolutely the right thing to do for the nonprofit community, which needs software that's as full-featured and powerful as products for the commercial sector. We also want to give clients full control over their technology and ultimately, their destinies.

**RT:** Was this an easy decision?

**RMCC:** This was an obvious decision because of the shortcomings of the proprietary software model coupled with appreciation for the technology needs of the nonprofit community, as outlined in my response to the previous question. The challenge, of course, was changing from our existing business model, based heavily on licensing our software, to the new model of giving away the product and providing fee-based support and services. Over time, with our software widely distributed, we'll support and provide services to a much larger client base, so we expect the business to scale significantly. Making these changes clearly is the right thing to do for the nonprofit community and also good for growing our business — it's the perfect definition of a win-win value proposition.

**RT:** How has the developer community responded to this news?

**RMCC:** Response to MPower's open-source offering has been extremely positive! Our clients are thrilled to now have complete control over their CRM technology, which translates to the ability to be more effective.

Karen Jacobs with Precept International characterized our move to an open-source CRM solution as "nothing short of revolutionary for the nonprofit community" and "the next big thing for charitable organizations." She told us, "It is as important a development for nonprofits as the Internet, which has become a critical tool for cultivating constituent relationships and driving fundraising."



## ➤ ONLINE EXCLUSIVES

### Study Reveals Chat Underused On E-Commerce Sites

By Tracey E. Schelmetic, Editorial Director, Customer Interaction Solutions

A new survey commissioned by e-commerce chat company inQ and conducted by the e-tailing group assessed how 31 retailers and telcos that offer chat on their respective Web sites use the technology to sell. The results? Chat is underused. "One of the most surprising — and disappointing — findings when I conducted these chats was how seldom a chat culminated in the agent asking for the sale," said Lauren Freedman, president of e-tailing group. Freedman added.

[Read the full article at www.tmcnet.com/1964.1](http://www.tmcnet.com/1964.1)

### Consumers Relying On Social Media To Share And Research Customer Care Experiences

By Stefania Viscusi, Contributing Editor, Customer Interaction Solutions

With more and more people turning to social media for both business and personal interactions, the use of this channel has now also become a platform on which consumers are sharing their personal experiences and opinions on companies and the customer service they receive. Social media platforms provide the informed consumer with information not only about others' customer care experiences, but also helps in shaping their purchase decisions. These findings are part of a new research study, "Exploring the Link Between Customer Care and Brand Reputation in the Age of Social Media," from the Society for New Communications Research.

[Read the article at www.tmcnet.com/1965.1](http://www.tmcnet.com/1965.1)

### Performance Management Drives Efficiency In The Contact Center

By Susan Campbell, Contributing Editor, Customer Interaction Solutions

Performance management is often perceived as one of those buzzwords that corporate executives will use in order to drive efficiency within company departments. While such perception can encourage some to overlook the importance of the concept, many organizations are stepping up their efforts to implement solutions that actually impact performance. In the contact center industry, many employees are in a position where their everyday activities change very little from day to day. Their goal is to handle customer interactions as efficiently as possible, while also driving other performance metrics set by corporate management.

[Read the full article at www.tmcnet.com/1966.1](http://www.tmcnet.com/1966.1)



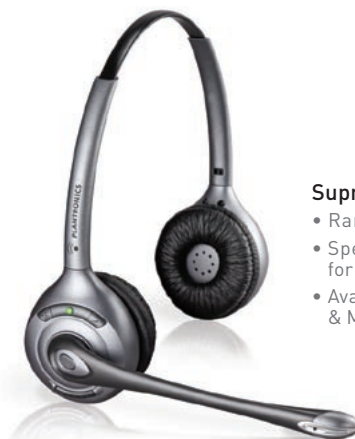


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Barry Durman, with East-West International, has said, "MPower is already a powerful and mature CRM software for nonprofits – I can only imagine how open-source will positively affect the product velocity and innovation."

And Brenton Evans from Marriage Today said, "Offering such a powerful CRM solution to all nonprofits without any big upfront software investment means that every nonprofit now has access to the most powerful constituent relationship and fundraising tool on the market."

**RT:** How does nonprofit CRM differ from other types of CRM?

**RMCC:** One of the biggest differences is that nonprofit CRM is multi-constituent and multichannel. A nonprofit's constituent likely has several types of relationships with the organization and interacts with it through a variety of ways – for example, a single constituent can be a donor, advocate and event attendee who participates through postal mail, e-mail, a Web site, a fundraising run or a bike ride, etc. MPower enables a nonprofit to easily manage the relationship and communications with donors, volunteers, customers, subscribers, event attendees, viewers and listeners through direct mail, e-mail and Web sites, events, magazines and newsletters, telephone, radio and TV. A big part of the differentiation is in the management of gifts, product orders and any other types of transactions including soft gifts and gifts in-kind.

**RT:** How open is your solution and how does it compare to other solutions on the market?

**RMCC:** MPower is completely open – clients have full access to our source code. It doesn't get any more open than that.

There's no comparison between our offering and everything else currently available. It's "apples-to-oranges," so to speak. Although a number of nonprofit CRM software vendors are recognizing the value of collaboration and making their products more open (which we applaud as a first step), none of the major players is providing a truly open-source solution. Only MPower is doing that.

Some companies are helping nonprofits add other software to their proprietary solutions by doing things such as opening a few application programming interfaces, but typically the vendor has to handle implementations. No company other than MPower provides access to its source code to enable clients to

**Rich Tehrani**, *Group Publisher, Technology Marketing Corp.*

develop the functionality they want when they want it. This is a key characteristic of open-source software.

Also, MPower, like true open-source companies, is providing a full gamut of support and services pertaining to the software and governance for the user community – including things like managing the source code, aggregating new code and providing quality assurance and product documentation, plus managing the client forums and knowledgebase.

**RT:** Does interfacing with open-source telephony solutions make sense for your company to ensure?

**RMCC:** Absolutely. Many of our clients and many nonprofits (especially larger ones) have call centers, or they outsource both inbound fundraising responses and outbound fundraising calls to call centers. Our solution has a call center screen to capture inbound data or provide customer service to callers.

**RT:** What about unified communications – is this an area of the market your software needs to work with?

**RMCC:** Unified communications is what our software helps nonprofits achieve for their constituents. From a software integration standpoint, MPower should be part of a unified communications platform for nonprofits because we are open-source and built to be the centerpiece of a unified communications strategy.

**RT:** Will you consider bringing your software into other markets that are for-profit, for example?

**RMCC:** Because our software is a full-featured, mature CRM solution that is completely open – with full access to the source code, it likely would have tremendous appeal to the commercial sector. However, the nonprofit sector is a huge and vastly underserved market when it comes to CRM. We are focused singularly now on providing the best, fully open CRM solution for this very important community.

**RT:** Where will your company be in five years?

**RMCC:** We will be the most trusted and effective constituent relationship management solution for the nonprofit community.

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

*To learn more about MPower, visit [www.mpoweropen.com](http://www.mpoweropen.com).*

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[www.tmcnet.com/1914.1](http://www.tmcnet.com/1914.1)

### **Symon Solution Rated Avaya (News - Alert)-Compliant**

Digital signage provider Symon recently announced that its Symon Enterprise Software R9.2.01 (SES) is compliant with Avaya IQ 4.0, a reporting and analytics platform that consolidates real-time data from Avaya customer service solutions and enterprise business resources to deliver reports that relate activity to results, providing insight into the total customer and agent experience. Features of the Avaya IQ solution include reporting tools, easy customization, and standard reports, and dashboards that support monitoring of key performance indicators (KPIs) with cross tabs, drill down and roll up capabilities for easy analytics.

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

[www.tmcnet.com/1915.1](http://www.tmcnet.com/1915.1)

### **Cemaphore Delivers SaaS E-mail Solution For Gmail**

Cemaphore Systems, Inc. has debuted a new way for people to manage and protect their e-mail content with the announcement of MailShadow for Google (News - Alert) Apps (MailShadowG) that synchronizes e-mail, calendars and contacts between Outlook, Exchange and Gmail. MailShadowG is, according to the company, the first software-as-a-service (SaaS) e-mail continuity and disaster recovery solution using the Google Apps cloud-based services. The offering makes these business-critical services affordable and accessible to end users, SMBs and enterprises.

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

[www.tmcnet.com/1916.1](http://www.tmcnet.com/1916.1)

### **LiteScape And Spanlink (News - Alert) Announce Reseller Partnership**

Unified communications applications provider LiteScape Technologies, Inc. has announced that Spanlink Communications will resell LiteScape's (News - Alert) Unified Communication (UC) applications. The partnership is expected to enable Spanlink to provide its customers with more powerful, agile solutions that deliver organizational competitiveness and agility.

[www.litescape.com](http://www.litescape.com)  
[www.spanlink.com](http://www.spanlink.com)

[www.tmcnet.com/1917.1](http://www.tmcnet.com/1917.1)

### **Salesforce.com (News - Alert) Releases Customer Satisfaction Ratings**

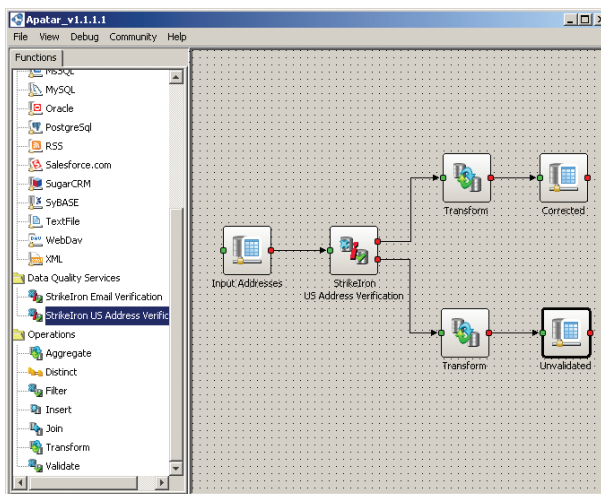
Salesforce.com has shared results from customer satisfaction surveys conducted by in-

dependent research firm CustomerSat. Of the over 4,100 Salesforce users from around the globe who responded to the surveys, a full 94 percent said they "definitely will" or "probably will" continue to use Salesforce products.

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

[www.tmcnet.com/1918.1](http://www.tmcnet.com/1918.1)

### **Apatar Intros Open-Source Address Verification Solution**



Apatar, a vendor of open source software tools for the data integration market, has announced the official release of its new StrikeIron US Address Verification connector for the Apatar Open Source Data Integration toolset. The feature relies on U.S. Postal Service-certified technology to verify, correct, and enhance any address in the United States with live data. It "cleans customer data before it gets into CRM/ERP systems, databases, flat files, and RSS feeds by correcting extracted addresses, adding ZIP+4 data, specifying congressional districts, carrier routes, etc.," according to company officials.

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

[www.tmcnet.com/1919.1](http://www.tmcnet.com/1919.1)

### **Mindshift Technologies Acquires CRM Vendor Collaboration Online**

Mindshift Technologies, which sells managed IT and VoIP services, has acquired Burlington, Massachusetts-based Collaboration Online, a privately-owned vendor of Software-as-a-Service (SaaS) products for small to medium-sized businesses (SMBs). Collaboration Online does business under multiple brands such as

GroupSpark and Agile-Wave CRM, selling hosted Microsoft Exchange Server, Windows SharePoint Services and Microsoft (News - Alert) Dynamics CRM.

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

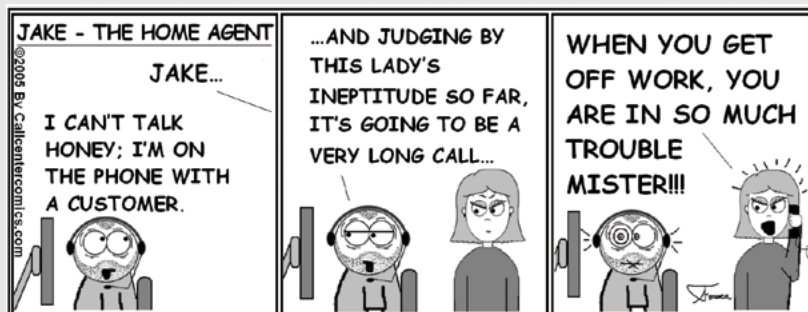
[www.tmcnet.com/1920.1](http://www.tmcnet.com/1920.1)

### **CRM Vendor Graham Technology Acquired By Sword Group**

Graham Technology (News - Alert) has been acquired by international

IT company Sword Group. "It is expected that the acquisition will help drive global uptake of Graham Technology's flagship customer interaction platform, ciboodle," Graham officials say. With offices in 16 countries, Sword employs over 2,000 people worldwide and has expertise in sectors including banking, insurance, energy and telecoms. Through the acquisition, Graham Technology officials say they expect to be able to use Sword's resources to "maximize" the company's geographic reach.

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







[www.tmcnet.com/1921.1](http://www.tmcnet.com/1921.1)

### CRM Vendor Autonomy (News - Alert) Named Leader By Ovum

Analyst and consulting firm Ovum has placed CRM vendor Autonomy as "the leader in the enterprise information access market," for "market position and breadth of functional scope and appropriateness for the enterprise" in a recent report. The report, titled "The Future of Search," notes that "through the acquisitions in 2007 of the archiving specialist Zantaz, and most recently UK records management specialist Meridio," Autonomy has earned the recognition. The report says Autonomy has "potentially the highest market awareness for search," and that its two 2007 acquisitions give it "significant capabilities in the compliance and eDiscovery field."

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

[www.tmcnet.com/1922.1](http://www.tmcnet.com/1922.1)

### Study Finds North American Consumers Want More Self-Service Options

Self-service options are growing in popularity amongst American consumers, the latest research from NCR Corporation has found. Consumers are not only showing favoritism to businesses who offer "do-it-myself" options by choosing to do business with them, but are also strengthening their brand loyalty as a result. The NCR Self-Service Consumer survey found that 86 percent of U.S. and Canadian consumers are more likely to do business with a company that offers the ability to interact using self-service via the Internet, on a mobile device or at a kiosk or automatic teller machine (ATM).

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

[www.tmcnet.com/1923.1](http://www.tmcnet.com/1923.1)

### SpeechCycle (News - Alert) Announces 50 Million Automated Calls With Rich Phone Applications

SpeechCycle has announced it automated more than 50 million natural language contact center interactions using its Rich Phone Applications (RPAs). SpeechCycle's Rich Phone Applications (RPAs) offer callers an advanced experience by integrating customizable voice user interfaces with enterprise applications and web services. The company has also announced it is expanding into new markets and will take the success of the SpeechCycle rich phone application model for Triple Play

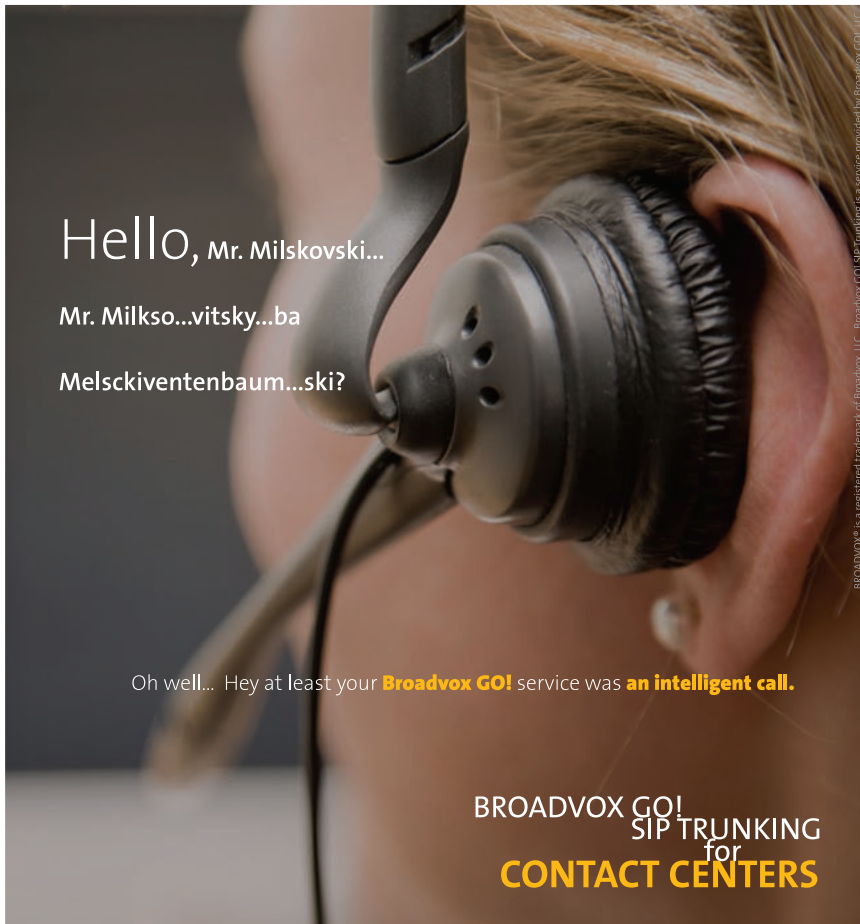
(News - Alert) technical support to also offer speech applications that integrate natural language with enterprise applications and transactional business processes in new industries to enhance customer care experiences.

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

[www.tmcnet.com/1924.1](http://www.tmcnet.com/1924.1)

### Verizon (News - Alert) Wireless Files Lawsuit To Stop Unknown Telemarketers From Calling

Verizon Wireless announced that it has filed a lawsuit to stop unknown telemarketers from calling its customers and



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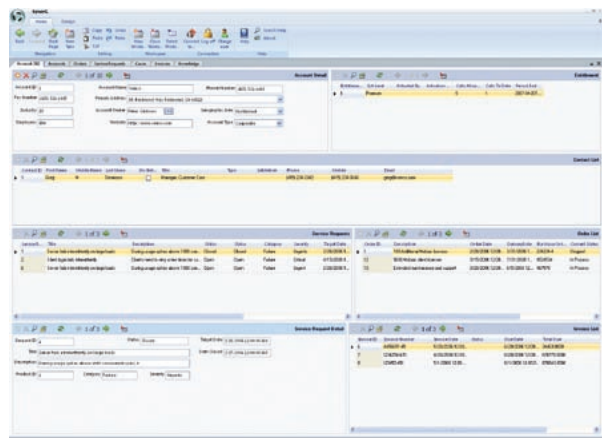


employees with an offer of an extended car warranty. The lawsuit claims that telemarketers have illegally used an auto dialer to reach Verizon Wireless customers with incorrect Caller ID information showing calls made from a variety of area codes including the 281, 614, 801 and 562 area codes. These numbers are displayed via "spoofing" techniques that mask the origin of the calls. The lawsuit, filed in New Jersey Superior Court, alleges violations of the Federal Telephone Consumer Protection Act, which makes it illegal to use an auto dialer to make calls to wireless phones, as well as state fraud and privacy laws.

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

[www.tmcnet.com/1940.1](http://www.tmcnet.com/1940.1)

### **SynerG (News - Alert) Intros Unified Application And Contact Center Solution**



A new unified application has been launched by SynerG Software. This provider of enterprise-ready business mashup solutions for multiple lines of business launched this application in order to help organizations contain costs and increase operational efficiency. SynerG aims to allow business users to access real-time information and logic from multiple enterprise systems to create a customized application designed to streamline user workflow, improve productivity and increase customer satisfaction. With the company's interactive business mashup solution, the need to perform critical job functions across multiple applications is eliminated. Employees are able to work more efficiently as business users customize information relevant to their specific duties through a unified application.

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

[www.tmcnet.com/1925.1](http://www.tmcnet.com/1925.1)

### **SugarCRM (News - Alert) Partner Awarded For SugarCRM-SAP Connector**

Open source CRM solutions provider SugarCRM has announced that its partner, Kinamu, an Austrian provider of their solutions, was awarded the most innovative IT and communications solutions in the On-Demand category at CeBIT (News - Alert) for its solution connecting SugarCRM and SAP. Kinamu's offering brings together Sugar Professional and SAP ERP for a 'solution-as-a-service' offering that makes it possible for companies to "integrate Sugar Professional with SAP (News - Alert) in real-time, synchronizing system parameters and customer master data such as account and contact details."

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

[www.tmcnet.com/1926.1](http://www.tmcnet.com/1926.1)

### **Remote Access "Homeshoring" Trend Shows Commitment To Green Technology**

Companies in a variety of industries, including customer-facing call and contact center organizations, are looking for ways to leverage technology in new ways to lessen impact on the environment. Remote access systems are one way to be "green" by reducing

the need for employees to commute. The interest in remote access systems has given rise to a number of firms that specialize in this very technology. TMCnet recently turned to one such company for some perspective on the "homeshoring" trend. Connie Adcock, vice president of VSC relations, operations and results at Arise Virtual Solutions, shared her insight into why companies are finding it makes sense to give employees the tools they need to work from home.

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

[www.tmcnet.com/1927.1](http://www.tmcnet.com/1927.1)

### **damaka Introduces Computer-Telephony Interface**

damaka has launched its computer-telephony interface (CTI (News - Alert))-capable Personal Softswitch application. Satish Gundabathula, damaka CTO, said CTI is used

to implement intelligent call routing and calls can be routed based on account and/or caller specific information. The damaka (News - Alert) application can now perform intelligent call routing and management at the end user level. The company explains that damaka enterprise application could be CTI enabled by integrating to a CTI Server, which is linked to the PBX (News - Alert). The CTI Server has the ability to both receive event data from the PBX as well as command/control the PBX.

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

[www.tmcnet.com/1928.1](http://www.tmcnet.com/1928.1)

### **ClickFox (News - Alert) Takes Customer Experience Analytics Beyond The Contact Center**

When people talk about the customer experience and customer satisfaction, they should be referring to the complete picture, from the moment a customer first enters a retail outlet or online market, not merely the contact with a call center agent or IVR system. Certainly, contact center activity is critical, but it's also directly related to other previous engagements, and that's what businesses need to be able to understand in order to truly understand the customer experience. ClickFox has taken that to heart, and is providing Customer Behavior Intelligence (CBI) solutions to businesses, allowing its customers to identify and analyze the complete customer experience.

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

[www.tmcnet.com/1929.1](http://www.tmcnet.com/1929.1)

### **Altitude Software (News - Alert) Launches New Partner Program**

Altitude Software, a global independent contact center solutions vendor, has announced its new Altitude Software Partner Network Program (ASPN). This new program is designed to offer increased benefits and improved services and resources targeted for Altitude uCI solution system integrators, consulting companies, distributors and value-added resellers worldwide. Partners are provided access to business development and marketing resources, as well as joint marketing activities in specific markets and market verticals. Partners are also provided with sales and technical training, sales and sales engineering specialists focused on business partners, and priority access to the company's ISO9001:2000 globally certified Technical Customer Assistance.

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





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





[www.tmcnet.com/1936.1](http://www.tmcnet.com/1936.1)**Hosted Contact Center Software Solutions Fit For Growth**

Rumors are flying that the U.S. is in store for a significant economic downturn. A simple stop at the gas station or local grocery store reveals signs of a recession. As consumers, we understand what such conditions are doing to our pocketbook. For organizations, they are feeling the crunch as well and their ability to embrace it will be key for not just growth, but survival. In a variety of industries, price as a competitive factor has lost its power as many products and services have been reduced to commodities. As a result, organizations must turn to other methods in order to achieve differentiation. For many, that differentiation is found in their approach to customer service.

<http://www.five9.com/call-center-software.htm>

[www.tmcnet.com/1937.1](http://www.tmcnet.com/1937.1)**Survey Shows Price is Bigger Factor In Outsourcing Negotiations**

Although the global outsourcing market is showing significant growth, the threat of an economic downturn appears to be having a greater impact on outsourcing contracts than the promise of current growth. Now, client organizations are concerned about a looming economic downturn and as a result are pressing outsourcers for price reductions of up to 23 percent as they negotiate extensions of long-term deals. Management consulting firm, Compass, completed a 12-month analysis of 120 global deals worth more than \$60 million each. This study found that renewal negotiations are increasingly being driven by pricing pressure.

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

[www.tmcnet.com/1938.1](http://www.tmcnet.com/1938.1)**LiveOps (News - Alert) On-Demand Call Center Platform Now Available On AppExchange**

LiveOps, a virtual call center company, has announced the successful integration and certification of its On-Demand Call Center Platform with the Salesforce CRM application suite. This integration is set to provide inbound and outbound telephony management, call routing, agent availability, CTI screen pop and call control for use with Salesforce CRM. Agents using the Salesforce Call Center application can benefit from skills and performance-based routing, immediate access to caller information through CTI and

the ability to manage calls with the click of a mouse within Salesforce. A demo is now available on the AppExchange.

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

[www.tmcnet.com/1939.1](http://www.tmcnet.com/1939.1)**Alcatel-Lucent (News - Alert) Enhances IP Service Routing Portfolio**

Alcatel-Lucent has announced extensive enhancements to its IP service routing portfolio. The company implemented these enhancements in order to help operators around the world meet the demand for higher bandwidth and scale, a richer service mix, reduced cost and increased availability. The 7750 Service Router (SR) and the 7450 Ethernet Service Switch (ESS) have been enhanced to deliver Terabit performance in order to provide the bandwidth, scale and service awareness required to support the growing market for more personalized, broadband offerings such as IPTV (News - Alert), WebTV, Virtual Private Networks and 3G/4G mobile.

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

[www.tmcnet.com/1941.1](http://www.tmcnet.com/1941.1)**Unica Enhances Affinium Suite To Optimize Marketing Across Multiple Channels**

Unica Corporation, a global provider of enterprise marketing management (EMM) solutions, has announced enhancements to

pressure to deliver more relevant and frequent inbound and outbound offers and Unica's automated analytics, integrated suite, and cross-channel capabilities can help streamline the entire marketing process.

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

[www.tmcnet.com/1942.1](http://www.tmcnet.com/1942.1)**8x8 (News - Alert) Intros Salesforce.com CRM Integration for Packet8 VoIP**

In the race among service providers to differentiate IP communications offerings, some competitors are targeting the customer relationship management (CRM) market. Integration with CRM systems is common in large enterprises and even smaller companies have embraced the concept. Now, small business customers utilizing a hosted solution have access to a cream-of-the-crop hosted CRM package: Salesforce.com. 8x8's Packet8 service now integrates with Mark Benioff's creation. What does this mean for the market? Simple: powerful services are becoming available to smaller and smaller business customers.

[www.8x8.com](http://www.8x8.com)

[www.tmcnet.com/1943.1](http://www.tmcnet.com/1943.1)**Nortel's (News - Alert) Customer Experience 2.0**

Perhaps one of my most interesting vendor meetings as of late was with Nortel, during which David Murashige, VP and general manager of Multimedia Applications, and Debora Glennon in Multimedia Applications Marketing, really got me thinking about the way customers are serviced today. For example, Glennon started talking to me about customer experience 2.0, which reminded me a great deal of the Call Center 2.0 event TMC currently sponsors twice a year. But Nortel really takes the 2.0 to the next level

as they integrate the Web with their customer service solutions. They feel that the company of the future needs to worry about social networking, blogging and all other areas of Web 2.0. The scary thing about customer service today is that a single customer can tell millions of other potential customers about how unhappy they are with your company.

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



its Affinium suite. These enhancements are expected to improve marketers' abilities to optimize the selection and delivery of the most relevant and profitable marketing messages for each customer across many channels. This latest release is designed to deliver performance enhancements and tighter suite integration for improved productivity, time-to-market and accuracy. Marketers continue to feel mounting





By Jim Ivers,  
Chief Marketing Officer,  
Vovici

Innovative Solutions From The Enterprise Feedback Management Experts

## Increase Retention With Employee Panels

Communities have long emerged as critical tools for building and maintaining customer loyalty and satisfaction. Such communities can be equally effective as tools to improve employee retention. Building a thriving employee community promotes a sense of shared experience as well as a sense of influence — important elements to build a strong bond with your organization. When the employees believe that they have an influential voice, it deepens their commitment to the organization and encourages ongoing feedback, creating a continuous, positive dialog.

Soliciting feedback from employees is certainly nothing new or revolutionary. But the track record for such initiatives is certainly not a good one, as data is often collected but not truly used to make critical business decisions about the employees. More directly, employees are rarely informed about findings from the process and too infrequently see any change as a result of their participation. Creating and managing a panel of respondents from an active employee community can address these historical problems and perceptions.

### Step 1: Get employees on board.

To recruit employees to a panel, you need to clearly express the benefit of taking part in the process and how much time they will be asked to invest. Managing survey fatigue is a key element to making these panels effective, and employee respondents need to know that you will respect their time. Once a respondent agrees to be part of the process, it is crucial to build deep profiles that facilitate targeted feedback initiatives focused on specific issues or concerns within certain groups or departments.

### Step 2: Create an interactive experience.

Studies have shown that 50 percent of respondents feel properly motivated to participate in exchange for seeing the survey results. By integrating a portal or dashboard, respondents can see a summary of their active surveys along with the associated results. Such access gives respondents an on-demand and real-time view into the feedback process. If you choose to use incentives for participation, respondents should also be able to view their earned incentives and use them as appropriate.

### Step 3: Earn and reward their trust.

Taking a survey is an act of trust, and violation of that trust will have negative consequences. You should set standards to ensure that respondents are treated properly. For example, no survey should take longer than

15 minutes to complete and there should be an accurate visual indication of the survey's completion progress. Employees will respond positively to this protection of their rights, and their subsequent willingness to participate will help drive up response rates and therefore the value of the collected feedback.

### Step 4: Build a “rising spiral” of feedback.

The final step toward building a sense of influence is demonstrating to the community that their voice is not only being heard, but that the organization is taking action based on their feedback, complete with continuing status updates of initiatives. This truly reinforces the sense of influence and ensures that the community members believe their participation is time well spent. Most importantly, it has a “rising spiral” effect of strengthening the community and encouraging more employees to participate in the feedback process.

The advantage of building a respondent panel from your employee community is that you can gather regular and consistent feedback. This not only keeps you current with the thoughts and concerns of the employee base; it also provides the ability to spot trends and evolving employee sentiments over time. The process is extremely cost effective as well—once the initial start-up process is complete, the cost associated with each survey is extremely low. The end result is timely, consistent and regular feedback data, gathered in a cost-effective way to maintain a close understanding of employees and their needs.

*Vovici (News - Alert) is the pioneer in Enterprise Feedback Management, offering products and services that increase customer loyalty, facilitate collaboration and innovation, influence critical business decisions, and provide a voice to online communities. Organizations worldwide, including more than 58 percent of the Fortune 500, rely on Vovici to help them effectively use surveys to identify employee satisfaction, market research, and customer satisfaction; and act on that information to create long-term relationships, increase profitability and facilitate time-critical actions that drive business results.*

### Listening To Agents: A Radical Concept

By Tracey E. Schelmetic, Editorial Director,  
Customer Interaction Solutions

No one knows your customers like your agents do. Pushing decisions onto them from the top down, without listening to their suggestions and needs, makes about as much sense as buying new software for the call center without bothering to determine the call center's needs in advance.

Research has shown time and again that one of the major causes of turnover is employees feeling frustrated that they are not being given the right tools, either in terms of training or technology, to do their jobs correctly. A frustrated agent quickly turns into a burned out agent, who quickly turns into an agent who harms the customer relationship. By the time the agent has quit, it's too late. The agent is gone, the resources you invested in that agent are wasted, and the agent is not interested in telling you why he or she is leaving. It's not worth his or her effort. The intervention needs to happen BEFORE a dissatisfied agent becomes a burned out agent, onward down the spiral.

On the flip side, the most satisfied agents are those who feel a sense of community in the workplace. They've bonded with co-workers. They feel like a part of a team. They take pride in their accomplishments. They don't dread coming to work every day.

Whether your call center comes to be full of the frustrated, disenchanted agents or the spirited, enthusiastic agents is not an accident. It may hinge on factors you never imagined: a friendly, competitive contest that awards agents for performance once a month. Agents who plan together to decorate for holidays. Sufficient break time to recharge before an afternoon shift. Comfortable headsets. An attractive call center interior.

Agents don't want to feel like commodities. Too many companies treat them as such, however. And until you start really listening to them, it will hard to know if your organization is one of them.

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# The Home Agent Model Is (Finally) Ready For Its Close-up

**T**he home agent model, for the past several years, was the call center equivalent of the “video phone.” It was always the next “up and coming thing,” not quite ready yet for its close-up, and many privately doubted that it ever would be, except for a few small niche companies and a couple of notable and oft-repeated case studies, most notably in the travel industry. As it turns out, as with many somewhat revolutionary ideas, all it needed was the right circumstances. Couple a need for better customer service in order to compete with perceptions of declining service quality supplied by offshore call centers. Throw in the continued need to cut costs. Mix in some depletion of popular regional call center worker pools. Sprinkle in the declining value of the U.S. dollar, making even nearshore destinations like Canada less attractive. Add the escalating cost of healthcare benefits, traffic congestion and the price of gasoline. Fold in the fact that technologies such as IP-delivered call center solutions are standard fare in enterprises today and no longer perceived as part science fiction. Shake it and bake it, and you’ve got an extremely fertile environment for the use of home agents.

Home agents, as we know, are hired, professional contact center representatives who can reside (and work from) anywhere there is a phone and Internet connection. The benefits are multi-pronged. Cost savings begin, but certainly do not end, with lower facilities-related overhead. In a 2006 “Telework Benchmarking Study” by The Telework Coalition, organizations reported cost savings associated with reduced real estate requirements of \$3,000 to \$10,000 per employee.

The next major cost savings comes from the quality of the home agent pool. Home agents tend to be older, more mature, with more experience, and therefore less likely to churn and more likely to provide better customer service. Research firm, Yankee Group ([News - Alert](#)) explains that “remote agents tend to be older, more educated and often have business and management experience...job turnover rate, or churn, among this group of workers is typically half that of in-house contact center employees which is known to be between 50 percent and 100 percent annually in traditional centers.” Anecdotally, we know it can be even higher than 100 percent annually.

Rising gas prices, too, are helping to convince employees to work from home, for at least part of the time. In addition, high housing costs in urban centers are forcing longer commute times from suburbs and exurbs, which provides further incentive to work from home, according to IDC ([News - Alert](#)) analyst Stephen Loynd.

So how big is the push to use home agents? Right now, it is estimated that there are

upwards of 200,000 remote agents working in the U.S. According to analyst group IDC, the number of home-based agents is expected to reach 300,000 by 2010.

The early adopters of the remote agent model were the travel industry (Jet Blue Airlines is an oft-mentioned example) and business process outsourcers. However, expect to see the model spreading outward across multiple verticals. In reality, any vertical can benefit from adopting an at-home agent model, especially those industries that require a flexible labor pool and round-the-clock call center coverage.

To gain a bigger perspective on the pros and cons of the home agent model, and some practical tips for succeeding, we spoke to several companies, both providers of home agent services and companies that offer technologies to better enable the model, and asked them to point out the benefits and drawbacks, and the factors to be aware of, when considering taking the route of the home agent call center.

## Aspect ([News - Alert](#)) Software ([www.aspect.com](http://www.aspect.com))

**Jim Mitchell, Vice President, Technology Office**

Employees can also experience the benefits of an at-home work environment due to reduced commuting stress, flexible work schedules and even increased job satisfaction, which ultimately provides a better quality of life and typically leads to longer employment tenures — a factor that is very important in a very high turnover industry.



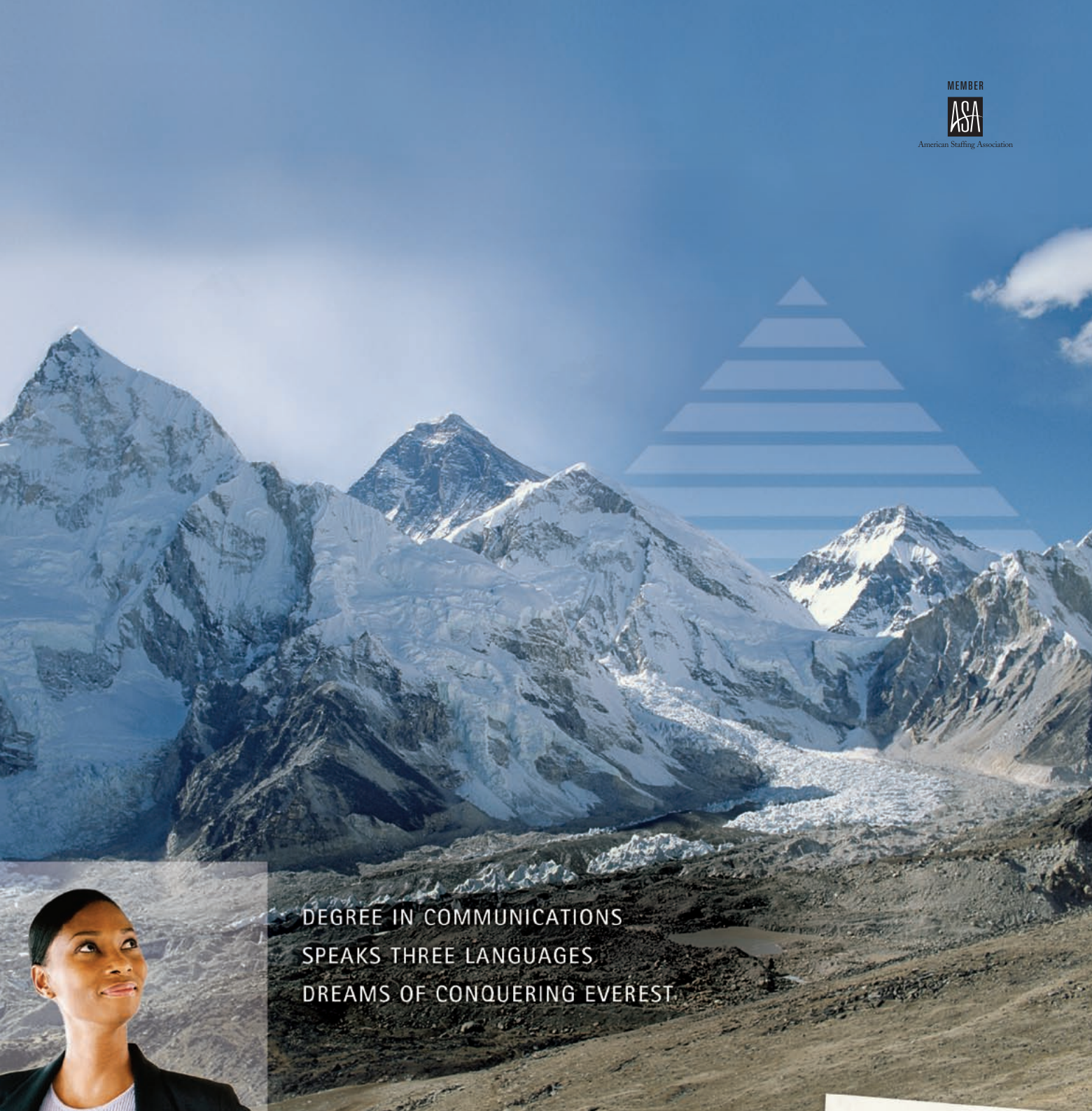
Office space savings may be somewhat offset by other costs in employing at-home agents, including providing the necessary equipment for the agent, such as phones, computers, modems, routers and applications. And the equipment may need some type of storage space during transition to/from employees — although this depends on the way the organization handles the deployment of technology.

Companies looking into deploying an at-home agent model also have other concerns to address before establishing a remote program. Even if a company is increasing its resource pool, it may not necessarily be cheaper from a wage point of view. In fact, depending on the required skill set and the business, there may be a small premium for those better resources. And, of course, that depends on prevailing wage rates where the contact center recruits and retains talent.

The drawback of a lack of physical space in which agents work can be offset by instant messaging and other collaboration tools that make it easier to have agents in remote locations, as with these media, employees are able to interact with co-workers and supervisors.

There certainly are some different challenges that organization needs to address with an at-home agent model. They need to consider how the IT department will support remote applications and train the agents on the applications. This may incur some costs that hadn’t originally been factored into the equation. Other concerns that contact centers need to consider when weighing the





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at-home agent option is legal considerations — ensuring that the company and employee are complying with local/state/government labor laws, safety issues (will the employee need liability insurance?) and protection of company property. In addition, depending on the types of customer contact activities the agent will be engaging in, companies need to consider security and protection of its customer data and information.

Additionally, because the agent is working remotely and the supervisor cannot occasionally walk around and listen in to calls, there needs to be a system in place to very effectively measure agent productivity, provide real-time metrics to ensure the agent is meeting KPIs and a process for monitoring call quality. Companies that deploy the remote agent environment effectively utilize a quality management tool to record calls and assist managers in training at-home agents, using recordings to pinpoint areas for improvement within calls.

They also certainly need to establish a process for building in opportunities for coaching and e-learning to ensure that even though the agent is not on site, he or she is still receiving ongoing training. It is imperative that companies first ensure the appropriate authentication, security and encryption before deploying a remote environment. In many ways, VoIP can be actually more secure than a typical PSTN call. Authentication mechanisms are actually built into SIP and other VoIP-based protocols. User agents, gateways, carriers, and other SIP components may be forced to identify themselves with encrypted passwords, or prompt users to enter password information. The SIP connection is then made, and the voice and data packets are encrypted to ensure that customer information is kept secure.

**Calabrio, Inc. (News - Alert)**  
([www.calabrio.com](http://www.calabrio.com))

**Tim Kraskey, VP of Business Development**

However attractive any remote model may be from a business standpoint, it requires precise planning and design.

#### Here are some risks:

- The network architecture must be manageable and reliable. It must be able to scale from home agent to branch or store front to contact center and voice/data centers.
- Planning is required around best practices and tools for managing virtual teams to ensure quality and adherence to key metrics.

- Applications must allow the network to be truly “virtualized” so the cost levels can be reduced while providing better service.

Successfully addressing these risks enables the technology and training resources to enhance the customer experience and provide consistent service and value.

**VoIP-based systems.** VoIP lifts geography as a barrier on effective communications, enabling workforces to be increasingly distributed.

**Edge-architected solutions.** An “edge” architecture uses the resources of the distributed contact center and leverages the processing power and storage capacity of end-user PCs. For example, quality monitoring that captures and temporarily stores recordings at the edge can be easier for contact centers to deploy and manage. The main benefits include a reduction in the required number of servers, network cost savings and more effective use of techniques such as real-time analytics.

**Simplified suites.** When contact centers implement a suite of configurable packaged products, it becomes easier to support a remote workforce because desktop integration is greatly simplified. Browser-based software eliminates the need to support software on each individual desktop. Changes are made centrally.

**Collaboration tools.** E-learning and other Web-based collaboration tools support team management, coaching and training in a virtual environment.

Contact centers need to realize that simply implementing the technology does not create an operational remote contact center. As customer contact organizations migrate to a remote or virtual environment, companies need to adapt, adjust and manage their people, processes and technology in order to be successful.

With regards to recruiting, with remote contact centers, managers have a much larger pool from which to select, making it easier to hire the right agents with the right expertise.

With training, monitoring performance and coaching, call center applications that are available today make these processes much easier. Training and coaching courses can all be automated and scheduled directly into the agents’ schedules to ensure remote agents have the same development opportunities as those that are located at the contact center.

There are also performance management applications and tools that help agents and

managers understand how they are handling calls. Giving agents access to performance management tools helps them understand how they are doing and enables them to work with their supervisor to more efficiently address any performance issues.

We’re likely to see the number of virtual agents triple in the next three to four years. After slower-than-expected adoption, the IP contact-center market is now growing significantly. IP telephony solutions have matured and awareness of their benefits has increased. More and more contact centers are beginning to understand the benefits of remote agents.

**Cisco (News - Alert)**  
([www.cisco.com](http://www.cisco.com))

**Ross Daniels, Director of Solutions Marketing**

We see customers in all vertical markets being able to take advantage of the benefits of remote agents. The typical resistance we hear from enterprises is that supervisors can’t be as effective in managing agents that do not work in their physical location. This has always seemed a weak excuse, as the variety of workforce management and monitoring tools available to supervisors today make remote supervision easily accomplished. We have also heard of remote/home-based agents creating a backlash from within the traditional agent ranks; agents working within the formal contact center may wonder why they aren’t able to work from a home office. Conversely remote agents may sometimes feel isolated from their peers. Another concern from employers is the security of confidential customer information, including credit card numbers and social security numbers. These are real concerns that must be anticipated and addressed to ensure success with remote agents.

The big leap forward for remote/home agents is the ubiquity of high quality/high bandwidth connections to the branch office or home-based office, and the proliferation of Internet Protocol (IP) for telephony transport in the contact center. These have made remote/home agents much more affordable from a telecom perspective. Web-based customer service (e.g., text chat or e-mail) also presents a strong case for the remote/home agent.

Data security is one of the valid concerns when it comes to the home agent model. The primary method that we have seen for ensuring data security is the use of thin clients (e.g., Citrix) for agent applications. In this model, all data are server-based, and no data reside or remain on the remote agent’s



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PC. In addition, training remote agents to understand the importance of safeguarding customer information becomes even more critical in this environment.

We definitely see this segment of the market growing over the next several years. The economic argument is compelling, and the “social benefits” of expanded labor pools, higher levels of experience for remote agents and reductions in automotive commuting will continue to drive growth in the market. Remote/home agents might make up 50 percent or more of the total contact center agent population in the next 20 years.

**Interactive Intelligence (News - Alert) ([www.inin.com](http://www.inin.com))**

**Tim Passios, Director of Product Marketing**

An advantage of the remote agent model is the ability to address the issue of inadequate labor pools by being able to select from candidates beyond local markets. In addition, by offering more flexible scheduling and the convenience of working from home (including the advantage of gas and other commute-related cost savings), organizations can boost morale and loyalty, thus reducing agent turnover. This also has the side-benefit of reducing organizational costs associated with recruiting, hiring and retraining new agents. Another side benefit is that the reduction in commute-related environmental stressors addresses the increasing pressure from consumers for “eco-friendly” business practices.

Generally speaking, smaller, locally-focused businesses looking to address high-volume, low-value processes won't derive as much benefit from a remote agent model. Two factors that qualify more as concerns than disadvantages, are additional security and supervisory/management measures that must be considered when employing remote agents. Though infrequent, some organizations report that remote agents can occasionally feel isolated or disconnected.

The two main challenges associated with implementing a remote agent model are adapting the business culture and processes, and selecting the right technology. For the latter, it's critical that the technology be capable of real-time remote monitoring (including “status” or presence management) and reporting. Features such as “whisper coaching,” “listen” and screen recording

should be built into the technology solution so that reporting can be done across corporate-based and remote agents, and across multiple communications channels.

More value can typically be obtained from a remote agent model when it's applied to industries with complex, high-value/high-touch processes requiring specialized skill-sets. These might include verticals such as healthcare and retail. Note, however, that suitability of this model hinges on the process type, thus, it has broad horizontal appeal for a subset of an organization's agents involved in high-value processes.

**The early adopters of the remote agent model were the travel industry (Jet Blue Airlines is an oft-mentioned example) and business process outsourcers. However, expect to see the model spreading outward across multiple verticals. In reality, any vertical can benefit from adopting an at-home agent model, especially those industries that require a flexible labor pool and round-the-clock call center coverage.**

A secure VPN for remote network access is one safeguard. Thin-client remote access applications are another. It's also critical that the solution supports TLS/SRTP standards, recording encryption, and encryption beyond user-to-user, such as inbound IVR and ACD, and outbound predictive dialing. Strict password generation requirements and the use of public and private key certificates provide additional security.

Lastly, to ensure remote employees follow appropriate procedures for information confidentiality, organizations should deploy technologies such as live call monitoring, call recording and screen recording.

IP telephony is the primary “enabling” technology for the proliferation of the remote

agent model. Trying to support remote agents using separate voice and data connectivity was extremely complex and expensive. It also resulted in limited functionality. With the right IP telephony solution, organizations today can cost-effectively and easily support remote agents with high-quality, high-capacity transmission and access to the same features available to employees working from the corporate office.

**Transera ([www.transerainc.com](http://www.transerainc.com))**

**Prem Uppaluru (News - Alert), Co-founder and CEO**

In terms of technology, on-demand virtual call centers liberate the brick-and-mortar operations, allowing enterprises to locate their agents onshore, offshore, at home or in remote offices and source their agents as captive employees, outsourced workers or independent contractors at home. As the workforce is virtualized, managing this distributed agent community becomes more challenging. Web-based collaboration and communication tools can help in reuniting distributed agents into a cohesive workforce. Supervisors can use these tools to monitor and measure the quality of customer interactions and agent performance, assist in these interactions if needed and provide ongoing training to the agents. Agents can use these tools to contact other agents, escalate calls to supervisors or connect with knowledge workers. Agents can also use these tools to communicate more effectively with customers by adding voice, video and chat as necessary to meet customer preferences for service. The ability to combine voice and data over a single communications line has profound implications for the contact center industry. This technology foundation gave rise to the virtual contact center model.

Financial services, travel and hospitality and retail industries have been some of the first to adopt the remote agent model. We are also seeing adoption in the healthcare industry with nurses on call. Finally, the technology sector leverages virtual contact centers for technical support. In reality, any business can benefit from the remote agent model.

The biggest concern with any call center is customer privacy. This holds true for companies employing the remote agent model. Fortunately, there are technologies and systems to address this. For example,



companies can provide their remote agents with PCs that are not equipped with hard-drives or business applications, including Word, Excel or PowerPoint. In addition, virtual contact center solutions can implement either Secure HTTP or IPsec VPN to access on-demand call center solutions. Finally, there are a variety of powerful Data Loss Prevention solutions to track where and how data is used so it isn't compromised.

### VIPDesk ([www.vipdesk.com](http://www.vipdesk.com))

**Mary Naylor (News - Alert),**  
CEO and Founder

In terms of the size of the current home agent pool, recent figure of 400,000 could include all telecommuters working in the industry, and might also include managers, supervisors and other positions.

There's a huge level of excitement and interest in the home-based model, even though it's been around for 10 years. But today, you're really starting to see the Fortune 500 and the high-end premium brands starting to put their toes in the water, and they're embracing the model.

One of the key drivers is the quality of the customer experience. The other big challenge that a lot of these [outsourcing] companies are facing is that they're all tapped out — with a traditional outsourced contact center, typically you've got a 50 or 60 miles radius to draw from for your recruiting. And this can be in an area where you have other premium brands and Fortune 1000 companies that are also operating call centers in the area, so you just end up maxing out on your labor pool. So now, with the home-based model, you have a national labor pool to draw on. Thus you have the ability to bring on the people with the skill sets you really need. For example, you could look for people who are enthusiasts in, for example jewelry or golfing, which would provide you with the skill sets you really need.

There's some backlash from off-shoring — and there's some challenges in the traditional bricks and mortar — so "homeshoring," home-based or virtual, or whatever it's called, is a really nice alternative that sits on the continuum of traditional bricks and mortar on one end and offshoring on the other. We sit right in the middle and we blend the best of both worlds. You get the great econom-

ics you get from offshoring, but at the same time you get superior quality. You also get high retention rates, which cuts down on the cost of recruiting and training. That in itself helps drive costs down. And then there's the cost of real estate, and the infrastructure, of all the cubes and computers and parking spaces.

A big advantage is the retention rate. Every client benefits from this. Retention rates [among home agents] range from 85 to 90 percent, whereas at a traditional all center the turnover rates can be 25 or 30 percent, and as high as 100 percent. The demographics of the agents are far superior: Our average age is 40. We've got 75 percent with a college education, five percent with graduate degrees, 42 percent speak a second language, more than 30 percent have management experience. [In a traditional contact center,] you're talking about an average age of about 22 for the average worker. So you're starting with a more mature and stable worker whom you don't have to teach how to work. Home agents tend to be more mature, higher caliber, more savvy, more worldly — and that translates into a superior customer experience. We've seen customer satisfaction scores and tone of service scores increase by as much as 40 percent, and here I'm going to give you some case study info: average order size has increased 30 percent and spending is up 50 percent, so it translates into metrics of increased order size, increased schedule adherence, increases in quality scores and an overall increase in customer satisfaction.

The other advantage lies in disaster recovery and business continuity. This is really critical. If you have a center that's in Florida and it goes out, well, with this remote agent model, we have people all over the U.S. and Canada. So it's very easy to move. Plus, you have cost savings through the infrastructure — it saves around \$5,000 per year per seat, just to give you some sense.

*Recruiting is done via a variety of methods.* Predominantly, it's referrals — it's also public relations, a story that gets picked up that we're hiring — and it's traditional job postings, including Monster and CareerBuilder. But interestingly, depending on the client, we might go to any number of industry specific enthusiast type sites — whether its fashion, jewelry boards, message board — and believe it or not, there is an incredible community of stay-at-home

workers who are on all kinds of message boards and forums, so it is very important that they're able to communicate and talk about a company, and the word of mouth is quite something. We've been mentioned on a couple of TV shows, and we've seen thousands of applications come in within a two-hour time frame after being mentioned.

### West Corp. (News - Alert) ([www.west.com](http://www.west.com))

There are many advantages to the remote agent model:

**Higher quality agents.** In general, companies are able to attract a more educated, more experienced agent in the remote agent model. In fact, over 80 percent of West at Home agents have some form of college education compared to only 34 percent in traditional brick and mortar call centers. These higher quality agents help increase sales conversions by 15 percent and provide a 10 percent increase in quality against key performance indicators (KPIs).

**Greater staffing flexibility.** The West at Home program allows us to schedule agents in half-hour increments — something that cannot be achieved in a brick-and-mortar environment. This scheduling flexibility allows us to flex up or down by more than 100 percent, based on fluctuating call volume needs.

Reduced costs and improved productivity. Through the use of remote agents, companies will see on average a 10 to 15 percent reduction in call center costs versus traditional call center agents. Because West at Home's remote agents are better educated and highly motivated, they are generally more productive compared to traditional call center agents. **CIS**

#### The following companies assisted in the preparation of this article:

**Aspect Software** ([www.aspect.com](http://www.aspect.com))

**Calabrio, Inc.** ([www.calabrio.com](http://www.calabrio.com))

**Cisco** ([www.cisco.com](http://www.cisco.com))

**Interactive Intelligence**  
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**Transera Inc.**  
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**VIPDesk** ([www.vipdesk.com](http://www.vipdesk.com))

**West Corp.** ([www.westathome.com](http://www.westathome.com))



By Rick Reiman,  
Product Marketing Manager,  
TeleDirect International, Inc.

Innovative Solutions From The Workforce Development Experts

# Leveraging Contact Center Technologies To Optimize Your Business

Highly productive agents, minimal employee turnover and well-defined processes are just a few of the factors that tend to separate a successful contact center from an unsuccessful one. However, by leveraging the right technology, your business can maximize revenue and improve agent performance and productivity. In this article, I will share with you four technology-enabled best practices that will help you drive your business to new levels of success!

## Best Practice #1: Move to a blended agent environment for maximum efficiency.

The most efficient call centers train their agents to handle both inbound and outbound calls. This allows supervisors to better balance staffing levels based on call volume. For example, your agents can conduct outbound campaigns to generate sales as their primary responsibility, while also receiving incoming customer service calls. This allows the agent to convert routine, inbound customer service calls to revenue-generating interactions ("As you requested, I have updated your mailing address. By the way, have you heard about our new product?"). From a technology perspective, managing a blended agent environment is easier facilitated if your system 1) allows for the same agent desktop for both inbound/outbound activity; and 2) monitors call volume and automatically switches agents between outbound and inbound campaigns (based on business rules that you define). Automatic call blending increases contact center efficiency and removes the supervisor from the time-consuming task of monitoring call activity and manually moving agents between campaigns.

## Best Practice #2: Maximize agent productivity with a unified desktop.

A unified desktop provides a single, integrated interface to all enterprise and external applications that agents typically make use of during a call. The unified desktop manages key supporting systems such as scripted sales and service workflows, an objections/rebuttals knowledgebase, payment processing and a customer interaction history that shows prior interactions, activities and additional profiling and context. The results are dramatic productivity gains for both the agent and the company:

**Dramatically reduce training time.** By deploying the same interface to handle every type of interaction, agents don't have to be trained on different systems. Imagine the savings from streamlining agent activity — rather than making a call, then entering a different system to process a credit card or transaction, and then returning to the voice-based system to handle phone calls — a unified desktop incorporates all these functions. Whichever application the agent needs is always available right on their desktop. This improves efficiency by reducing training ramp-up and average handle time. Embedding external applications in the agent desktop allows agents to remain within the flow of the call, reducing distractions and eliminating manual processes.

**Reinforce your desired culture and sales behavior.** A well-designed unified desktop allows you to reinforce the desired sales behavior in the contact center by showing individual and team performance against sales or service key performance indicators (KPIs). Reinforcing the expected behavior via the desktop and measuring results for each individual will help create a culture of accountability. When you combine desktop "real-time statistics" with a solid quality monitoring/coaching and recording solution, you have set the proper expectations for your agents to be measured and developed.

**"De-pulp" your contact center.** Do this by making all relevant documents, policies, procedures and "paper-based" knowledge available within the agent desktop. Anything that an agent might track manually via "sticky notes" — product information, callback commitments, company policies and procedures — should be available electronically. Training time and onboarding of new agents can be reduced from weeks to just a few hours!

**Position your agents to maximize each customer interaction.** Another feature offered by more advanced agent desktop platforms is context-sensitive upsell and cross-sell scripts that can be set to automatically prompt the agent when a cross-sell or upsell opportunity arises. For example, the system may prompt an agent if the customer's current product coincides with the availability of a relevant upgrade, and can be sold as an add-on.

Deploying a unified agent desktop is one of the most critical initiatives you can implement to align your sales workflow with your company's business goals.

## Best Practice #3: Implement "closed-loop coaching" to reinforce a results-driven culture.

Motivating and training agents on a consistent day-to-day basis is one of the biggest challenges most contact center managers face. Implementing a closed-loop performance measurement solution is one of the most effective ways to promote a culture of success. When every agent knows they are measured by the same criteria as their peers, and those measurements are updated and communicated in real time, you are on your way to building a winning culture. By defining performance standards, measuring agent's adherence to these standards, providing honest objective feedback to the agents, and then continually reinforcing the measurement/coaching process, you create a "closed-loop" coaching system that allows you to maximize agent performance.

Some tools you can use to communicate and reinforce agent performance include:

**Agent evaluations and scorecarding.** Rating agents based on defined performance standards allows you to laser-target areas



for improvement. Several companies provide tools that automate the evaluation and coaching process, allowing supervisors to evaluate agent call and screen recordings compared to established KPIs and provide immediate feedback to the agent. These tools also incorporate external data points (ACD, payroll, schedules, sales results) to help create a comprehensive view of agent performance. Agent scorecards, presented in a constructive coaching session, are a critical tool in the closed-loop coaching process.

**Post-call surveys.** Many companies survey customers via various media—outbound phone, e-mail, direct mail, Web. Each of these methods has limitations. For example, direct mail is inexpensive but not very useful, as the feedback occurs too long after the interaction that you are trying to measure. E-mail surveys are easy for a customer to ignore, reducing response rates. For the most timely and accurate measurements, automated post-call surveys are ideal for obtaining immediate feedback tied to the specific incident and agent. The customer is invited to participate in the survey sometime during the call and if they agree, at the end of the agent interaction they are prompted by a series of questions and can respond via IVR. Results are available immediately, and can be continually measured to track changes over time. The data collected can be used as a component of agent performance measurement, but can also reveal root-cause issues and help determine customer satisfaction levels.

**Real-time performance statistics.** Some call center technology platforms offer a real-time statistics feature that shows the agent their daily performance statistics between every call so they know exactly where they stand for that day.

#### **Best Practice #4: Deploy strategic call recording and analytics to identify the most effective sales strategies.**

Gaining a competitive advantage in your contact center involves more than just analyzing basic metrics. Most contact centers record customer/agent conversations for compliance and training purposes. These recorded customer interactions are valuable sources of information about your customers' needs, competition, how your company is perceived, and how your agents close (or don't close) sales. However, it's not practical to play back thousands of hours of recordings, so analyzing these data with any degree of accuracy or efficiency is difficult. Speech analytics, one of the most exciting recent developments in call center technology, helps you extract meaningful knowledge from these recordings.

Speech analytics technology first became available a few years ago and customer adoption of these tools has accelerated rapidly. Speech analytics monitors customer-agent conversations to spot key words or phrases, evaluating factors such as inflection, phonetics, emotion and periods of silence. This allows supervisors to determine which

strategies result in the best closing rates, to quantify what objections occur most often (and what works best to overcome those objections). Identifying those "moments of truth" that can make or break a sale is one of the most valuable benefits of implementing analytics technology. Another key benefit of speech analytics is the ability to more efficiently pinpoint specific areas where agents need more training, without supervisors having to sift through volumes of calls to identify problem areas.

An emerging development in this area is analyzing Web, e-mail and chat interactions in addition to voice to produce cluster maps and trend graphs to identify customer trends. As these products are introduced and the technology perfected, managers will be able to obtain an all-inclusive view of customer interactions with your organization.

Effectively implementing each of our suggested best practices provides an organization a winning "recipe" of sales and service process optimization, while developing your contact center workforce. If you have chosen the right technology platform to "engine" these initiatives, you will have the data and feedback mechanisms in place to dramatically improve your results!

*For more information about TeleDirect (News - Alert), visit [www.tdirect.com](http://www.tdirect.com).*

## **Fairness: An Underestimated Principle In The Call Center**

*By Tracey E. Schelmetic, Editorial Director, Customer Interaction Solutions*

As a call center manager or supervisor, you may pride yourself on your fairness. You understand that treating agents with an evenhanded and equal approach is important. However, it's not your perception that matters: it's your agents' ideas about what is fair that matters. If your call center agent pool is comprised of mature adults with long careers behind them, thick skins and a high degree of tolerance for criticism, then you are fortunate. However, chances are, you employ a lot of young people who may be new to a workplace environment, particularly one where a workforce is almost literally elbow-to-elbow, as in the call center.

The causes of high turnover in the call center are not always clear-cut to company management. Sure, you understand why an employee quits if he complains that he's not getting the shifts he wants or is offered more money by another company. But more often than not, it is soft, intangible things that cause friction in the call center. Agents feel their goals are poorly communicated and measured. That another agent was trained better than him or her. That supervisors always choose to monitor on the agent's "bad" days while ignoring the good conversations. That supervisors are keeping a closer watch on him or her than other agents. That company management is stressing training on issues the employee feels he or she has already mastered, while skimping on areas the agent would truly like help in (but is unwilling to ask).

Today's call center technologies go a long way toward creating and maintaining fairness in agents' jobs. Workforce optimization solutions allow for schedule and vacation swapping that is done automatically based on seniority, coverage needs and who asked first rather than supervisors picking and choosing who gets the good schedules and who doesn't, which tends to bring about accusations of "favoritism."

Quality surveys of customers can be done randomly, helping catch a more representative range of opinions. It's well known that in the contact center, if you leave it up to customers to decide when they want to offer feedback, they are generally going to take time to offer it only when they've had a negative experience. And if you allow agents to "push" surveys to customers, they are, of course, only going to "push" when a call has gone well.

Speech analytics, too, can help supervisors become aware of where agents really need help, and where they are strong. Supervisors can take steps to correct errors — or areas where training may be thin for certain agents — automatically by pushing the appropriate e-learning modules to call center agents, allowing them to learn at their desks during their downtime with no judgmental manager standing over them. In this way, a supervisor need not either publicly single out an agent for a problem; i.e., "Suzanne, you really need to improve your close rate," or take the time out to pull the agent aside for private, individualized learning, which carries its own stigma.

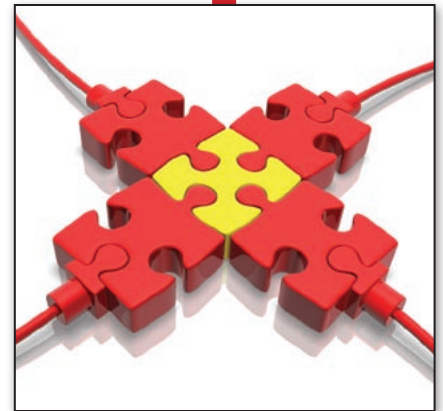
Call recording allows you to record and store all of your agents' calls, if necessary, and access them easily. Not only do many industries today require 100 percent recording of customer interactions, it can be a good idea to avoid agent/customer "he said, she said" scenarios. You can use the recordings to find out where agents are weak, but on the flip side, you can use the recording to let agents know what they are doing well.

Improving the perception (and the reality) of fairness in the call center can go a long way toward reducing agent attrition and nipping the "disgruntled agent snowball effect" in the bud before it blooms into resentment of company management. Because when a group of people is working in a call center environment, disharmony is the very last thing that's needed.



# Making The Complex Simple: Efficient And Effective Contact Center Growth

In an ideal world, contact centers would run with clockwork predictability. Calls would come in with perfect regularity, and omniscient agents would answer every inquiry quickly and accurately. The real world is a much more complicated place, with customers who have complex needs which rarely fit into just one or two neat categories. Of course, your customers have little sympathy for your travails. They expect a quality experience each and every time they reach out to your agents. Your challenge is to keep the complexities of your contact center from becoming a fragmented, disjointed collection of ringing phones, ensuring that each connection is a productive, satisfying one for both the customer and the agent.



## Transforming The Operation

Running away from complexity is not an option — being successful requires sophistication, and sophistication requires diversity, flexibility and a wide base of knowledge. But complexity need not be complicated. The diverse needs of your customers and the demands of your company's range of products and services can be brought under control to create a contact center that is both effective and optimized. Bell Canada Holdings is just one of many companies which has committed to transforming a fragmented, complicated operation into an optimized, multi-functional contact center, after recognizing the inefficiencies of functional silos.

Callers expect three things from your organization — to be helped promptly, knowledgeably and passionately. Fail to deliver on these expectations, and you risk sacrificing your entire brand image in your customers' eyes. Therefore, it is imperative to keep complexity from sabotaging your ability to deliver a quality customer experience. Quality is meaningless without consistency, and a diverse contact center cannot deliver consistency without the ability to accurately assess the past and build operational forecasts for the future.

## Workforce Management: The Cornerstone Of A Successful Operation

Just as a tiny stone in the center of a pond can ripple all the way to the banks, minor scheduling inefficiencies can sink a contact center's operational plan. A robust work-

force management solution should be at the heart of the forecasting process, but it is equally important to ensure efficiency in the workforce management function itself. Bell Canada (*News - Alert*) recognized that it had 50 workforce management staff scattered across 15 offices, each focused on different contact centers in stand-alone lines of business and each using a different set of planning tools. By better defining the workforce management role and introducing a uniform set of tools and procedures, Bell Canada transformed its WFM jobs. Rather than relying on manual labor and guesswork, Bell Canada's workforce planners now have crucial, up-to-the-minute insight into the state of the company's agent workforce and call demand, leading to more accurate plans and better intraday changes.

## Focus On Key Customer Demands

Once your forecast and schedule delivery processes are up to speed, you can focus on the three key customer demands. The first, speedy service, starts with an accurate forecast. Depending on the size of the organization and the expectations of your customers, missing by as few as two agents can significantly undermine your service levels. To make those forecasts work, however, the workforce must be scheduled properly. Specifically, effective scheduling can include flexible and rolling shift starts and stops, staggered breaks and lunches, and the ability to quickly transition agents from off-queue activities such as training and post-call work back to live caller interaction. Adherence monitoring helps ensure that agents are truly

contributing in the way the plan expects. Those are not characteristics of a simple contact center, but with the right processes and technology in place, implementing them will make achieving your goals easier.

## Make The Agent Experience More Predictable

Like many companies, Bell Canada had to manage agent anxieties as it migrated to longer hours of operation with more flexible scheduling and an increased focus on adherence. The key to securing agent buy-in was emphasizing that clearly defined scheduling is not used to complicate lives and monitor employees, but to make the agent experience more predictable and productive, with efficient windows for activities such as training and coaching which would minimize disruption by taking place during off-peak periods. Bell Canada also gained agent trust by pointing out that its new workforce management solutions enabled performance metrics to be analyzed more accurately from live results and objective peer group assessments.

Your agents may not all work under the same roof. Labor pool limitations, language requirements, hours of operation, acquisitions and a host of other reasons make it expedient for many companies to operate more than one contact center. Although it may seem simpler to operate each facility as an island, the fact of the matter is that an integrated, multisite contact operation makes far better use of available resources.

Operating with fewer call queues, but a unified pool of agents, gets customers to the best





representative for the task at hand with the smallest amount of delay and fuss, regardless of location and without requiring clients to memorize a laundry list of contact numbers and different hours of operation.

Bell Canada's requirements for multi-language operation and its wide customer footprint make multisite operation a natural choice. Even as it recently tightened up the linkages between its several contact centers in Ontario and Quebec, Bell Canada was able to identify opportunities to consolidate some locations. By sharing call volumes among the remaining centers, Bell Canada can address all callers better and faster, whether they are repeat callers with a long-standing issue, or a "zero-out" caller who simply needs a quick fact from a helpful agent.

### A Positive Customer Experience Requires Knowledgeable Staff

Accurate forecasting and multisite coordination can get a live voice on the line promptly, but without a knowledgeable agent, the customer experience falls short. Proper scheduling requires the right staff to execute the plan, and contact center agents can no longer be treated as completely interchangeable parts cut from the same mold. Customers are more demanding than ever, and the growth of self-help tools, IVRs and online research mean that someone picking up the phone to call your organization may well have a very complex issue — and asking customers to simplify their requests is not an option.

It is not enough to merely anticipate the breadth of your customers' needs. You must also grasp which agents within your organization are best suited to handle each call type. Building your operations around multiskilled agents allows the most efficient use of each active seat, permitting you to take advantage of the primary and secondary skills of your agents and route calls to the most appropriate agent to handle each call. This ensures both higher agent productivity, and greater customer satisfaction.

### Using Workforce Management To Develop Multiskilled Agents

In order to ensure the best available agent knowledge, training must evolve as well. Used to its fullest potential, workforce management can be used in the development of multiskilled agent training plans, with just-in-time modules available directly at the agent's desktop, at the appropriate schedule interval. Managers and agents can work to-

gether to review organizational needs, quality monitoring and performance management scores and create appropriate skill development tracks for the agents. Mastery of a new subject area can be easily incorporated in future multiskill scheduling plans, creating new opportunities to deliver the best service experience possible to each customer. Bell Canada found a significant improvement in agent satisfaction when it changed from frantic, hurried training sessions which pulled agents off the queue with little to no warning to clearly scheduled training times, complete with interactive pop-up reminders.

**The final component of a quality experience is a passionate workforce, starting with motivated and responsive agents. There are a number of intangibles in employee relations, from parking spaces to overhead lighting, but workforce management can play a significant role in tangibly improving an agent's quality of life, and by extension his or her investment in exceeding customer expectations.**

### Empower Agents With Self-Service Tools

The final component of a quality experience is a passionate workforce, starting with motivated and responsive agents. There are a number of intangibles in employee relations, from parking spaces to overhead lighting, but workforce management can play a significant role in tangibly improving an agent's quality of life, and by extension his or her investment in exceeding customer expectations. Some companies have made the mistake of allowing complex operating procedures to bury the needs of their agents, stripping them of any voice in scheduling and planning and making them feel like a disposable cog.

Instead, embrace the possibilities a more sophisticated contact center presents. Advanced

operating platforms open up new possibilities for clear communication and disclosure, along with enhanced schedule bidding, time-off requests which are governed by consistent and fair rules, and opportunities for early departure and overtime which can be quickly communicated to the entire agent population. Self-service tools used for schedule bidding, preference changes and intraday alerts significantly empower your agents, which creates a work environment they help control, rather than simply react to. Agents with ownership of their work environment can focus better on the job at hand, a quality customers notice.

### Achieve Tangible Results

After its workforce management overhaul, Bell Canada can now provide its agents with schedules three weeks in advance, a step up from the uneven days of old when schedules were provided as little as one week out. The company also provides a detailed performance metrics portal for agents so they can view their own performance and that of their team in real-time, rather than rely on infrequent and incomplete statistical handouts. The clear, concise scorecards and reporting make agent self-correction and peer motivation easier, as well as making the role of coaching and supervisory advice clearer.

Whether it is corporate performance, competitive pressures, or merger activity fueling the expanding needs of your contact center, change and growth should not be feared. Change is never simple, but it can be rewarding—Bell Canada's contact center transformation has produced a long-term ROI of over \$4 million. By putting your depth and breadth to work for your customers, you can build a contact organization that is the envy of your rivals and a true asset in the eyes of both customers and the executive board. **CIS**

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## Case Study: Nobel Peace Prize Winner's Mission Gets Help From Pitney Bowes' Customer Communication Management

**F**ounded by Muhammad Yunus, the 2006 Nobel Peace Prize Winner, Grameen Bank has created a new category of banking by granting millions of small loans to poor people with no collateral. While originally established as a village bank (Grameen in the local language means Village), Grameen Bank has since lent more than \$5.1 billion to 5.3 million people.

Subsequently, Grameen Bank teamed with Norway's Telenor communications company to provide phone services to rural areas. The organization born of the joint venture, Grameenphone ([News - Alert](#)) Ltd., developed a program through which poor women in rural villages could buy cell phones with a loan from the bank and then sell the use of them on a per-call basis. Through the program, Grameenphone has become one of Telenor's ([News - Alert](#)) fastest-growing markets. This truly reflected a social business enterprise – and the only one of its kind in the world.

As a result of its growth, Grameenphone recently found that its customer base had grown dramatically within a short period of time and the company's IT systems were unable to provide the customer service and internal integration Grameenphone demanded. In a span of three years, the organization moved from one million to more than 10 million customers. With eight million additional rural customers, Grameenphone has faced a considerable challenge to effectively communicate with such a large, broad array of customers. In addition, the existing payment collection was unable to communicate using modern means (i.e., e-mail) and could not provide local language support or on-demand customer service.

Grameenphone deployed a Customer Communication Management (CCM ([News - Alert](#))) solution from Pitney Bowes Group 1 Software to enable it to add value to its entire CCM value chain. The solution also provided seamless integration between Grameenphone's billing, CRM and data warehouse systems.

### The Problem To Be Solved

Grameenphone's payment collection system was unable to match the needs of such a rapidly growing and diverse customer base. There was an

additional need to present invoices with interactive marketing capabilities. Unlike developed countries, the region's average revenue per user (ARPU) is among the lowest in the world at a mere six to seven U.S. dollars. Thus, resource optimization has been critical to remain profitable.

Grameenphone's customer service organization lacked an "exact replica" view of invoices, leading to higher service costs and customer dissatisfaction. The previous system was unable to communicate using modern means (like e-mail) and could not provide local language support or on-demand customer service. The key project objectives were to relieve the business pain areas and provide Grameenphone with the ability to manage its own systems without external dependencies. Seamless integration with Grameenphone's billing, CRM, data warehouse systems and stringent internal compliance was required. The solution also had to be based on service-oriented architecture to provide for Web services and XML support for future proofing.

### The Solution

To achieve this, Grameenphone partnered with Pitney Bowes Group 1 Software ([News - Alert](#)), which offered a comprehensive Customer Communication Management (CCM) solution set. The entire project, from requirements gathering and analysis to final implementation and go-live, was managed between the months of August and November 2006. Given the short timeframe, Grameenphone's team worked with Pitney Bowes Group 1's team over most weekends.

### Achievements And Metrics

The Pitney Bowes Group 1 solution met Grameenphone's challenges, including managing the electronic and physical communication of the subscribers in both remote villages and urban areas. With particular attention on



the villages, Pitney Bowes Group 1 crafted a solution to maximize Grameenphone's current asset reuse in terms of existing people, applications, printers and other hardware and provided local language support. The focus of the entire solution was on how to add value in Grameenphone's entire CCM value chain.

The implementation accomplished the following:

1. Sixty percent positive customer feedback on new "English" invoices. Grameenphone expects positive feedback to grow as customers adjust to the process change.
2. Fast access to two years of exact replica documents. CSRs that were limited by access to only one year of historic data (not an exact replica), are now enjoying access to two years of exact replica data within seconds. And the system is easily scalable, with the only constraint being hardware.
3. Faster fetching of itemized details per customer. Fetching time for CSRs has been reduced from 20 seconds to under three seconds.
4. Corporate summary sheet creation was previously a manual activity that took up to several days for each report. The current system automatically provides corporate summaries along with the rest of the invoices.
5. Local language invoicing implementation completed within days. Implementation of local language invoicing would earlier been extremely costly and time consuming, and would require several months of work. As the system became operational in November 2006, additional metrics are still being captured.

Group 1 Software, a 25-year veteran of customer communication management software, has been part of Pitney Bowes since 2004. For more information about CCM, visit [www.g1.com](http://www.g1.com). **CIS**





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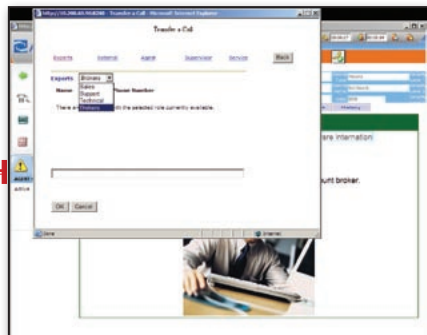
## Microsoft's Call Center Push

**T**here is a level of excitement in the call center space I haven't witnessed since VoIP began transforming the call center into the contact center. Over the years, we have seen technology after technology change the way contact centers work, and we are at the point today where IP communications affords us the opportunity to distribute call centers and agents at will.

But VoIP seems so yesterday. The latest revolution to come to contact centers is unified communications. I recently wrote about how Aspect introduced a unified communications platform that will allow call centers to increase service, sales and first call resolution levels. (See [www.tmcnet.com/1853.1](http://www.tmcnet.com/1853.1))

Just a few days after my article appeared, Microsoft decided to invest in Aspect and, moreover, the two companies decided it made sense to collaborate on a suite of contact center solutions integrating the best of Microsoft OCS and Aspect's UC solutions. (See [www.tmcnet.com/1854.1](http://www.tmcnet.com/1854.1))

In an interview with Mike Sheridan, SVP of Strategy for Aspect, and Microsoft's Clint Patterson, Director of PR for Unified Communications ([News - Alert](#)), I had a chance to learn more about this agreement between the operating system and contact center software leaders. The duo believe that the synergies afforded by this collaboration will be great. They view it as transformational — they see peoples' lives improving because of better call center service levels.



While on the surface it is easy to dismiss such comments as "PR speak," one of the most frustrating experiences many of us deal with on a regular basis is communication with rock-bottom contact center agents who are still digging. An improvement of even a few percentage points in customer service quality will likely make our lives a bit easier.

The two companies have entered a five-year agreement that encompasses a collaborative roadmap between Aspect Unified IP and OCS. Microsoft will help improve the UC readiness of Aspect solutions and, in addition, will support sales and systems integration efforts, which will include an SI practice whose goal it will be to ensure end-to-end UC for contact centers. There are also significant go-to-market initiatives as part of this agreement such as PR, marketing and distribution of customer success stories.

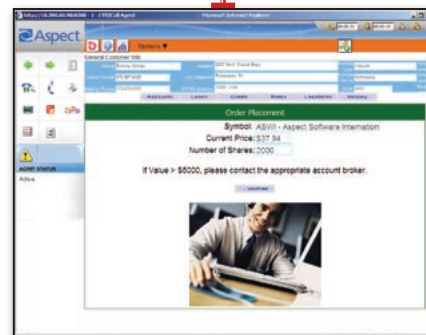
I asked Clint Patterson how this agreement differs from the relationship with Nortel. One of the first differences is that Nortel did not receive an equity investment. In addition, Patterson was quick to point out that the agreement with Nortel is much more broad, while Aspect's partnership is laser-focused on the contact center.

I naturally was curious about how the TellMe acquisition (see [www.tmcnet.com/1855.1](http://www.tmcnet.com/1855.1)) fits into this overall Aspect relationship, and Patterson explained that there are great synergies between the hosted speech services company and Aspects' solutions. It will be great to see what comes of such collaboration.

Some of our discussion focused on CEBP (communication enhanced/enabled business processes) and how call centers seem to be ideally suited to such integration. In addition, Sheridan was quick to point out the synergies between presence in the contact center and the rest of an organization.

Our conversation quickly led to the fact that some call center managers complain that IM is actually a distraction and presence-enabled solutions such as skills-based presence and collaboration help make contact center agents more productive.

Over the next few years, we can expect closer ties between the companies' products, and by 2010, we can look forward to Aspect solutions that fully leverage the OCS voice media server, which allows the full conferencing and communications facilities of this server to come into play



So is Microsoft's commitment to the contact center for real? According to Patterson, "The power of UC is most demonstrably and tangibly felt in the contact center. It's one of those places where UC is a no-brainer." I guess we settled that question.

For me, this agreement brings back memories of watching the new Aspect get built with some of the best technology the contact center market had to offer. Companies like PakNetX, CellIT, Melita and Rockwell Electronic Commerce are all part of the new Aspect Software, and now the company has reached a level in the market where they have become a strategic partner to Microsoft.

I have to commend the Aspect management team for getting the company to this point and, moreover, Microsoft deserves a great deal of credit for making an investment and by doing so developing a great relationship with the premiere call center company in the market.

The installed base of Aspect customers is so vast that this agreement should pay back both companies for many years to come. Of course, this news puts competitive pressure on Cisco, Avaya and Nortel. Aspect has forged a relationship that gives the company as much clout as Cisco, and it also has a suite of software solutions that are more elaborate than those of most of the major enterprise communications companies.

It will be interesting to see what other alliances are developed in the market as a result of this one.

If you are in the contact center business and you thought you were done upgrading the technology in your center, guess again. It is now time to get back in the game and start figuring out new ways to delight your customers, and improve sales and service levels.

One final and important point is that Aspect just may be using Microsoft's telephony solutions in a few years. If Microsoft's solutions are good enough for contact centers, they are likely good enough for any enterprise application. This may not be great news, however, for some of the PBX players in the market. **CIS**

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# Tips for Judicious Selection Of Contact Center Solutions For SMBs

**I**t's no secret that catering to the needs of small to medium-sized businesses (SMB) is a growth area for providers of contact center solutions and services. Though these smaller companies' end goals are the same as those of large companies (multichannel integration, effective CRM, the most efficient call routing, first-call resolution, customer self-help), their unique needs are different, as are the ways in which it makes sense for them to purchase, implement and run these solutions.



One mistake smaller companies need to avoid is bogging themselves down — confusing their employees in the process and lessening the likelihood the solutions will be used — with features they don't need. Many smaller companies, unsure from the get-go what their actual requirements are, become distracted by “cool” features, only to realize later they've paid for extras that nobody wanted and no one actually uses, despite expensive and time-wasting training on these features.

IP telephony and software-as-a-service solutions have been the greatest two factors in equalizing the playing field between large enterprises and smaller companies. Before these factors, SMBs were completely shut out from technologies from which they could gain a lot of benefits but just didn't have the capital to lay out to purchase and maintain the solutions.

The good news is that nearly every sexy technology that has been available to large companies in years past: speech recognition, IP contact center solutions, call recording, analytics, skills-based routing, customer self-help solutions and CRM, is now available to smaller companies. In fact, the marketplace has been paying so much attention to SMBs as of late, these companies may feel they went from a lack of choice just a few years ago to too many choices today.

To help SMBs and their call centers choose wisely, we asked several companies — all experienced providers of contact center solutions to smaller companies — for helpful tips and guidelines that SMBs shopping for technologies and services for their call centers should keep in mind.

## CosmoCom (News - Alert)

### Stephen R. Kowarsky, Executive Vice President and Co-founder

When selecting a contact center platform, it is important to ask yourself and your prospective vendors some basic questions to ensure that your investment works for you now and in the future. Here are just a few things to keep in mind:

- Does the product offer a complete, consolidated solution for all of your call center's needs, so there is no need to buy multiple point solutions from different vendors and integrate them together via CTI middleware and a costly professional services project?
- Does the vendor support all channels — including voice, video, Web chat and e-mail — into the call center in a unified fashion using common business rules?
- Can the solution easily integrate with third-party business applications like CRM?
- How scalable is the technology — can it scale gracefully as your business grows?
- Is the technology location independent and flexible enough to support workers anywhere in your organization, including multiple locations, home workers and even outsourcers?
- Does the solution enable location-independent reporting, supervision and management, regardless of where the agents are?
- Is it a software solution that works on readily-available standard hardware, or does it require expensive proprietary equipment?
- Is the solution available in both hosted and premise-based (CPE) forms?

## Five9

### Tracy Tufillaro, Vice President of Marketing

Choosing a technology provider can be a challenge and a chore. For SMBs shaped by speed, flexibility and customer demand, the selection process offers a focused time-out to assess the capabilities and competitive edge of the firm. Many SMBs use informal methods and low-cost tools to run their business. Others use installed systems that are not keeping up with changes in their business environments. Whether the contact center scenario is green-field or replacement, SMBs should search for a solution provider that is aligned with their vision, business goals and pace for change.

To find this provider, the SMB needs to develop criteria for selection that balances customer needs, business practices and operational goals. Within this framework, the SMB can identify several options for evaluation and engage in discussions with vendors.

Vendors that offer fast, affordable and easy-to-use solutions, in bite-size chunks over time — should be attractive. Through a subscription service, these vendors can provide access to new technology that is updated and refreshed on a regular basis. As the SMB business grows and changes, the aligned contact center solution adapts to the new conditions. What remains constant is a positive customer experience with the SMB.

## Interactive Intelligence

### Ralph Manno, Vice President of North American SMB Sales

SMBs have many of the same communications technology needs as their larger enterprise counterparts, however they typically must meet these needs with a smaller budget and fewer resources.



As a result, SMBs should look for communications solutions that are easy to deploy, manage, administer and customize. Solutions that offer these attributes increasingly come in the form of "all-in-one" suites versus "point" products. These suites reduce cost and complexity by reducing equipment requirements and integration, and eliminating multiple interfaces for administration, customization and reporting. With faster start-up, these solutions also offer faster ROI — a key point of interest for SMBs.

Another important selection criterion for SMBs is the solution's ability to grow. Solutions that are software-based and built in a modular fashion so applications can be added with simple license purchases protect against costly forklift upgrades in the future.

Due to their price-sensitivity, SMBs should also explore hosted (software-as-a-service or SaaS) and managed options. A key selection criterion for SaaS offerings is their ability to be brought in-house to support growing SMBs without a total application re-write.

Finally, SMBs should look for solutions from vendors that demonstrate responsiveness. SMBs typically can't compete for attention based on brand recognition, so they must be sure that the vendor they select has a proven track record of accessibility and adaptability regardless of the size of the customer.

## SugarCRM

**Chris Harrick, Senior Director, Product Marketing**

The rise of the Internet as a channel for evaluating and purchasing software, coupled with a shaky economy, gives contact center buyers in small to medium-sized organizations more negotiating power when it comes to purchasing new software. Following are a few hints for making a smart selection:

**Pricing.** The Internet has made software pricing more transparent. With competitive solutions a Web page away and the rise of subscription pricing for enterprise software, companies are increasingly becoming more open about the price of their solutions. Ask your prospective vendor their prices and if the software can be offered under a subscription. A warning flag should come up if the answer to either question is no.

**Trial.** Many customers got burned during the Internet bubble, purchasing expensive software on a handshake and watching the solution fail to deliver on promises. Demand the ability to see and try the software before you purchase to ensure it meets your use case. If the vendor is reluctant, it most likely means bigger problems

for the actual implementation.

**Open.** The Internet works because it is open and interoperable. This same concept is increasingly being demanded by customers of enterprise software. Is the software a proprietary blackbox or can it be extended to fit specific-use cases and integrated with other technologies? Ask vendors if you can see and modify the source code. A "yes" answer will mean more control over your implementation. A "no" answer means you will most likely be locked into the vendors solution and roadmap. If the answer is the latter, keep looking.

## Telrex (News - Alert)

**Robert Kapela, President**

In searching for the right solutions for your business needs, it is imperative that you find vendors that are willing to partner with you — offering your business the opportunity to evolve. Options like software-as-a service (SaaS) or subscription-based licensing allow you the flexibility to "pay as you grow," or remove licenses with the seasonality of your business.

Business relationships, especially customer references, are important in assessing the health of your technology partners. Are customers reluctant to speak on the vendor's behalf? Did any of the customers experience the same business pains as you? Does your vendor have intimate knowledge of your environment and needs?

Your technology partners should be equipped to support you through flexible technical support options that fit with your critical operating hours. In addition, your telephony vendors should have a strong network of reputable resellers and partners. Products that interoperate with other solutions should be certified, and should have a formal business partnership so that you can leverage their technology and relationships to receive the best solutions available.

Partnering with technology vendors who have a strong reputation, great working relationships and flexible pricing and support options will give you a leg-up on your competition and set you up for success.

## Vertical Communications (News - Alert)

**Peter Bailey, Senior Vice President Business Development and Product Management**

The myth about call center technology is that it is a tool for a large dedicated call center organization. Today's integrated IP communications systems enable SMBs to affordably embrace contact center technologies within their organizations. Any customer service, AR, AP or other

customer-facing professional should have access to the full power of call center capabilities such as skills-based routing, call recording and coach/monitor/join to be more efficient and productive.

When looking at phone system options, look for solutions that offer integrated ad hoc call center seats that can be deployed on a targeted basis very affordably within the organization. Today's integrated IP telephony solutions offer a host of powerful contact center features that can be acquired and deployed inexpensively:

**Built-in technology.** Does the application function as a built-in application within the phone system or is it a separate piece of hardware requiring "integration"? An all-in-one solution can reduce the headaches associated with managing multiple pieces of equipment.

**Robust GUI /queue monitor.** Check for ease of use and integration of the user interface. Does the user interface work and act like the interface for non-contact center agents? Does it display call queues, caller wait times, agents logged in, etc.? Does it allow the supervisor to add agents on an ad hoc basis?

**Integrated call recording.** This is a must-have for every company! Call recording should allow SMBs to record any way desired — all calls, calls to a specific agent, every nth call, etc. Mechanisms for searching and retrieving recordings should be fast and easy.

**Reporting.** Any solution purchased should include integrated reporting for tracking productivity and workforce data.

**Teleworker agent solutions.** Today's IP technology should enable workers to log into queues from home or the road — providing maximum flexibility.

**Skills-based routing.** The ability to set up different queues for organizational experts so calls are directed to the appropriate agent/employee faster should be present. **CIS**

### The following companies assisted in the preparation of this article:

**CosmoCom** ([www.cosmocom.com](http://www.cosmocom.com))

**Five9** ([www.five9.com](http://www.five9.com))

**IEX Corp.** ([www.iex.com](http://www.iex.com))

**Interactive Intelligence** ([www.inin.com](http://www.inin.com))

**SugarCRM** ([www.sugarcrm.com](http://www.sugarcrm.com))

**Telrex** ([www.telrex.com](http://www.telrex.com))

**Vertical Communications** ([www.vertical.com](http://www.vertical.com))



## Oh No! Not Southwest Airlines!

Those of us in the CRM world have long had a few superstars, and we use them the way English teachers use *The Great Gatsby* or *Macbeth* — companies that you could always trot out to support any point you're trying to make on proper customer service, customer-centrism, CRM, Putting The Customer First, The Shocking, Little-Known Business Secret That Customers Don't Like Being Treated Poorly, or whatever terminology you choose.



Amazon.com ([News - Alert](#)) is one of those companies. Enterprise Rent-A-Car shows up in quite a few CRM textbooks, as does department store Nordstrom, which earned itself a place in CRM lore simply for taking back four tires a customer wanted to return and reimbursing him. Nordstrom's doesn't sell tires. But by heaven they took them back.

Gordon Bethune put Continental Airlines in the constellation. L.L. Bean, of course, has long been legendary for customer service. And there was Southwest Airlines. If you Googled "Southwest Airlines" and "bad customer service" you got that page saying maybe if you remove quote marks you'd get more — some, any — results.

Southwest patriarch Herb Kelleher was a CRM writer's godsend. He did everything we suggested companies do — and it worked. If we needed a Potemkin Village to show A Happy CRM Workers' Paradise, we took them to Southwest. Kelleher's understudy Colleen Barrett said things like "Other airlines can't do what we do, it's too simple." Hey look — the flight attendants are wearing hot pants, serving wine coolers and laughing.

A little remembering of the passengers' names here, a dollop of turtle blood soup there, nuthin' fancy here at Southwest, we're jest plain folks tryin' to do the right thing and customers ate. It. Up. All it resulted in was a skein of profitable quarters unbroken back to the Wright Brothers. See? See? We CRM writers crowded. Do what we say, put the Customer At the Center of Your Business and you, too, can Dominate Your Industry!

People would go out of their way to fly Southwest. Family members would be told to move to a city serviced by Southwest if they expected visits. People would take Spring Break in Minneapolis instead of Ft. Lauderdale because "Southwest flies to Minneapolis." Somewhere out there, I know it, is a child named "Southwest."

Then this reporter dropped out of the CRM biz for a while, moved to the Mediterranean coast of Turkey and ran a coffee shop. Where

we practiced good CRM, of course.

A couple years ago, I took a job writing about CRM again — it's like riding a bicycle or prison tattoos, you never forget — and assumed All Was Well with my pantheon of CRM saints. Hey Amazon.com was still as good as ever, why would anything else change?

Then I heard the rumbles. Faulty inspection reports. Unconfirmed sightings of a disgruntled passenger. Southwest spoken of in something less than reverent tones. I... okay, I ignored it. I didn't want to know. I avoided. I clinged. Hi, I'm Dave and I'm a willing ignoror of faults in my favorite companies.

But there was no avoiding The Wall Street Journal's March 8, 2008 article entitled, "Southwest's Record Safety Penalty Strains Relations With Regulators" ([www.tmcnet.com/1913.1](#)), whose opening paragraph read "The government's proposed \$10.2 million penalty against Southwest Airlines Co. for maintenance lapses has strained the carrier's relationship with regulators and threatens to hurt its image as a pioneer in efficient, passenger-focused operations."

Evidently, according to the Journal's information, Southwest knowingly flew 46 older-model Boeing ([News - Alert](#)) 737s without performing mandatory structural inspections. The Federal Aviation Administration unleashed the dogs to go in, secure a beachhead, kick butt and take names. The troops stormed United first out of sheer habit before they rerouted, checking and double-checking their directions the way a pizza delivery guy would recheck an order for three large pepperoni and ham pizzas with extra cheese to a synagogue.

Now, this reporter doesn't pretend to be an airline flight safety expert. (I do pretend to be a 23-year old blonde named 'Nautie Pixie :)', but that's another story and has nothing to do with this one.) Be the results of the investigation as they may, what interested me was Southwest's CRM reaction to the imbroglio.

Isn't that a great word, "imbroglio?" Try working it into a conversation this week.

It's not even that I'd ever assumed Southwest was perfect. I'm sure they have their issues, it's CRM axiom that all companies do, and that, in fact, when a customer has a problem with you, that's a Golden Opportunity to bind that customer to you like Krazy Glue.

Southwest officials swore like rappers that it was not, repeat, not a flight safety issue. Fine. Let's take their word for it and see it as a customer service issue, not a flight security issue. As Southwest has been such a holographic example of CRM from Day One, I, and the rest of the fraternity, assumed they would knock it out of the park.

The chalk in this situation, how we draw it up at practice, what Paul Greenberg and Ye Lesser Gods of CRM tells you to do with disgruntled customers is to feel their pain, acknowledge the problem, keep the customer informed of efforts to rectify the problem. Offer the customer something tangible to let him know you care — another hamburger cooked properly, frequent flier miles, something in your wife's size, whatever the situation calls for. This is called Winning Over A Customer.

And this works because it's a well-kept secret that pretty much everybody except the guy who's going to audit your particular tax return wants to like people. Really. Everyone wants to be the beneficent doler-out of goodwill, pat the cowering minion on the head and say "On your feet, my good man, let's not have it again, shall we?" That doler is won over to the dolee's business. You see somebody going out of their way, missing lunch, making a call after hours just to fix your problem — you're morally obligated to shop from that place again. This is a matter of established Conventional Wisdom.

Southwest had a Golden CRM Opportunity to do this: to win over customers en masse. I mean, when you're the airline industry's unchallenged poster boy for customer service, everyone drops what they're doing and looks to see how you handle a genuine brouhaha.

That's another great word. For extra points, use in the same sentence with "imbroglio,"





like “There was a brouhaha in Madame Eve’s imbroglio on the south side last night.”

So how did Southwest handle it? They bombed. Big time. The company launched its own investigation “into its interpretation of the FAA’s guidance,” the Journal reported, insisting it was “at no time” operating in an unsafe manner: “It also released a statement from former federal crash investigator Gregory Feith, concluding that the structural cracks ultimately discovered on some of the planes didn’t pose a safety of flight issue.” They hired Bill Belichick and Dan Rather as their new spokesmen to reiterate that they were really in the right all along.

Look, we all need lawyers. Some of us, and I don’t mean to asperse, but some of us like lawyers. A fine, reputable woman of my acquaintance voluntarily married one. But we do not want somebody to talk like a lawyer when all we really need to hear is “Hey, whoops, my bad, won’t happen again, promise, 10 percent off all fares for a month, and an extra cookie for every flier.”

Southwest came across — and again, I’m not sayin’ I know for sure, ‘cause I don’t — but Southwest came across as more interested in C’ing their own A than apologizing to customers. Okay, basically anybody who gets on a plane in the first place has a greater amount of faith than a garden-variety atheist needs to not only believe in God but send money to Jimmy Swaggart in the bargain, we all know that there’s no such thing as a risk-free flight, and we know that no airline perfectly follows e-v-e-r-y single cotton’-pickin’ line item on e-v-e-r-y single maintenance form (“Two wings? Check.”). We get that. What we don’t get is an airline more concerned over how it looks than how we feel.

Because, friends, CRM is about feeling. That’s right, Morris Albert-style wo wo wo feeee-lings. It’s about how you make the customer feel. And you have only so many opportunities to do that. You have your Everyday Interactions — “Thank you for chosing us, have a nice flight,” “A wine cooler? Thanks” — which Southwest aces, and you have your imbroglios, your brouhahas, your Major Chances To Speak To All Your Customers, not to mention your Golden Opportunities.

Southwest was so good sweating the little stuff, we thought they’d knock the big stuff cold. After all, they were a CRM Champion. They’d had precious few opportunities to win customers over in crisis situations because they were so good, they’d had to practice damage control about as often as Brett Favre has had to pay the bill in a Green Bay restaurant.

But they didn’t. They got technical when they should have been expansive. They nitpicked when they should have grinned sheepishly. They sent out the lawyers when they should have sent out free drinks.

In short, they struck out, and there is no joy in Mudville. **CIS**

*The author may be contacted at david@davidlsims.com.*



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By Craig DiAngelo,  
Director of Business Affairs,  
VoltDelta Hosted Solutions

From The Hosted Speech Experts

## Implementing Hosted Speech Solutions

Almost every inbound contact center could benefit from the use of a speech automation solution. Historically, only large and well funded contact centers could even consider implementing speech automation due to the complexity and the high up-front cost. With the advent of the hosted model, speech solutions are now available to almost any contact center without the major capital expenditure and technical expertise formerly needed. To attain the maximum effects from implementing a hosted speech solution, the contact center must plan and implement the solutions wisely. Following are some basic rules to increase the positive impact of deploying a speech solution.

**Goal setting.** Ask the questions that will define the project: what is the goal for implementing a hosted speech solution? Is it to replace an aging DTMF system? To reduce average agent time? To enable a greater level of self-service to callers? To automate the most routine calls? Clearly stating the goals for the implementation help to guide the process and evaluate the results.

**Application planning.** Analyze the current call flow/user interface, and design a progressive voice user interface that integrates speech technology. Script, mock up and run through the dialogs in an iterative process to improve the user experience of the call flow. Avoid re-creating an existing DTMF prompt; the use of speech will require solicited responses from directed questions.

**Design and implement.** With the call flows mapped out, use a graphical user interface to build the application. Be innovative and ask creative questions to help segment grammars and improve overall efficiency. Also, keep track of the errors for individual prompts as well as the overall call flow to guide the automation potential. The number of re-prompts contributes to the balance of a streamlined automation versus the overall customer experience.

**Go live.** Get ready to implement the solution. Integrate the speech solution with the other assets of the contact center such as CTI with data bases and ACDs for call routing. Testing is also important; from stress testing to goal achievement assessment.

**Measure and tune.** Speech solutions are an ongoing and iterative process. The host-

ing provider will provide expertise in token capture, call recording and reporting, and will provide feedback to be used in tuning flows and grammars. Analyze the results and measure success against the original goals.

The hosted speech solution provider is a key resource in all of these steps. The provider has implemented many speech solutions and brings a wealth of experience and expertise to the project. The hosted solutions provider should and will be the contact center's in-house expert.

*VoltDelta (News - Alert) Hosted Solutions provides contact centers of all types access to leading-edge technologies including speech automation, IVR, ACD, VoIP transport, multimodal messaging and outbound alerts on the per-minute used model. To learn more, visit [www.voltdelta.com/voltdelta-hosted-solutions](http://www.voltdelta.com/voltdelta-hosted-solutions).*

### Speech Within Your Reach

By Tracey E. Schelmetic, Editorial Director, Customer Interaction Solutions

Who doesn't remember the first time he or she interacted with a speech recognition engine? Sure, it felt a bit odd to be speaking to a computer, but it also felt so progressive and futuristic. As an end user of the technology, it was exciting. As a contact center manager or CTO, it was a tad depressing. It was a technology so far out of the reach of your organization for a number of reasons: cost, implementation time, a lack of IT personnel to plan and administer it and the imagined headaches of troubleshooting it. There is a reason why only large financial services organizations and airlines had speech self-service technologies: they were the only ones that could afford it. Even with the volume of calls that these organizations moved, the ROI still took a long time.

Forget even the expense and time of purchasing and implementing earlier iterations of speech. Just determining your organization's needs in terms of call-routing and self-service sounded like a headache waiting for a place to happen. Speech is not touch-tone IVR and can't be treated the same way (and who ever really got the knack of effectively building touch-tone IVR menu trees in the first place?)

Today's hosted speech solutions are bear little resemblance to the massive-scale projects of five to 10 years ago, except in their enviable end goal: to allow customers to use the most natural of interfaces — their human voice — to take care of their own needs and keep your expensive live agents free to handle complex inquiries which is, after all, what you pay them for.

So now that cost and implementation are no longer a barrier keeping you from seeking speech for your call center, you might need to sit down and make a list to convince yourself (or the company's executive level) why you should take the steps toward speech-enabling the organization. This part is even easier than today's hosted solutions implementations. The list of key performance indicators (KPIs) that can be dramatically improved via speech is long.

- Because customers like using speech much better than they liked touch-tone IVR, they are less likely to abandon calls. Add to that the fact that speech self-service and routing are more natural and efficient (and therefore customers actually find what they're looking for), and that call abandon rate drops even further.
- Fewer abandoned calls and better self-service leads, in turn, to more satisfied customers. Companies implementing speech solutions have experienced immediate and noticeable improvements in customer satisfaction.
- More satisfied customers and fewer boring, rote tasks leads to happier agents, less burnout and, therefore, less turnover in the workforce, which is a major cost savings, since recruiting, hiring and training agents is the single largest expense of the contact center.
- Effective speech solutions can lead directly to improved rates of first-call resolution, an achievement that positively touches every KPI and every aspect of the contact center.

What this all means is that the path to effective speech solutions in your contact center is now free of obstacles. It's time to start listening to the voices of your customers — quite literally.





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# Americans Leery Of Shopping Online

Making purchases online has long been perceived as a risky endeavor for many, as they lack the knowledge needed to fully understand if their information is protected on a certain site or not. This lack of knowledge does present the greatest risk as these individuals may fail to take the proper precautions, not only in purchases, but in online use in general.

According to a recent survey of 1,000 U.S. adults conducted by TNS ([News - Alert](#)) Sofres ([www.tnsglobal.com](#)) for Gemalto ([www.gemalto.com](#)), 57 percent of Americans are afraid that someone will steal account passwords when banking only, and 38 percent do not trust online payments, banks and other e-commerce providers. The survey indicates that such providers have a long way to go in building consumer trust in the online channels.

The research, Digital Trust Barometer, focused on the individual's attitude and behavior concerning digital security and technology. It revealed people's concerns about digital security actually go beyond the Internet. Only 22 percent of those surveyed felt "very good" about the security in any of the digital technology they use.

The list of fears of those surveyed is topped by I.D. theft. Seventy-four percent listed this as a primary fear, while 44 percent were afraid of online bank account hijacking. These fears are not without good reason, as fully 21 percent of respondents had already suffered from bank data theft.

The research also found that large numbers of Americans like the idea of a personal portable security device that will protect them online — 37 percent were interested in a USB key, like those containing smart card technology, to secure Internet payments and online accounts.

The survey also found that there is an upside to restoring online trust, as 40 percent of Americans declared they would purchase more

online if security was reinforced, and 49 percent would visit new merchant Web sites.

It was also clear from results that there was a good return on branding when people shop online, as 87 percent of Americans said being at a well-known Web site is reassuring when paying online. Still, another 44 percent of Americans were worried when they purchase with their credit card online.

Questioned as to the most reliable source for information on digital security, 42 percent believed that friends and family were the most reliable source. After relatives, 27 percent considered companies specializing in digital security as an accurate and reliable source of information. At a rate of 7.6 percent, banks were considered a distant third.

While providers may have a long way to go to secure consumer confidence, consumers have to take some responsibility in the process to educate themselves about the threats and the potential in online practice. Always relying on others to do the ground work won't always protect them from risk. **CIS**

# Labor Shortages In Global Market Impact Offshoring Decisions

The viability of the offshore market continues to be under scrutiny as organizations are feeling the economic crunch and turning to alternative solutions in order to drive down costs without sacrificing service.

XMG ([www.xmg-global.com](#)), a global ICT research and advisory think tank, recently conducted a study of popular offshoring countries in Asia, including China, India, Malaysia and the Philippines. The study found that the average growth of the IT labor pool in the Philippines for the last five years rests at 10 percent and is forecasted to grow by another three percent in the next two to three years.

This study also revealed that despite the steady increase of the IT labor pool, it is insufficient to sustain the total ICT demand in the Philippines, which is projected to grow by 30 to 35 percent full-time-equivalent year-on-year through 2010.

Metro Manila will be providing much of the fresh talent, taking up 22 percent of the estimated 50,000 to 60,000 graduates each year.

According to XMG statistician Benedict Dormitorio, "There is a clear need to establish additional training institutions and ladderized degree programs by existing universities to boost the dwindling talent supply due to the growth of the Philippine offshoring industry and the migration of IT skilled workforce to countries

such as the United States, Singapore, Canada, the Middle East and Europe."

Dormitorio also stressed the importance of ensuring curriculum alignment of educational institutions with the current market needs of the industry through close consultation with ICT companies and organizations.

The study provided an overview of the availability of IT manpower primarily based on skill sets. XMG has segmented the labor supply by education attainment with at least a four-year bachelor's degree and other IT vocational courses and skill set.

According to the study, "For programming and business solutions, IT skills on SAS ([News - Alert](#)), SAP, Lotus Notes and MySQL will be increasingly difficult to source and companies must be prepared to pay a premium price to recruit these individuals."

The study further emphasized networking skills will be at risk, such as those in network administration. "Across all segments, there is a significant decreasing trend on the available

labor force meeting the required IT skills set needed by the market," Dormitorio continued.

"With the increasing demand for IT professionals today, companies should be aware of the situation and align their strategies to mitigate risk coming from the labor market," added Chief Analyst Lauro Vives.

"It is imperative to first understand the saturation level of the labor market by forecasting both demand and talent supply before making any firm commitment on expansion plans or further investments."

The XMG study mentioned that, "In order to minimize paralysis on critical operations and sustain growth, companies must extend their recruitment reach, improve their skill development pathways, enrich retention and provide hot skills training on the existing talents in the organization to avoid high additional cost components associated with these skill areas."

For those organizations seeking to outsource and offshore their help desk operations, the conditions of the global contact center industry in terms of IT capabilities and labor availability are a significant consideration. If shortages continue, it may create better cost controls to keep IT professionals onshore in the long run. **CIS**

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## Yahoo's Voice Search Ambitions

In his VoIP blog, Rich Tehrani ([News - Alert](#)) writes:

*Yahoo has just invested \$20 million in vlingo, a voice recognition company specializing in the mobile market. Yahoo!, leveraging this relationship, announced the launch of a voice-enabled version of Yahoo! oneSearch, a new mobile search client that supports unstructured, open-ended voice searches that allow the consumer to speak their query as they would type it into the search box.*

*One can imagine many applications of voice search such as the integration of GPS/mapping or SMS communications while driving.*

*Of course this information is not lost on Microsoft as they picked up the leader in this space, TellMe, a while back. To be fair, TellMe uses speech recognition in the cloud meaning it is not hosted on devices.*

*Microsoft already has a speech recognition application for Windows Mobile devices but to date it has not integrated this technology into search.*

Visit Rich's blog at <http://blog.tmcnet.com/blog/rich-tehrani/>

## Microsoft Dynamics CRM Online

In her "Call Center/CRM" blog, Tracey Schelmetic writes:

*Microsoft recently announced, somewhat informally, that it is changing the name of its software-as-a-service CRM solution from Dynamics CRM Live to Microsoft Dynamics CRM Online. The move, which is affecting the name only, is an attempt to avoid confusion between the SaaS CRM solution and Microsoft's other "Live" named solutions.*

*"Whereas the Live brand is focused on consumers and small businesses, the Online brand is fully aligned with our existing Dynamics CRM strategy of delivering outstanding solutions for small businesses, midsized companies and large enterprises," wrote Brad Wilson, general manager of Microsoft Dynamics CRM.*

Visit Tracey's blog at <http://blog.tmcnet.com/call-center-crm/>

## OCS-enabled Contact Center

In his Hyperconnected Enterprise blog, Tony Rybczynski ([News - Alert](#)), Director of Strategic Enterprise Technologies for Nortel, writes:

*Microsoft and Nortel jointly announced their commitment to deliver transformed solutions in the contact center space under the Innovative Communications Alliance ([News - Alert](#)).*

*This solution from Nortel-Microsoft will not only UC-enable the contact center with Office Communicator, but will speed up customer service. Microsoft estimates that 10 percent of contact center calls (1 billion per year worldwide) can be expedited by reaching out to subject matter experts across the enterprise. Nortel calls this feature 'Expert Anywhere' which has been available using the Nortel Contact Center and MCS 5100 UC solution for some time.*

*Customers will be able to see proof-of-concept demonstrations of the Nortel Contact Center Suite (which Info-Tech solidly positions as #2 in the market in revenues, agents and systems) as a software application integrated with OCS 2007, by visiting our joint Collaboration Centers later this summer.*

Visit Tony's blog at <http://blog.tmcnet.com/the-hyperconnected-enterprise/>

## ESolutions And Salesforce.com

In his "First Coffee" blog, TMCnet's David Sims writes:

*ESolutions Force has announced a partnership with Salesforce.com covering the Middle East region at their recent CRM Essentials Workshop.*

*ESolutions officials say the company can now sell "end-to-end products to the Middle East." The tie-up makes eSolutions Force, part of MDS Group, the strategic partner of Salesforce.com in the region, providing Middle East regional sales and marketing as well as providing implementation, training, coaching and support to Salesforce.com's on-demand CRM applications.*

*The move comes as CRM becomes increasingly accepted and implemented in the Middle East. A recent IDC study noted that the CRM on demand market in the Middle East and North Africa region was worth an estimated \$52 million and was experiencing a 47 percent growth rate year-on-year. One of the reasons for the growth of CRM is increased investments by the banking, government, and retail sectors in the MENA region.*

Visit David's blog at <http://blog.tmcnet.com/telecom-crm/>



## Xangati Helps Front Line Agents

In his VoIP Authority blog, Internet Telephony's Greg Galitzine ([News - Alert](#)) writes:

*Xangati has announced Virtual Task Manager solution, a rapid problem identification application that can be deployed right to the front line support groups in either enterprise or service provider settings.*

*Previously, the ability to drill down to help solve a customer complaint was reserved for senior level agents and managers. The new solution enables the first tier of customer support — those who actually field the complaint calls — to have visibility into a customer's network and what the subscribers are doing at any given time.*

*This enables them to rapidly get to the heart of the customer complaint, which has several benefits, including a reduction in the total number of customer service calls, less time spent on the phone with each caller, fewer truck rolls to resolve issues and reduced customer churn as a result of happier, more satisfied customers.*

Visit Greg's blog at <http://blog.tmcnet.com/blog/greg-galitzine/>





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May 15, 2008 • 12:00pm ET/ 9:00am PT

## **The Five Reasons Enterprises Should Move From an IVR to a Voice Portal**

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<http://www.tmcnet.com/webinar/intervoice-frost>

May 20, 2008 • 1:00pm ET/ 10:00am PT

## **IPv6 in the World of VoIP: Crucial Upgrade or Major Technical Challenge?**

Sponsored by:



<http://www.tmcnet.com/webinar/mera-systems>

May 21, 2008 • 2:00pm ET/ 11:00am PT

## **Key Considerations for Planning & Deploying Unified Communications Successfully**

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<http://www.tmcnet.com/webinar/dimension-data>

May 22, 2008 • 2:00pm ET/ 11:00am PT

## **The Complete Managed Hosted VoIP Solution from AT&T How Can You Benefit?**

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<http://www.tmcnet.com/webinar/att-netcomp>

June 24, 2008 • 11:00am ET/ 8:00am PT

## **Using KPI's to Optimize the Network**

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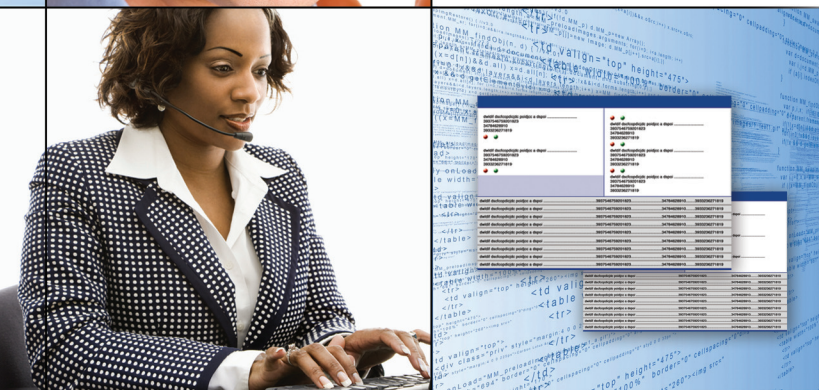
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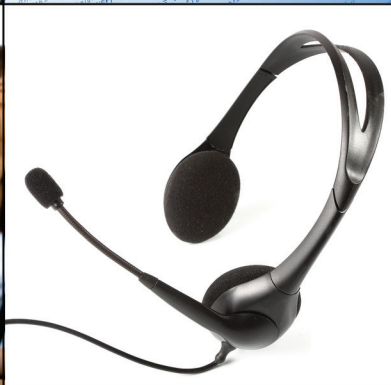
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## Customer Interaction Solutions' Ninth Annual CRM Excellence Awards, Part One



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

Congratulations to the winners!

*EDITOR'S NOTE: Because of the very large volume of award applications we received, the CRM Excellence Award winners will be presented in two parts; Part Two will appear in the June 2008 issue of Customer Interaction Solutions. More information about winning companies and their products and services may be found at [www.tmcnet.com](http://www.tmcnet.com).*

### **Allegiance**

The Allegiance Engage Platform  
[www.allegiance.com](http://www.allegiance.com)

### **Alloy Software, Inc.**

Alloy Navigator  
[www.alloy-software.com](http://www.alloy-software.com)

### **Angoss Software Corporation**

Angoss FundGUARD  
[www.predictiveleads.com/fundguard/](http://www.predictiveleads.com/fundguard/)

### **Aplicor, Inc.**

Aplicor Enterprise  
[www.aplicor.com](http://www.aplicor.com)

### **Aspect Software**

Aspect Unified IP and Aspect Performance Edge  
[www.aspect.com](http://www.aspect.com)

### **Astute Solutions**

ePowerCenter  
[www.astutesolutions.com](http://www.astutesolutions.com)

### **Autonomy etalk**

Intelligent Contact Center  
[www.etalik.com](http://www.etalik.com)

### **BT**

BT Contact Center Services  
[www.btplc.com](http://www.btplc.com)

### **Citrix Online**

GoToMeeting  
[www.citrixonline.com](http://www.citrixonline.com)

### **Clear C2, Inc.**

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[www.c2crm.com](http://www.c2crm.com)

### **Consona CRM**

Onyx  
[www.consona.com](http://www.consona.com)

### **Cross Country Automotive Services**

Argosi Web Portal  
[www.crosscountry-auto.com](http://www.crosscountry-auto.com)

### **CustomerSat**

CustomerSat Enterprise  
[www.customersat.com](http://www.customersat.com)

### **Empirix Inc.**

Hammer Performance Assurance for Siebel  
[www.empirix.com](http://www.empirix.com)

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### **Entellium**

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

### **Envox Worldwide**

Envox CT Connect  
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### **Epicor Software Corporation**

Epicor IT Service Management  
[www.epicor.com](http://www.epicor.com)

### **eTelecare Global Solutions**

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### **Inova Solutions**

Inova Solutions OnTrack & LightLink  
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### **KANA Software**

KANA IQ  
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### **LiveOps**

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

### **Mall Networks**

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

### **Maximizer Software, Inc.**

Maximizer CRM 10  
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## Customer Service Debacles “R” Us

There are some customer service fiascos that make you want to bang your head against the wall. When they come to you courtesy of a mom-and-pop Internet business, all you can do is sigh, heave your shoulders and say “Well, that’s my fault for going with amateurs.” When the debacle is brought to you courtesy of a national chain, it really makes you wonder how the business has managed to keep its doors open and who is running the company’s customer service. Witness the following scenario.

**Tuesday, April 1st:** Upon realizing that my increasingly mobile young child required a play yard for the purpose of her safety, our sanity and the continued mental health of our family cats, I began investigating options. I found one we liked...the largest available, the Graco Pack ‘n Play in Bugs Quilt Totblock. I checked both Walmart.com and Toysrus.com for the item. Neither had the play yard in stock at my local stores, so I was obliged to order it online. I chose Toysrus.com and received an e-mail confirming my order and informing me the item was in stock.

**Tuesday, April 8th:** It was at this point, a reasonable week after placing the order, that I began anticipating the arrival of my play yard. To no avail.

**Thursday, April 10th:** Realizing that my credit card number hadn’t been charged yet, an indication that the company had not even begun processing the order, I called the Toys “R” Us customer service number, which has some fine and expensive speech recognition software at the front end (please keep this fact in mind for purposes I will outline later). The agent informed me that for standard ground delivery, it could take up to 10 business days for the item to arrive, so we were still technically within our window. I asked her if the item had shipped yet (since that 7- to 10-day window is supposed to be the total time it takes for me to actually get the item, according to the Toys “R” Us Web site. She admitted it had not, but she was sure it would be shipping shortly.

**Tuesday, April 15th:** Upon realizing that my credit card still had not been charged, my child still had no play yard to contain her extreme exuberance and speedy enthusiasm for putting herself into precarious situations, my spouse and I were exhausted from trailing her path of danger and destruction through the house, and my cats were packing their small bags to leave the premises for good, I called the “helpful” Toys “R” Us customer service line again. I routed myself obediently through their IVR system using their oh-so-fine speech recognition solution. Part of this process included speaking my 10-digit order number, which the system accepted. Informed by the automated system that my order was “processing” (presumably in the same manner and at the same rate that erosion in the Grand Canyon is “processing”), I spoke the words “representative” to get a human on the line. (I had learned, during my last encounter, that speaking the word “agent” got a caller put into a hellacious and circuitous IVR loop of despair.)

I explained to the representative (don’t call her an agent!) that I wanted to know if the company planned to fill my order and when would it be convenient for them to do so? She asked me what my order number was. I said, “You mean, the 10-digit order number I just spoke to your oh-so-fine speech recognition solution? That number?” She agreed that was the number. “You don’t have it?” I asked incredulously. “It didn’t screen pop to you with my call?”

“No,” she said, patiently waiting for me to speak my number. Again.

There you go. That’s technological wisdom. Buy a speech recognition solution just for front-end decoration. It’s like buying a Faberge egg because you need a paperweight for your desk.

I gave her my customer number. She looked up my order and agreed that it hadn’t shipped. She wasn’t sure why, though. “I could put in a request to the warehouse. But you’ll have to call back to find out why it hasn’t shipped.”

“Wait,” I said, not really believing what I was hearing. “I have to call YOU back to find out why you don’t appear to want to sell me something? Can’t someone call me back?”

“No,” she said. “What will happen is that an e-mail response will be send into your account. It may take up to 24 hours,” she added.

“Of course it will,” I said. “Do you mean that I will receive an e-mail informing me of the situation?”

“No,” she said. “It will be sent internally to your account. That’s why you have to call back to find out what the issue is. We’ll have to do the same thing if you want to cancel your order.”

Apparently, the phones at the Toys “R” Us call center operate on an inbound basis only. Some extra technological frugality to save money, perhaps?

“I don’t want to cancel my order,” I said. “I just want my order.”

The representative offered some helpful wisdom that perhaps it had something to do with the airlines cancelling flights. Because, apparently, Toys “R” Us ships its merchandise coach on passenger jets. I wonder if the merchandise is offered a small packet of peanuts and a free soft drink in a plastic cup?

So here we are. Three weeks later: no play yard. No contact from the company. No explanation. No ability to either discover what the problem is or cancel without contacting the mysterious “warehouse.” (Warehouses, of course, cannot be linked to the call center’s CRM system because...well, we’re not sure why. Just because.)

But in the meantime, I must dash. My child is delighted that the crunchy kernels she just dug out of the cat’s food bowl while I had my eyes averted for nine seconds are the shape and texture of Cheerios, which she adores.

Gee...I wish I had a play yard.

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



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## Recovering From An Embarrassing Interaction

**Q** Sorry for the lengthy question, but I recently had an interaction with a female customer (I'm male) that was rather embarrassing and I wasn't sure how to handle it. Here's what happened.

I work for an ISP help desk, and a woman called about a problem with her Internet connection. She was already upset, and I guess all the security questions we have to ask pushed her over the edge. After her account number, social security number and a couple other questions, she blurted out "Do you need my bra size, too?" Unfortunately, her sarcasm didn't instantly register, and without thinking, I replied "We already have that." The silence that followed seemed to last forever, but I eventually got back to my service script and got her connected. Even though she thanked me for my help, I wasn't sure whether to apologize for my brain fade or just keep my mouth shut, so I didn't say anything because I didn't want to make matters worse. What would you have done?

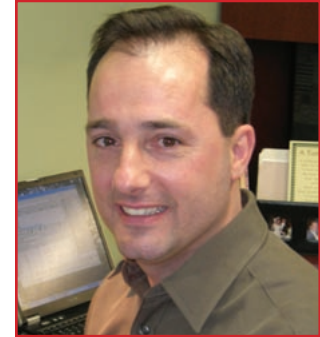
**A** [Chuckle] I'm usually quick to answer the questions for this column, but yours isn't a typical question. In fact, it's probably the most outrageous question I've ever received. Anyway, here goes: Having been a contact center agent myself, I've had some similar faux pas — as have most agents — and all I can say is they're often bad news/good news situations. In your case, bad news because you certainly didn't qualify for the "Best Customer Service" award, but good news since it's not like you broke any commandments of the Customer Service Handbook. I would like to know one thing, however. Was that period of silence because you were trying to pry your foot out of your mouth?

For many agents, it's easy to switch to auto pilot at times, especially when they're asked the same questions day after day and track one account number after another. "Brain fade," as you say. Still, are embarrassing slip-ups acceptable when someone's brain momentarily disengages? It depends on how the situation gets handled.

With your customer, all I can say is thank goodness you didn't initially process what she said. At least you didn't crack up laughing or respond with something like, "Your bra size would be great if you have it handy..." Given my own experience, you did the right thing by stopping to reengage your brain and realize your response wasn't exactly appropriate.

As for the silence, not immediately saying anything more after your gaffe also worked in your favor. Mostly it allowed you to catch your breath and regain your composure. At the same time, though, it allowed your customer to gather herself — to realize that, while her bra size made for a good (and potentially effective!) security question, she probably could have come up with a better example.

Once you resumed the interaction is where you came up short. Staying professional enough to get her Internet connection fixed was beneficial, but it would have been wiser had your customer also heard: "Ms. Smith, I'm very sorry for my remark. I obviously wasn't listening and didn't realize what was said. I'm equally sorry you find our security measures to be a burden, but they're in place to protect your account and keep anyone else from accessing it."



**By Tim Passios,**  
*Director of Product Management,*  
*Interactive Intelligence*

No script, just a heartfelt apology that would have eased the uneasiness I'm sure you both felt. Supervisors should stay objective in such cases, too. Had Ms. Smith requested a supervisor and called for an apology, I'd say one was warranted, even considering her own thoughtless comment. But any further discipline like writing you up? I'd say no.

The way I view the industry in which we work, people experience a momentary lapse now and then that can make any interaction a little outrageous. After all, we're human.

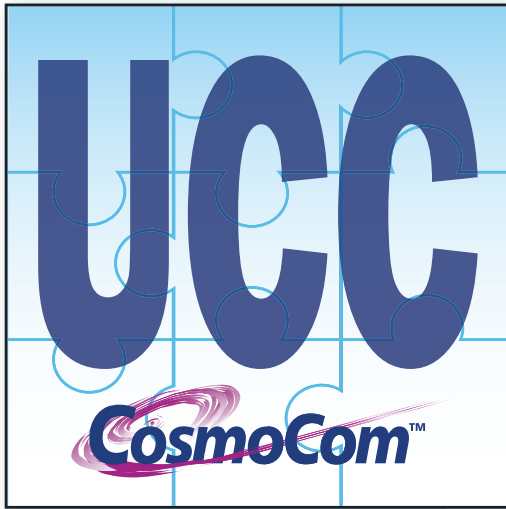
### The "Outrageous Interactions" Promotion

Ok, it's a shameless plug, I admit. But stories like this are why we launched the "Outrageous Interactions" promotion. For contact center agents and managers, the contest is an outlet to tell your most outrageous stories, and to win a five-day/four-night trip to Hawaii if your story is selected as the most unusual. Or win \$500 if our panel of judges selects your "referral" story of another agent or manager as being the best one. Submit your entries before August 31, 2008; we'll announce the winner on September 30, 2008. For more details and to enter online, visit the "Outrageous Interactions" Web site at [www.outrageousinteractions.com](http://www.outrageousinteractions.com). Good luck!

*Tim Passios (News - Alert) is Director of Solutions Marketing for Interactive Intelligence Inc. and has more than 17 years experience in the contact center industry. Interactive Intelligence is a leading provider of IP business communications software and services for the contact center and the enterprise, with more than 3,000 installations in nearly 70 countries. For more information, contact Interactive Intelligence at [info@inin.com](mailto:info@inin.com) or (317) 872-3000.*



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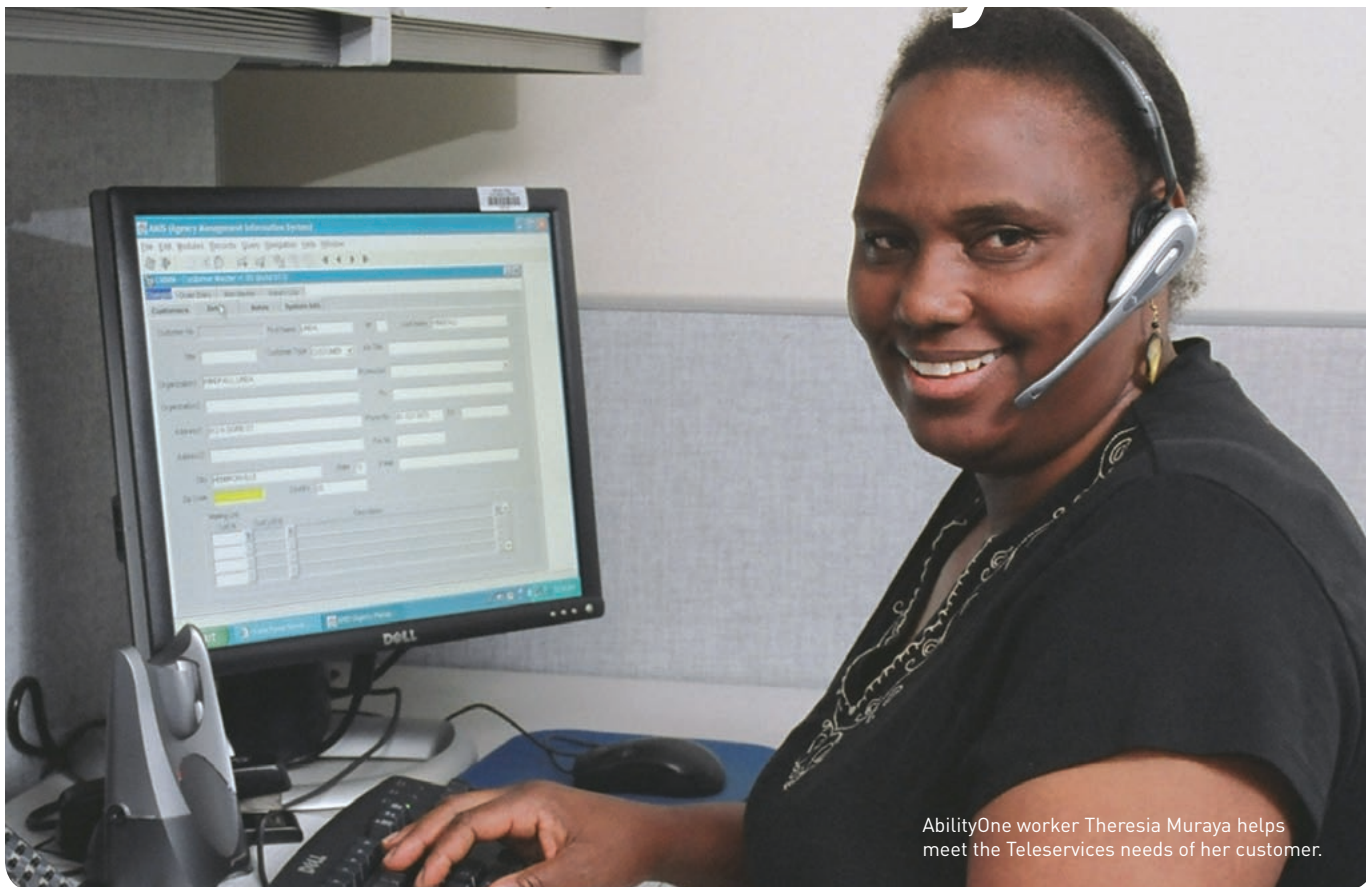
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