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## Why Your Contact Centers Need Real-Time Data

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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.*

# Call Centers Are Just What the Doctor Ordered for Today's Economy

**I**n 1982, we launched this publication as Telemarketing® magazine as the first pioneering act to introduce, develop and promote what is now the multi-billion dollar contact center/CRM industry. Back then we called it "the magazine of electronic marketing and communications." Needless to say that I was ridiculed at first by even mentioning that marketing someday would be done — or should be done — electronically. Today, of course, we know better and we are extremely humbled that our vision was 100% true 27 years ago.

Along the way, we encountered many problems in the early days of developing this wonderful, job creating and job protecting industry. Among them, the fact that the industry really did not exist at that time and we had great difficulty developing articles about a non-existent industry. As I have mentioned before, our editor of Telemarketing® magazine came to me after the second issue and she asked, "are you sure this is an industry?" And I said, "Why?" and she said "I cannot find anything to write about." That's how difficult it was to get the contact center/CRM industry started. But, we had the vision and conviction and I was fully convinced that we were doing the right thing and that this industry someday would become the vital marketing tool globally. And today, of course, we are at that point.

One of the things that separates the call center/contact center industry from other industries is that call centers are basically labor intensive businesses. In spite of many technological developments in the industry, the contact center industry has remained labor intensive because all of the technologies are about increasing agent productivity. And with all due respect to the automation for the inbound side of the business, the outbound side is still labor intensive. In spite of the development of technologies like IVR, the fact remains that even today, when it comes to purchasing a significant product or getting full information about hardware or software that one might use, the preferred choice is to have a person-to-person interactive communication, which was one of the early definitions of telemarketing industry. Having said that, even at the present time, the preferred choice, with all due respect to e-mail and IVR, etc., is people-to-people connection.

In spite of the recent economic slowdown, I am happy to share with you that well-managed contact centers are still growing at 20–25% per year. Having said that, it is incredible to even understand that a 27 year old industry continues to grow at such a vigorous pace. And, of course, the 20–25% increase in growth means an equal number of employees added to the call center. And, therefore, one can call a well-managed contact center as a practically automatic job producing and job protecting industry.

## Business Needs in a Slowing Economy

Common sense and practical experience tell us that in a normal economy, each company may lose 25–30% of customers annually due to consolidation, companies going out of business, and the like. In a recessionary economy, experience teaches us that a company can lose as much as 50–60% of its customers. Having said that, it becomes vitally important for any company to replace the lost business with new business.



In other words, new business is vital to the survival of any company at any time particularly in a slowing economy.

### Why Lead Generation is Vital

As I have stated in many of these editorials, all sales begin with sales leads. Accordingly, all new businesses begin with new sales leads. If one can understand that, it becomes abundantly clear that quality sales leads are the most vital part for survival of any company.

### The Digital Evolution Has Changed the Paradigm of Producing Quality Sales Leads

In the old direct mail system of marketing, factors such as demography, psychography and segmentation were the main ingredients of a productive marketing program. However, in today's digital age, this paradigm has changed. In other words, one must develop a new strategy of generating sales leads digitally and figuring out how to develop the demographic, psychographic and segmentation factors. It goes without saying that the traditional direct mail techniques for effective lead generation simply do not apply to today's digital marketing because the nature of the business is 180 degrees different from the traditional direct marketing.

### Digital Lead Generation

In traditional direct mail marketing lead generation, one had to select appropriate lists to be rented and then after several testing and spending tons of money, one would come up with a potential mailing

never been in favor of that kind of marketing simply because here at TMC, we hardly even got 1% response from the best lists ever used to generate subscribers for our many publications. I never liked that kind of system because 99% of every marketing piece ended up in the waste basket, which means money down the drain. As a sports fan, I always like to compare business performance with sports performance. Think of it this way, if you have a football coach that lost 99% of his games, how long do you think he would keep his job?

I think the answer is obvious, and that is why I didn't like direct mail.

Fortunately, along came telemarketing and eventually, online marketing, I am happy to share with you that TMC has played a vital role in developing both methods. We all know that the development of the telemarketing/contact center industry has been legendary in terms of growth and we always were at the forefront of that industry.

Once again, we are at the forefront of online marketing, namely, that TMC's Web site [www.tmcnet.com](http://www.tmcnet.com) actually is receiving as many as 3 million unique visitors and 35 million page views per month. As such, TMCnet.com is in a class by itself. No other technology-focused B-to-B Web site even comes close. And, as the leaders and pioneers of contact center/online marketing in B-to-B/technology areas, I continue to believe that the new process of effectively generating sales leads must be done digitally.

A properly strategized digital lead generation strategy combined with the contributions of a teleservices company is the only effective way to generate qualified sales leads, period, end of story.

### Lead Generations Golden Triangle

As Figure 1 indicates, it takes three elements to develop a quality lead generation strategy. The three elements, depicted in the triangle include:

- Digital lead generation;
- An effective call center;
- Teleservices agencies know how



It's fair to say that by leveraging teleservices know-how, and applying it to digital lead generation, companies can achieve high levels of success. Furthermore, if you think about it, there is no shortcut to the above golden triangle formula.

### Contact Centers Play a Vital Role in the Slowing Economy

The old sales philosophy stated that, "nothing happens until somebody sells something." That is where call centers become a uniquely vital ingredient of any sales organization. Even if one produces digital lead generation, you still need a teleservices company's know-how and a call center to qualify the leads. That is how businesses grow — by having new qualified sales leads to generate new business to replace the lost business.

Having said all of that, I think that we have demonstrated that sales leads are created in the most effective way when contact centers and teleservices companies and digital lead generations are combined. However, the fact still remains that while one needs to depend heavily on digital marketing and sales lead generation, by the same token, we still need to heavily depend on the use of contact centers and teleservices companies in order to make everything happen the right way. In that manner, call centers will continue to grow at an unprecedented rate of 20–25% per year which means they are creating 20–25% more jobs on a regular basis. I hope by now we have clearly demonstrated that call centers are not only a main ingredient of lead generation and qualification, but also they are vitally important in job creation and job protection. Furthermore, call centers are just as valuable in keeping customers through CRM and customer satisfaction, customer care and associated technologies.

In plain English, call centers are just what the doctor ordered for today's economy.

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



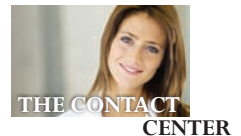
# environmentally FRIENDLY OR Overpay-the-power-company friendly

**Riddle:** When is an IP PBX communications solution for the contact center “**GREEN**?”

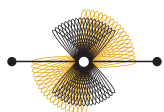
**Answer:** When it's an application suite running on one energy-saving server - which replaces about 10 pieces of energy-zapping equipment, which soak up even more energy for a cooling system to keep your server room from becoming a sauna.

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By Joshua Shale,  
Director of Marketing,  
VoltDelta

From The Hosted Speech Experts

## Hosted Solutions: “Shrink-wrap” Products vs. Customized Solutions

**H**osted Solutions for contact centers have been well established in the market — they are here to stay. The reasons for this are compelling: changing the cost structure from a capital expense to an operation expense; having the hosted provider manage the hardware, software, licensing and maintenance; leveraging the experience and expertise of the hosted provider as opposed to hiring personnel — and more.

When implementing hosted solutions, there typically appears to be two levels of hosted offerings: pre-prepared “shrink wrap” applications and completely customized “built from scratch” solutions. Each of these has their own distinct pros and cons that the contact center needs to evaluate before making a decision on a hosted solution service provider.

### “Shrink-wrap” Applications

These pre-prepared applications are somewhat generic but are typically easily implemented; examples include store locators, survey applications and CTI ([News - Alert](#)) integrations to common CRM packages. These applications are rapidly deployed and easily integrated with the basic contact center infrastructure. They can cover most of the common needs — but rarely satisfy all requirements and are not easily (or in some cases not at all) customizable. Smaller centers are more likely to use these applications as they are better suited to their needs.

### Customized Solutions

Solutions that are built from the ground up and tailored to the exact needs of the contact center are

perfect fits and address all current and most future requirements. They typically involve a discovery and requirements definition phase, a development and a testing phase, and then a roll-out. Solution development will include selecting multiple technologies and integrating them into the provider’s platform. While these solutions are perfect fits the implementation time is long and the process is expensive; typically only larger and more sophisticated centers can have completely customized solutions developed and deployed for them.

### Bringing Together the Best of Both Worlds

Fortunately contact centers don’t have to choose just between “shrink wrap” applications and completely customized solutions; there is a way to get the best of both of these and to get it without their negative aspects.

The answer is hosted solutions that use a proven telephony platform that already has a complete suite of applications integrated into it. The key is that these applications must be easily customizable by the hosted solution provider to exactly fit the current needs of the contact center and to accept future modifications to handle future requirements. This allows for the exact requirement fulfillment of the completely customized solution

but with the implementation time and expense of the “shrink wrap” application. This type of hosted solution provider has the experience to not only perform the rapid deployment but also to bring the expertise in customization to address all the center’s requirements. The cost, while typically greater than that of the “shrink wrap” application, is much less than that of the customized solution and provide an excellent value considering the costs versus requirement satisfaction.

This hybrid approach bringing together the best elements of both “shrink wrap” applications and completely customized solutions enables contact centers of any size and complexity to gain access to solutions that are rapidly deployed, meet their requirements and to provide all of the benefits of the hosted, on-demand model.

### About VoltDelta Hosted Solutions

*VoltDelta Hosted Solutions has announced our new product suites: OASIS On-Call, the complete hosted telephony platform; OASIS Voice Self-Service, the suite of speech automated solutions, and OASIS Web Client, the solution set for agent virtualization, productivity and management. Our new General Manager is Terry Saeger: [TSaeger@Voltdelta.com](mailto:TSaeger@Voltdelta.com)*

### Volt Delta Launches OASIS Smart-Station

Volt Delta recently announced OASIS Smart-Station as an addition to the company’s OASIS contact center suite of products. The new solution provides contact center agents with full telephony and media management capabilities, as well as a clear way of presenting all required applications and services including the use of individual tabbed views for each individual agent application. According to VoltDelta ([News - Alert](#)), as each call arrives these tabs are automatically popped and configured ready for use by the agent.

Additionally the company released OASIS Smart-Station for Microsoft Dynamics CRM, which offers a very rich and flexible CTI interface between the OASIS contact center package and the Dynamics CRM system. The benefits of integrating so closely include the ability to create an immediate screen pop of the customer’s details on call arrival, based on either the caller’s

telephone number or use of other information that the customer may have provided to an OASIS self-service speech application.

The Microsoft ([News - Alert](#)) Dynamics CRM implementation also exploits the tabbed views approach to provide a number of additional screen pops for account-related information and other services. These could include the automatic screen pop of a separate browser window for a customer’s Web site, an immediate customer location with a map and Virtual Earth display based on the customer’s address and even automatically performing an Internet search to provide further details.

Designed to be a flexible highly integrated environment for efficient call handling and customer contact, the new offering from Volt Delta is available both as an on-premise offering and also as a hosted service.

— Greg Galitzine is editorial director at TMC.





## Complementing... Your Premise-Based Systems

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By Brendan Read, Senior Contributing Editor,  
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## A black Plantronics Vista 922 headset is shown at an angle. It features a large, flexible boom microphone with a silver-colored grille and a green indicator light. The Plantronics logo and 'VISTA 922' are visible on the side of the headband. The background consists of abstract blue and green diagonal stripes.

Enhance call quality and reduce unwanted noise with the Vista M22, featuring our advanced Clearline™ audio technology. Your agents will enjoy the superior work experience. Your company will benefit from increased productivity, improved data accuracy, and more satisfied customers.

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



## Noble's Web-Based Agent Tools

**N**oble Systems Corporation recently introduced the Noble Composer Web Agent, an agent workflow design and desktop unification tool for Web-based agent environments. The company believes the solution can help companies improve agent productivity, reduce training costs, increase customer service quality, and leverage technology investments.

In 2006 Noble Systems released the original Noble Composer product which allowed users to create customized scripts, using WYSI-WYG (what you see is what you get) tools to build scripts and agent desktops with on-screen layout, drag-and-drop, and point-and-click features; add fields, labels, text, pictures, and buttons; or link to tables, launch external programs, generate screen pops, and more. The Composer also featured enhanced program launch capabilities, to support direct access to third-party applications from the agent desktop.

Well, Noble Composer Web Agent leverages the desktop design tools that were introduced in the Noble Composer product and expands them to add more functionality for use in browser-based applications. This latest offering from Noble is designed using the Microsoft ([News - Alert](#)) Windows .NET framework and offers support for multiple browsers and multiple operating systems.

I had the opportunity to pose several questions to Chris Hodges, the Senior Vice President of Sales and Marketing for Noble Systems. His responses appear below.

**RT:** What will Web-based agent desktops do for contact centers?

**CH:** Noble's Web-based agent desktops allow contact centers to deploy new seats rapidly without having to invest in expensive desktop hardware or Windows licensing. Noble's web-based agent desktops also enable the "contact center without walls," so that agents can be located anywhere, on any platform (which supports web), for any type of transaction.

What specifically does programming using Microsoft's .NET ([News - Alert](#)) allow Noble Systems to do?

The Microsoft .NET framework allows Noble Systems to utilize the newest code base available from Microsoft, and to use more efficient technologies such as Serialized XML and ASPX. This also provides a method for our clients to develop specialized functionality of their own and incorporate (such as customer DLLs) it into the Composer Agent Desktop without requiring additional professional services.

**RT:** How does using Microsoft's .NET framework help your customers?

**CH:** The Microsoft .NET framework increases performance at the desktop level and gives our users a method for developing their own interfaces for Composer Agent Desktop.

Please describe how your desktop unification tool helps customers in the real world

Noble Composer Web Agent allows our customers to integrate many of

their legacy applications into the unified Composer Agent Desktop, creating a single portal for which their agents can work and access multiple toolsets, including stand-alone executables, mainframe applications, and Web-based applications. The unified desktop simplifies training of new agents, streamlines agent workflow, and increases productivity. For example, in an inbound customer service application, agents can have access to multiple legacy mainframe systems, as well as to CRM and other marketing data for a total view of a customer. With a single click or key function, the agent can pull data from multiple sources and perform multiple updates or actions across applications.

**RT:** Do you see Unified Communications ([News - Alert](#)) playing a role in contact centers?

**CH:** Yes. Agents are already handling many different types of transactions, and we expect this to continue growing as new modes of communication are introduced, including voice, video, chat/IM, SMS, e-mail, fax and standard mail. Unified communications also includes mainframe systems and all of the disparate applications an agent might access. With multiple channels and multiple systems consolidated into the agent desktop, universal agents can simultaneously handle a range of contacts and processes.

**RT:** Where do you expect Noble Systems to be in five years?

**CH:** Noble Systems has been an industry leader for two decades, providing multi-channel customer contact management in call center environments for leading organizations around the world. In 5 years, we will continue to offer unified solutions to provide the best productivity, flexibility, scalability and value for contact centers around the globe. We have always been contact center experts — this is the heart and soul of our company and of our products. As an application-oriented provider of technology, we offer unique solutions to enable our users to lead their respective industries.

**RT:** Give me one surprising contact center prediction.

**CH:** The world economic crises will force more companies to outsource contact center functions.

The currency exchange rate will hold many of these opportunities onshore in the U.S.

It is more crucial than ever for contact centers to become more efficient. Not only will contact centers need to provide unified communication channels, their agents will need to be more universal in their skill sets, as well, to handle cross-functional assignments.

There will be an increase in demand for Workforce Management (WFM) to help contact centers achieve optimum efficiencies.

— Rich Tehrani is Group Publisher, Technology Marketing Corporation





# Adaptive

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

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

By Tim Searcy



## H.R. 1776 on Location Disclosure and Contact Center Certification

I was recently asked to testify in Washington D.C. to discuss House Resolution 1776. Because it is difficult to understand the nature of the legislative process unless you are in the heart of it, let me give a primer. A Representative or Senator in need of political capital in their own district or state crafts legislation to solve a perceived or real problem. The legislation is assigned to a committee and often then a subcommittee to consider and change prior to moving up in the food chain to where it is ultimately voted upon. This legislation was created to address the issue of jobs going overseas by forcing all contacts with consumers by phone to begin with a full disclosure of geographic location. Additionally, the bill requires contact centers register with the FTC and certify that they are in compliance with the disclosure requirement.

Below are excerpts from my testimony on September 11. To see the full testimony, please go to our website at [www.ataconnect.org](http://www.ataconnect.org) for a video link to the hearing or a copy of the complete printed remarks.

"Mr. Chairman, and members of the committee, thank you for the opportunity to attend and testify at this hearing on economic and security concerns in tourism and commerce. The mission of the ATA is to assist in balancing the interests of consumers and legitimate businesses using contact centers to promote the public interest.

Consumer protection is of paramount interest to the members of the ATA. For this reason, ATA members are advised and required to conform to a strict code of ethics including compliance with federal and state laws. The ATA has also worked to create an accreditation process for contact centers including third-party audits to insure that firms are complying with these laws and to promote best practices in compliance and consumer protection. The ATA's Self-Regulatory Organization has received early praise from both the Federal Trade Commission (FTC) ([News - Alert](#)) and the Federal Communication Commission (FCC) in their public comments regarding the direction of the teleservices channel and its alignment to meet consumer needs...

Disclosures to comply with these current federal and state laws require identification of the caller, the entity engaged in the call, the purpose of the

call, and the nature of the goods or services. Additionally, there is a requirement to transmit the calling party number and the company name to be retrieved by a customer using caller identification technology.

The particular type of disclosure contemplated by H.R. 1776 is a burdensome additional disclosure without clear benefit to the consumer. Each time additional disclosures or compliance requirements are added to the call, call lengths are increased, and the cost of doing business by phone increases and the quality of the interaction with the consumer declines. The rising costs of compliance and regulation are causing many firms to contemplate automation only, or offshore solutions to stay cost competitive...

A term of the industry which has appeared frequently in print is "rightsourcing". In short, the concept is that the customer type, type of call for sales or service, and location of the personnel are intertwined with profitability and long-term customer satisfaction. It is with no small irony, that we are beginning to see companies from Spain, France, and Australia choose U.S. contact centers to handle calls on their behalf because of both expertise and labor costs.

There are a number of options to requiring location disclosure at the beginning of the call. The ATA believes that a reduction in overall compliance costs could be a means to make domestic contact centers even more affordable.

Exclusive federal jurisdiction alone could reduce the costs to industry by an estimated \$200 million or more per year and make onshore solutions more desirable. By creating one set of laws, firms would no longer have to manage to an impossible patchwork of overlapping and sometimes contradictory rules.

A second option would be to conduct a more comprehensive study of the costs and benefits of creating location disclosure. No substantive information is available to determine what trends exist, and it is quite possible this legislation is unwarranted and unneeded.

Finally, consumers should have a choice to know of the location of a company's contact center if they are interested. No federal law currently exists, which mandates that an entity disclose a contact center's location upon request. The American Teleservices Association Self-Regulatory Organization requires firms that seek accreditation as best practices providers to disclose their location when asked. The ATA would be very supportive of turning this practice into law.

ATA believes the current disclosures required by the TSR ([News - Alert](#)) and TCPA are adequate for contact centers to conduct business effectively while keeping consumers informed of their rights. However, the consumer has the right to know, upon request, the location of a call center."

*— Tim Searcy serves as the CEO of the American Teleservices Association*





# Jabra

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Keith Dawson, SENIOR ANALYST, FROST & SULLIVAN



## Who's in Charge?

**I**t used to be that the people who bought technology and equipment for contact centers were professionals in the art of running those centers — they were people with some kind of direct telecom or operations experience. Those days are long gone.

Now, important decisions are made by teams of people from different disciplines within an organization. The contact center practitioner is indeed one of the people on that team, but he or she is no longer the only voice in the room when important tools like call routing engines, analytics and reporting, and even workforce management are evaluated.

The question of who is in charge of these purchasing decisions is slippery, because no two companies (and no two technology spends) are the same. Unique circumstances come into play each time. But we do know that there are increasingly varied stakeholders in the outcome of those decisions. Interested parties now include IT managers, marketing and finance executives, line of business managers, and other constituents who have serious stakes in how contact centers use their tools.

And not only are they more interested in the outcome, but the technologies used in centers today are much more entwined with systems used elsewhere in the organization. Data is shared by different systems in different departments, and it travels over unified communications networks that tie siloed organizations together. Even if organizations are slow to realize it, their contact centers are in fact much more thickly tied to the rest of the enterprise than in the past.

With the landscape changing so quickly, it bears looking at who those various stakeholders are. From the point of view of the contact center executive, the more you know about the fundamental interests of your colleagues around the decision table, the better you'll be able to look out for your own interests. An IT manager looks at a possible technology purchase through completely different eyes from a contact center manager: different ROI, different feature criteria. Are you defining success differently, as well?

Start with IT. The interests of an IT manager lie in how it will affect the company's network

and how much it will cost to deploy and support. To some extent that dovetails rather nicely with the kind of operational viewpoint prevalent in contact centers, where the primary metrics used are those that measure activity rather than outcomes. And because IT has been working closely in tandem with contact centers for years (most notably on the deployment of IP telephony networks and CTI systems ([News - Alert](#))), there is a fair amount of understanding between IT management and contact center management. They don't always have the same objectives, or speak the same language, but they largely comprehend each others' point of view.

Where things get messy is when marketing and line-of-business managers get involved. Marketing and finance are used to using technology to understand what business conditions are like. They use analytical tools to slice apart their data sources and find out what motivates customers, prospects, and partners. They have vast experience with tools, like business intelligence systems and market modeling systems that tell them whether the company's activities are in lockstep with the company's goals. The difference between what they do and what the contact center does is the difference between strategy and tactics — so when the contact center managers start to talk about ROI in terms of call avoidance or improvements in average speed of answer, they seem irrelevant. What's relevant in the overall corporate context are revenue, profit, value and outcome. Activities (like call handling) are just a means to get to profit and value.

It's not that the different professionals are trying to reach different goals, it's that the language used to express progress towards those goals diverges, making it difficult to agree on whether a technology spend is worthwhile or not; whether it is needed now or next year.

We are starting to see the mass adoption of contact center tools in non-contact-center contexts. Analytics-driven performance management is one strong example. But

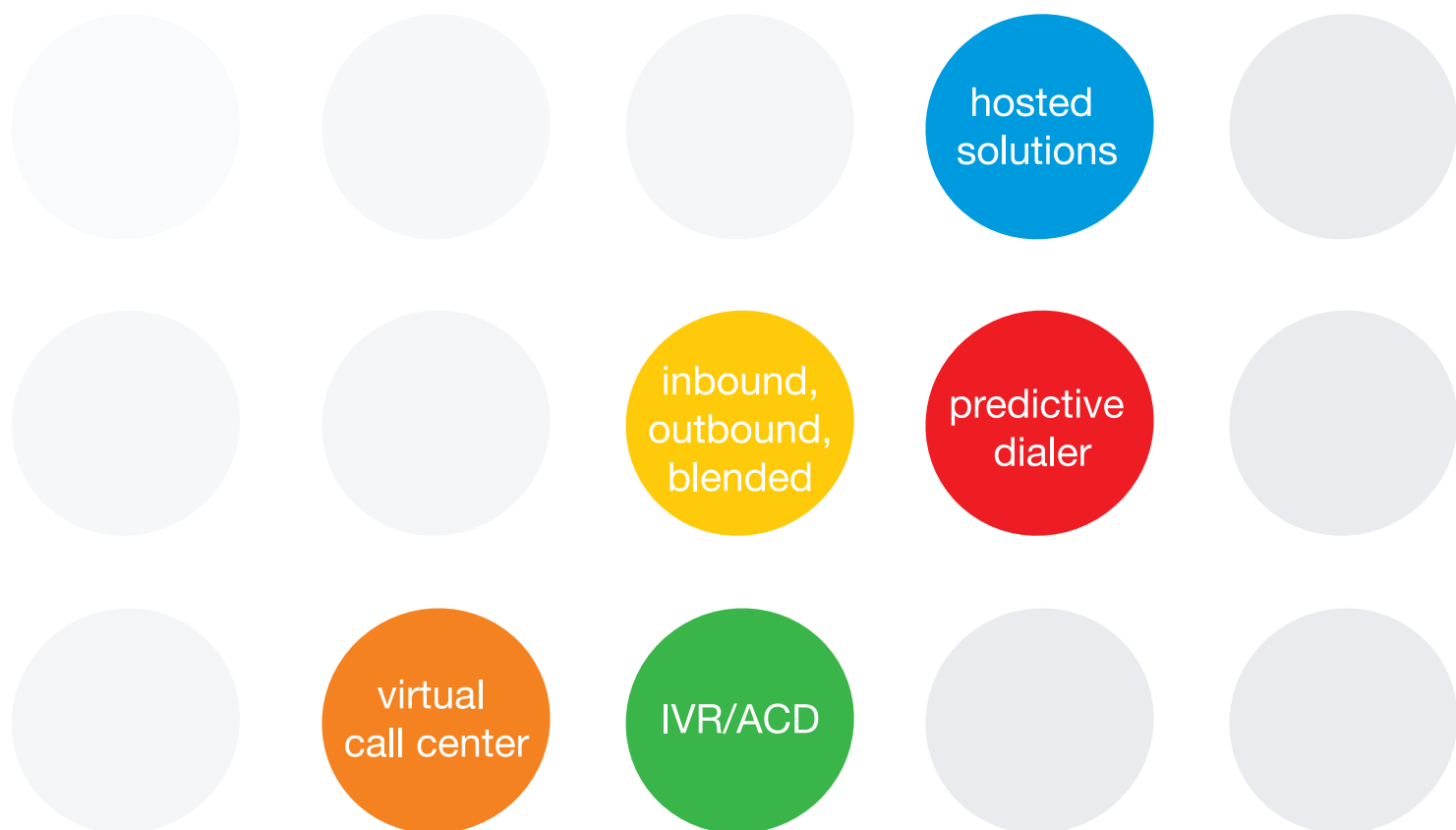
even something as mundane and mature as workforce management software is now in the inter-departmental mix. WFM does three things really well: forecasts volume, creates schedules, and measures adherence to those schedules. It's recently dawned on a lot of managers of back office and retail employees that they can be effectively scheduled (and have their work parceled out to them in neat blocks) using automated software. And so WFM vendors are looking at expanding into those areas of the organization. It hasn't hurt that by some estimates there are three to five times as many schedulable workers in those environments than there are in contact centers. One major vendor is already seeing 40% of its WFM revenue coming from outside the contact center.

What does that do to the contact center manager who's historically been responsible for purchasing the tool? It forces that manager to consult with other operations managers who also need the system when spec-ing it for the vendor. But it also spreads the possibility for ROI among a greater number of stakeholders. So while it makes some internal conversations more complex, it also brings opportunities for collaboration.

The idea of collaborating with colleagues in other departments isn't new, but it is newly urgent. Because when one group defines success differently from another in the same organization, you have a recipe for friction and discord. What's of paramount importance in the center is for the managers there to have a good handle on how the contact center contributes real value to the overall health of the organization. That's the argument that's going to carry weight among the decision-makers. And when the organization is convinced that the center is a critical element in company health and profit, then the organization will surely commit resources to protect and grow that center.

*Keith Dawson is Principal Analyst, Frost & Sullivan*





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[www.tmcnet.com/2528.1](http://www.tmcnet.com/2528.1)

## ENVISION TELEPHONY LAUNCHES CENTRICITY

Envision Telephony has launched Centricity, its new contact management solution. Centricity, which is made up of Envision's Click2Coach meshed with analytics, performance management and workforce management tools, gathers and aggregates information for proactive, predictive and preventive contact center and enterprise decision making. Centricity features a powerful new analytics tool that gives diagnostic and prescriptive information. It can pull, assemble, and present data from virtually any relational data source, enabling users to input data specific to their businesses. Giving users that view is a customizable dashboard where everything is displayed and where all the work can be done from. Real-time capture of agent interactions allows users to identify skill gaps and deliver timely information that leads to insight and profitable action. Making Centricity even more flexible and user-friendly is its new Web-based architecture, which avoids having to install or download client footprints.

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

[www.tmcnet.com/2529.1](http://www.tmcnet.com/2529.1)

## CONVERSIVE INTRODUCES AUTOMATED CHAT SOLUTION

Live chat, long one of the most expensive means of interacting with customers, is set to become faster, more accurate, less costly, and user-friendlier, and therefore more popular thanks to a new set of automated chat solutions from Conversive. The Conversive software leverages an organization's knowledge base of products, pricing and procedures into enabling them to create automated responses instantly to routine questions in a conversational format. It provides highly accurate and context-sensitive answers to queries. To personalize and humanize the chat experience, and retain customer interest, Conversive offers a stationary or animated avatar along with recorded voice or text to voice for them. For more complex inquiries that require live agent intervention, the Conversive solution permits seamless transfer of contacts and the interaction records to the staff, who can pick up where the application leaves off.

Customers get all the answers and attention necessary, thereby reducing expensive calls or worse yet dropped interactions and shopping carts.

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

will earn credits for advertised incentives. The benefits include shortened sales cycles and reduced marketing costs per lead generated.

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

[www.tmcnet.com/2530.1](http://www.tmcnet.com/2530.1)

## MYNDNET INTRODUCES SOCIAL NETWORKING LEAD EXCHANGE

Myndnet has developed a new lead-generating social media platform to enable organizations to reach into existing communities and provide incentives for their members to participate in that site in exchange for valuable data to generate more qualified leads. Myndnet works by firms creating profiles and network on Myndnet, inviting members from their community to their network, and creating campaigns requesting leads matching specific qualification criteria offering incentives for accepted responses. The campaigns are posted on their companies' profile page and members are periodically notified of them. Members of the network respond to these requests with contact information of prospects meeting the qualification criteria and introductions. Firms have the option of rejecting responses that do not meet the criteria. Members who provide accepted responses

[www.tmcnet.com/2532.1](http://www.tmcnet.com/2532.1)

## PRESENCE INTRODUCES VERSION 7 OF CONTACT CENTER PERFORMANCE PRODUCT SUITE

Presence Technology has announced version 7 of their product suite, which is designed to improve its scalability and integration capabilities. It includes new architecture developed on Presence OpenGate 7, which is powered by Asterisk that allows customers to achieve high simultaneous calls and agent volumes. Version 7 has also improved the geography or 'reach' of the product suite. The solution offers the ability to transfer interactions, and the associated information, between two different Presence Server Entities connected to the same PBX. The Presence Recording System includes an option to record the call conversation remotely using VoIP. This latest version also offers a new module that allows simultaneous screen capture of the agents' desktop while the conversation is being recorded. Version 7 also offers improved interoperability, which increases the

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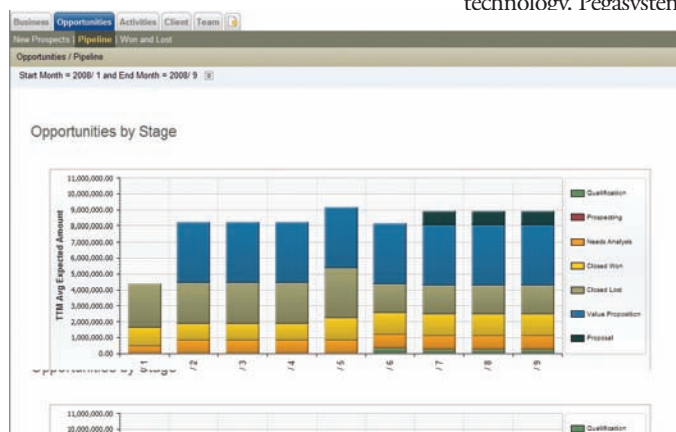
compatibility with the relational databases.  
[www.presenceco.com](http://www.presenceco.com)

[www.tmcnet.com/2533.1](http://www.tmcnet.com/2533.1)

## AVATURE RELEASES RECRUITING CRM

Avature, a global recruiting services company providing research and sourcing services and human capital management software, has launched Recruiting CRM, a customer relationship management solution constructed specifically for recruiters. With Internet spidering, e-mail threading, SMS communication, tagging and tag clouds, Boolean and Custom Operators, Live Search, and other advanced Web 2.0 features, Recruiting CRM offers advanced sales and contact management features to the recruiting software marketplace. The solution is highly customizable, including an optional Office of Federal Contract Compliance Programs compliance module, multiple language configuration, and intelligent parsing algorithms that can learn any language and adjust to international resume formats and styles. Recruiting CRM's analytics dashboard offers advanced relationship management, interactivity with social networks, and real time recruiter collaboration. The system is HR-XML compliant, which simplifies integration with legacy HR systems.

[www.avature.net](http://www.avature.net)



[www.tmcnet.com/2531.1](http://www.tmcnet.com/2531.1)

## BIRST BI SOLUTION BURSTS ON MARKETPLACE

Obtaining business intelligence (BI) is no longer for large enterprises, thanks to Birst, which is a new BI solution

launched by Success Metrics, aimed at small/medium-sized businesses (SMBs) and individual professionals. Birst enables these firms and individuals to mine data for BI to accomplish a myriad of purposes including understanding needs of customers, responding to business opportunities, analyzing impacts of pricing and promotions, and budgeting and forecasting. Birst is fully automated and hosted and handles any type of data, including finance, operations, marketing, customer service, and sales information. Its format is flexible. It accepts columnar data held in csv, Access databases, or Excel files. Birst is fast and easy to set up. Within a few minutes of signing up and uploading data, users can create their own reports and analysis. Birst can even automatically create some dashboard reports.

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

[www.tmcnet.com/2535.1](http://www.tmcnet.com/2535.1)

## PEGASYS SYSTEMS ANNOUNCES CLOUD-ENABLED BPM PLATFORM AS A SERVICE (PaaS)

Pegasystems has launched a Business Process Management (BPM) Platform-as-a-Service (PaaS) offering that gives enterprises the benefits of Software-as-a-Service (SaaS) without the limitations, risk, or performance concerns of traditional SaaS technology. Pegasystems' BPM PaaS is tar-

geted at corporate organizations and business process outsourcers who desire to take advantage of a SaaS model while also utilizing the power of their internal integration and infrastructure. Pegasystems leapfrogs existing SaaS technology ensuring integra-

tion, security, visibility, and reliability that other SaaS offerings do not provide. The Pegasystems BPM PaaS offers a thin client development environment and full Web-based user interaction, capability for end-to-end BPM development and execution, multi-tenant capability, an in-house BPM

SaaS capability with all of the security and integration of data center infrastructure, and elimination of information silos caused by externally hosted SaaS applications.

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

[www.tmcnet.com/2536.1](http://www.tmcnet.com/2536.1)

## NOBLE SYSTEMS INTRODUCES NEW WORKFORCE MANAGEMENT SOLUTION

Noble Systems Corporation has unveiled a new comprehensive workforce management system, Noble WFM. The new solution offers forecasting, scheduling and staffing management for centers of all sizes. Some of the key automating abilities of the system include: accurately forecasting call volumes; flexible scheduling processes for both call and non-call activities and for both call center and back-office personnel as well as produce reports that measure agent and center performance. The Noble WFM is available as an integrated component of the unified inbound and outbound Noble Solution suite. The Noble WFM system will also become the foundation of the Noble Workforce Optimization (WFO) Suite, which can integrate workforce management with company's quality assurance, scorecard and speech analytics tools. All these features will facilitate contact center management with total visibility into quality and performance.

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

[www.tmcnet.com/2537.1](http://www.tmcnet.com/2537.1)

## DATATEL LAUNCHES IVR SERVICES IN CANADA

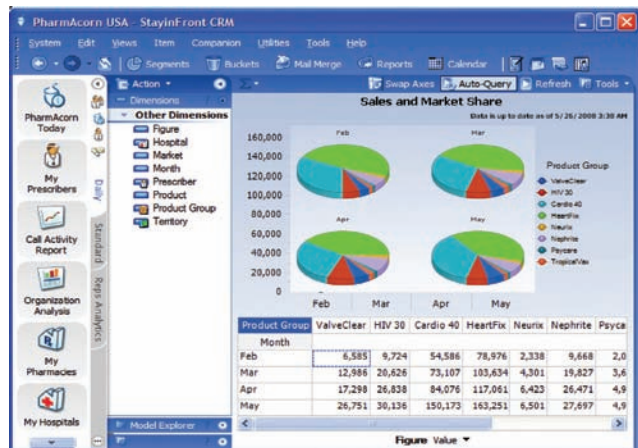
DATATEL is launching a new portfolio of IVR hosted services for its customers in Canada. Datatel aims to provide services to its clients anywhere in Canada, and receive traffic from any Canadian carrier which can link to Canadian payment processing providers, interface with Canadian mobile operators, and provide solutions tailored to regional needs. It says it can deliver all the services an organization will require for a successful IVR strategy execution which includes planning, design, development, implementation, hosting, dedicated application support and management services. Datatel's IVR Account Management Suite handles in-bound calls to check balances,



check transactions, manage personal information, deliver account information, activate cards, and respond to other trans-

[www.tmcnet.com/2538.1](http://www.tmcnet.com/2538.1)

## SIEMENS ENHANCES OPENScape CONTACT CENTER PORTFOLIO



actions requests. It connects to real-time to web-enabled database by capitalizing the existing web infrastructure and skills.

[www.datatel-systems.com](http://www.datatel-systems.com)

[www.tmcnet.com/2534.1](http://www.tmcnet.com/2534.1)

## CRM 11 VERSION UNVEILED BY STAYIN-FRONT

StayinFront has announced the unveiling of the newest version of its flagship product, StayinFront CRM 11. The product builds on the capabilities of CRM 10, used by customers in the manufacturing, pharmaceutical, healthcare, consumer goods and financial services industries. StayinFront CRM 11 combines CRM and analytics into one tool making business intelligence data accessible without the high cost of configuration usually associated with business intelligence projects. The analytics application integrated into StayinFront CRM 11 is also available as a standalone application. StayinFront Analytics is designed specifically for non-technical users with drag, drop and drill technology for analyzing sales, marketing and financial information from any database. StayinFront CRM 11 uses a multi-layered architecture coupled with object-oriented data modeling, providing flexibility and configuration capabilities while preserving the ability to upgrade.

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

enabled by an IVR solution, is an important tool for today's contact centers. However, the cost of stand-alone IVR systems can be too high for many businesses, which makes a hosted solution a cost-effective choice. This has been achieved by partnering with Contact Solutions Inc (CSI). The combined offer from Siemens and CSI will include integrated contact automation, platform management, robust reporting tools and enhanced caller interaction, all on a per-minute or per transaction pricing model. In addition, since OpenScape is an open solution, the new offer will facilitate integration when live agent interaction is required.

[www.enterprise-communications.siemens.com](http://www.enterprise-communications.siemens.com)

[www.tmcnet.com/2539.1](http://www.tmcnet.com/2539.1)

## DRISHTI LAUNCHES DACX AMEYYO WITH IP-PBX, IVR FOR CONTACT CENTERS, ENTERPRISES

Drishti-Soft Solutions, a communications solutions provider, has launched a comprehensive communications suite, DACX Ameyo, for emerging contact centers and enterprises. The service-oriented architecture and model-driven, architecture-based technology platform offers telco-grade reliability, scalability, rapid application development, deployment flexibility along with multi-tenancy capabilities. The products introduction follows what company officials call the successful launch of their flagship product, the DACX Contact Center Suite. The suite has been deployed in enterprises in India and

Philippines in the past two years.

[www.drishti-soft.com](http://www.drishti-soft.com)

[www.tmcnet.com/2540.1](http://www.tmcnet.com/2540.1)

## SALESFORCE.COM CUSTOMERS TO USE BOLDCHAT MODULE

Bravestorm, the developers of BoldChat, a solution for live chat, e-mail management and click-to-call functionality, announced the availability of its BoldChat module for Salesforce CRM. Bravestorm ensures that Salesforce customers can improve conversions by 20 percent using the Boldchat module. It leverages SmartInvite proactive invitations and well placed chat buttons to chat with more visitors. The application automatically creates cases in Salesforce CRM from live chat interaction, with wizard-based installation that makes integration seamless. Comprehensive data from each chat, including complete transcripts, are available as a result. It even includes detailed information such as geo-IP data. In addition, the chat is automatically associated and assigned appropriately within Salesforce.

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

[www.tmcnet.com/2541.1](http://www.tmcnet.com/2541.1)

## ADAPTIVE ROLLS OUT CONCOURSE 3.0

Adaptive Engineering has rolled out Concourse 3.0, the newest version of its unified communications solution that features improvements designed to help users, including contact center staff, more effectively connect with each other. Concourse 3.0 provides a more secure internal communications method compared with traditional instant messaging tools that rely on the public (and vulnerable) Internet. Concourse resides inside the corporate firewall. Messages are encrypted and users are authenticated via LDAP/Active Directory, enabling enterprise single sign-on. With Concourse 3.0, users and administrators will experience more streamlined visuals and increased messaging functionality, including broadcasting and multimedia. Administrators will have more remote



## New Research: Contact Centers Evolve with New Customer Demands and Solutions

**M**iercom, a testing lab partner with TMC, has performed an extensive analysis of solutions aimed at meeting the demands of customers for improved inbound and outbound live and automated service through traditional channels: voice and e-mail and in new ones: SMS, chat, and video.

Here is a synopsis, highlights, and excerpts of this research, prepared by Rob Smithers CEO of Miercom and Ed Labanca, Senior Analyst for UC and Contact Centers. The full paper is available at [www.tmcnet.com/2588.1](http://www.tmcnet.com/2588.1).

– Customer satisfaction metrics and their correlation with financial performance

Customer satisfaction is primarily a measure of the customer experience. Research has shown that this directly correlates with financial performance: the better the customer satisfaction, the better the long term bottom line results for the company.

Customer interaction via contact center systems and applications has a direct impact on customer satisfaction. Figuring out ways to improve customer's phone and multi-media communications experience including self-service with the right personal touch can make all the difference. Parallel and converged evolution is occurring with computing and telecom platforms and applications.

– Communication and media servers and associated applications can now be implemented virtually without limitation to geographic placement

This enables an organization to:

- Pool technical and human resources throughout the enterprise including contact centers

- Use 'Presence' information to reach personnel via the preferred mode of communication based on knowing in advance an individual's accessibility over multiple devices
- Improve the overall user and customer experience, with personalization and dynamic interactions or "treatments" for better phone and synchronized web applications
- Facilitate efficient and effective collaboration including knowledge experts throughout the organization
- Consolidate and extend application and management systems
- Reduce carrier costs
- Enable executives to more readily automate business processes, and facilitate corporate initiatives such as joint venture or merger and acquisition activities

– Aspect ([News](#) - [Alert](#)) Software: Best Supervisor and Real-time Monitoring / Reporting Capabilities

Aspect® Unified IP™ 6.5.1 is aimed at providing a migration from its legacy and ACD, predictive dialing and Aspect EnsemblePro™ systems. The Aspect Unified IP product line incorporates universal administration, queuing, reporting and multi-media communications which also includes web chat, e-mail, IVR, and automated workflow distribution.



Aspect Unified IP offers unified management and supervisor capabilities through a recording and quality management and unified command and control (UCC) enterprise multi-platform/vendor real-time data aggregator. It also offers consolidated routing rules across multiple communication channels through a single set of business rules, enabling administration and reporting across a wide range of applications.

Supervisors have centralized multi-site, enterprise-wide capabilities through multi-system provisioning, enterprise monitoring, enterprise reporting, enterprise recording, and disaster recovery for replicating data across multiple systems. Supervisors can create custom real-time displays or canvasses.

For companies seeking recording and speech analytics, quality management, performance management, and coaching capabilities, Aspect Software offers the PerformanceEdge™ ([News](#) - [Alert](#)) suite, bringing together Aspect eWorkforce Management™, Aspect Quality Management™, Aspect Performance Management, Aspect Campaign Management™ and coaching and eLearning capabilities.

Aspect has worked with a third-party consulting company to optimize its user-interface designs. One customizable user-interface provides seating charts with system information and statistics on specific agents





and groups at various sites providing the ability to drill down for more granular information. Executives can create dashboards and tickers to monitor real-time activity for the various contact center systems.

Aspect's UCC leverages all fixed granular data elements occurring in the contact center environment and is used to launch Aspect's Unified Director to monitor and manage changes in real-time. Unified Director provides a customizable single supervisor interface for all components.

For these reasons, including the fact that Aspect's UCC can operate stand-alone with disparate systems, we feel that Aspect does provide the best Supervisor and Real-time Monitoring and Reporting Capabilities, especially in large contact center environments or those involved in merger and acquisition activities.

– Avaya ([News](#) - [Alert](#)): Best Voice Portal / Interactive Voice and Video Response (IVVR)

Avaya Call Center and Interaction Center 7.1 software, coupled with the Avaya Communication Manager runs on a Linux based appliance capable of all TDM or all IP with media encryption and server isolation – or a combination of TDM and IP.

Interaction Center is the Avaya customer suite platform for enterprise class management of multi-media communications: voice, video, e-mail, web chat and IP-telephony. It includes SIP services and introduces several enhancements that optimize contact management and offer greater agent effectiveness. Voice, e-mail, web chat are managed based on a single set of business rules to ensure consistent service

One of Avaya's competitive differentiators is massive scalability: the ability to support 10,000 agents on a single server. With this what Avaya calls 'flatten, consolidate, and extend' or FCE model it is easier to provide the right agent "on demand". Contact center-based agents can provide expertise and overflow for branch-based customer service personnel. Inbound customer contacts can be routed to branch-based personnel according to skill set, availability or prior contact history. Organizations are able to use a common business model, yet maintain personalized identities at the branch offices.

By using a global "single queue", personnel at other locations can be leveraged as expert resources. With FCE companies can do more with decreased infrastructure, thereby reducing the total cost of ownership. Organizations are able to support consistent processes and brand images across the enterprise.

Avaya is paving the way with interactive video, including the use of 3G video cell phones, Internet videophones, and video-enabled personal computers. By using video in addition to the voice portal's speech recognition capabilities, application developers can show callers menu choices, product options, instructional video clips, as well as dynamic information such as personal account information, airline flight options, and current stock prices.

Avaya has extended its Eclipse-based application authoring tool, Dialog Designer, to support the creation of voice and video applications directly, including full voice and video application testing on the developer's workstation. This makes it easy for a voice application developer to extend his skills into voice and video application development.

We believe Avaya's IVVR is the best voice portal based on these extended capabilities.

– Interactive Intelligence ([News](#) - [Alert](#)): Best All-in-One Multi-Media IP Contact Center

Interactive Intelligence's Customer Interaction Center (CIC) 3.0 product suite leverages standard servers and SOA while increasing reliability, security and scalability. It removes the need for costly voice cards and improves reliability by eliminating multiple points of failure.

CIC 3.0 scales up to several thousand agents and between 5,000 and 15,000 enterprise users per server. The product suite is localized in 18 different languages. Interactive Intelligence products include reduced integration requirements, centralized multi-channel processing and inbound / outbound blending, and single point of administration for all of their components.

CIC 3.0 is offered in both premises-installed and hosted versions. It supplies ACD multimedia queuing, CTI ([News](#) - [Alert](#)), IVR/speech recognition, outbound

dialing in preview, power, predictive, precise, and agentless [automated] modes, and workforce management. It also offers many other products, among them:

- Business Process Automation (BPA)

BPA extends from the Interactive Intelligence single-platform architecture, which incorporates multi-channel queue management services for workflow automation

- e-FAQ®: a tool that incorporates linguistic analysis, semantic word-net, or keyword searches as opposed to more complex case-base reasoning (tree mechanism).
- Interaction Administrator®: a single administrative interface to configure local and remote users, lines, stations, IP networks, SIP device and digital phone connections, security access, make moves/adds /changes
- Interaction Designer®: an extensive tool set for designing applications such as IVR, workflows, and ACD multimedia queuing
- Interaction Director®: provides pre and post-call routing and load balancing across multiple sites
- Interaction Feedback®: an automated, configurable customer satisfaction survey module that enables organizations to accurately measure customer service levels in a timely and cost-effective way
- Interaction Gateway™ ([News](#) - [Alert](#)): a 1U rack-mountable SIP appliance
- Interaction Recorder® – provides a non call-blocking environment vs. integrated 3rd party products. It includes multi-channel recording, screen recording, and agent scoring for all media types. The Interaction Tracker™ application can archive complete contact and interaction histories with individuals.

Due to the fact mentioned at the outset, namely all of the above applications are an integral part of the Customer Interaction Center 3.0 foundation; we feel that Interactive Intelligence does provide the Best All-in-One Multi-media Contact Center.

### Contact Center Update

In his Communications and Technology Blog, Rich Tehrani writes:

There are some very positive contact events worth sharing. The first bit of news has to do with how Voxify helped callers prepare for hurricanes Gustav and Ike. Voxify used its managed speech solutions to help hotels and airlines handle massive call volumes which peaked as the hurricane got closer. Callers not only made calls to reserve rooms and forms of travel, they also called to reconfirm reservations.

In other good news, AT&T has opened a call center in Detroit, Michigan to provide DSL service and support. This is an important move as it follows a pattern of other companies moving jobs from other countries back to the US. It should be mentioned the contact center industry can do wonders for the midwest where many manufacturing jobs have been lost.

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

### Allegiance Study

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

Charging that marketers "often ignore a critical measurement -- customer attitudes and emotions -- when examining customer behavior," Allegiance, a vendor of enterprise feedback management products, is offering "Do You Know Why Customers Really Buy," described as a white paper explaining "how new feedback technology can provide essential attitudinal data to help determine how to present the right message to the right customer at the right time."

Most businesses focus on geographic, demographic or psychographic data to analyze customer behavior, the study finds adding that "many use systems such as Customer Relationship Management (CRM) to track customer transactions. However, an attitudinal approach to modeling behavior uncovers the reasons why people do what they do."

The purpose of the paper, its authors say, is to understand the "spark" of the relationship and what role emotion plays in customer decision making. "For example," they write, "what was it that interested them in the first place, and what drives them to remain interested and engaged? This information can be uncovered by asking attitudinal questions in the feedback process."

"Attitudes reveal the softer side of the business relationship. Knowing why customers do business with you is critical to maintaining that relationship and to adding new customers in the future," said Chris Cottle, vice president of corporate marketing for Allegiance. "Businesses can use feedback management, both solicited and unsolicited, to understand customer attitudes and increase engagement, which is the emotional connection to a company or brand."

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

### Fonality Targets Call Centers with Advanced Call Center Features

In his VoIP & Gadgets Blog, TMC CTO Tom Keating writes



I met with Fonality CEO Chris Lyman at ITEXPO and he gave me a demo of HUD 3.0, which includes some very advanced call center features. HUD 3.0 now not only displays the queues, but it lets you drag-and-drop individual queues off the main HUD client onto your Desktop allowing managers and agents to focus on specific queues of interest. The new version

features important statistics such as abandonment rate, average speed of answer, and more. You can see all of your agents in a particular queue and they are

color coded to indicate their status (on internal call, on queue call, etc.)

One critical feature is that if a call is not being answered, it immediately broadcasts a toast popup window to all the agents in the queue and allows an agent to take the call before it is abandoned. Chris told me this feature has even helped to dramatically reduce the abandonment rate internally at Fonality for their support and customer service queues.

The advanced queue features in HUD 3.0 should really open the door for Fonality to go after medium-sized call centers that require real-time queue statistics and other advanced call center functionality.

Visit Tom's blog at <http://blog.tmcnet.com/blog/tom-keating/>





## Introducing the Outbound Call Center Online Community

Five9's solutions deliver the benefits of million-dollar systems, but without their hidden costs. Five9's predictive dialer efficiently and effectively helps manage product campaigns, generate sales leads, process account collections, raise funds, administer research surveys, and conduct political and community initiatives. Outbound Call Center campaigns also help increase agent productivity, improve sales results, lower infrastructure costs and increase business agility.

Call centers around the world count on Five9's Outbound Call Center software for more profitable and productive outbound campaigns.

- Free consultations
- Free trials
- Free quotes
- Feature articles
- Case studies
- Technology briefs

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## CRM Dogma Explained: “Executive Buy-In”

**Y**ou’ve no doubt heard that if you don’t get executive buy-in for CRM it’s going to fail. But is executive buy-in really all that important? Let’s play fill in the blank. Read the following four paragraphs and see if you can complete the last sentence. Hint: Use the word “guillotine” in your answer.

There’s a problem the organization identifies as critical — critical enough to change the way things are done and challenge the entrenched interests in the organization, which have contributed, mostly indirectly and not maliciously, to the crisis. A plan to attack the problem is drawn up. It looks like it’ll work if it’s enforced across all departments.

Someone is put in charge of the effort. He runs into opposition from the entrenched interests, and it’s soon clear that he needs the authority of the chief executive in the organization to accomplish reform and save the organization.

The chief executive needs the vision, confidence and sense of urgency of what’s at stake to let it be known that opposition to the reform program will not be tolerated in the organization.

**The chief executive needs the vision, confidence and sense of urgency of what’s at stake to let it be known that opposition to the reform program will not be tolerated in the organization**

The chief executive flubs it, and says basically “You do the best you can, but I’m not putting my neck on the line.” Hence reform is not implemented, entrenched interests win the day and, if anything, are more emboldened and inoculated against further attempts at reform, knowing the chief executive isn’t going to go to the mat for it.

The result is that \_\_\_\_\_.

Done? Read to the end for the correct answer.

In the 1780s France, which is to say the court of King Louis XVI, identified a critical problem: They needed discipline over their finances.

The man they had in the job of Director-General, Jacques Necker, was probably the most gifted public financier of his day. He drew up a brilliant reform plan, and historians today

generally agree that had the reforms been enacted the court’s finances would have had a good shot at regaining equilibrium and maybe the country would have avoided the bloodbath of the 1789 Revolution and subsequent Terror.

For reforms so far-reaching and fundamental Necker needed executive buy-in from the very top, King Louis XVI himself. Simon Schama, in his unequalled *Citizens: A Chronicle of the French Revolution*, writes that Necker, astutely, “had always argued that broad political support was indispensable to the success of any serious reform program.”

Indeed. “The king” is what was meant by “broad political support” in Bourbon France in 1780. Louis XVI needed to publicly back Necker and the reforms with the very power of the throne itself, since the reforms included measures designed to curb the privileges of the nobility and attack the little fiefdoms aristocrats had erected for themselves. Without muscular royal buy-in the reforms were not worth the parchment they were written on.

Let us know when this starts sounding vaguely familiar to how things work in your company.

A Protestant from Geneva, Necker was an outsider in the French Catholic court — he wasn’t even accorded the C-level title “Controller-General” which a man with his duties and powers normally would have been granted, but the slightly lower title “Director-General.” He had implemented some reform on the strength of that, but to really crack the core of the problem — the national budget and tax system — to cut across the departmental boundaries and entrenched interests he needed *de facto* royal power.

And it’s not that Louis XVI was opposed to the ends Necker sought to achieve. “I wish to put order and economy in every part of my household,” the king, a man not given to demonstration or histrionics, told the Duc de Coigny one night, “and those who have anything to say against it I will crush like this glass,” throwing a goblet to the floor.

But Louis XVI lacked the vision and the critical sense of just how bad things really were, of the stakes in play, and





didn't buy in. In May 1781, Necker, his reforms frustrated by entrenched interests and a host of enemies made by his budget-cutting, asked the king to make him a member of the royal council for the power he needed to push reform through.

Louis XVI refused. Necker, knowing his was now a hopeless task, resigned, and with his departure went the last hope France had for solving the pain that had given rise to the reform effort — bringing its ruinous finances into line. As Schama writes, "The fiscal exhaustion... which in effect precipitated the French Revolution, was directly attributable not to Necker's wartime funding of 530 million livres but to the peacetime loans of his successors, and to their wholesale abandonment of his economies."

So let's run over that again, shall we? There's a problem the organization identifies as critical — critical enough to change the way things are done and challenge the entrenched interests in the organization which have contributed, mostly indirectly and not maliciously, to the crisis. A plan to attack the problem is drawn up. It looks like it'll work if it's enforced across all departments.

Someone is put in charge of the effort. He runs into opposition from the entrenched interests, and it's soon clear that he needs the authority of the chief executive in the organization to accomplish reform and save the organization.

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opposition to the reform program will not be tolerated in the organization.

The chief executive flubs it, and says basically "You do the best you can, but I'm not putting my neck on the line." Hence reform is not implemented, entrenched interests win the day and, if anything, are more emboldened and inoculated against further attempts at reform, knowing the chief executive isn't going to go to the mat for it.

The result is that the organization totters on a while longer until rivers of blood flow in the streets and the chief executive, his ministers and associates are carted off in tumblers to the guillotine where their heads are hacked off for the amusement of the crowd.

Has your organization gotten to that final sentence — yet?

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# Real-Time Data, Real Time Results

**T**he ability to effectively serve customers, individuals and organizations alike requires that contact centers have information that is or as close to real-time as possible i.e. real-time data. The more accurate and complete that information is the better contact centers know their customers the greater the likelihood that customer needs will be met, whether the contacts are customer-or organization-initiated.

Obtaining that knowledge requires careful analysis, and investment in the tools and effort to perform this function. Direct response and outbound telemarketing-delivered offers and lists must be precisely targeted to obtain results and to avoid annoying customers and prospects.

At the same time there are limits to what customers want organizations to know about them, and on where that data, and customers can be found. There have been growing consumer privacy concerns and resistance to using social networking sites as marketing channels.

In response, we asked several leading professionals to comment on data handling, privacy laws, list acquisition and scrubbing/appending, effects of new channels such as SMS and social networking, and on breaking down the silos to access data in realtime. Here are their responses:

## AperioCI ([www.aperioci.com](http://www.aperioci.com))

Paul King ([News](#) - [Alert](#)), President and COO

The first challenge is getting the data and ensuring it is complete. This is a large undertaking requiring skill at data management due to the large quantities of data, privacy policies and adherence, and accuracy of results dependent upon complete data to analyze. Second, the analysis needs to be actionable. That means it needs to be ready for use and presentation to the customer directly, such as through a web portal or to a retail or customer service rep, such as in a contact

center. Too often, operators spend enormous amounts of time and energy collecting and analyzing data but not applying it back to the front office or customer directly.

We analyze customer history to better understand not only what offers to make, but also to know through which channel it should go to best deliver it to that customer. This allows for direct mail, text messaging, and contact center interactions that are all dependent upon customer preference. Offers can be timed to ensure that contact centers can adequately handle the response rates so customers do not suffer a bad customer service experience. It is also vitally important that the contact centers have the tools and offers available to them to interact with the customer in an intelligent way.

There is a constant process in place to coordinate customer additions/subtractions/modifications to ensure the responses and offers are accurate and on target. We have the capability to not only track when, what and how the offers were delivered, but also to measure take up rates and track customer usage afterwards to know if the service is used or not. Up-selling a service that is subsequently not used by a customer generates a higher propensity to churn.

Used properly, information from diverse channels like SMS and social network



presents opportunities for operators. The social networking side of things allows for a new service to be picked up and communicated more quickly and cost effectively by targeting new services to the influencers and letting them stimulate take up rates and usage through networking with colleagues and other social network members. In essence it is a form of viral marketing.

The data silos are the result of business silos. For instance, customer acquisition and retention processes and organizations are still separate functions in most firms. As such, the customer lifecycle is not owned end-to-end by any one group in the organization. A second example is the simple split of customers between various billing platforms that provide further splits of customer information and prevent a 360 degree view of all clients due to operational limits.

The best solutions to fixing these continuing "ills" is first: provide a platform to integrate all important information in one place and share it effectively. Second, reorganize the classic 'sales vs. retention' organizations and metrics into one customer organization with metrics that reward the correct behavior: namely acquiring and holding onto profitable customers. Tools need to be provided to represent the information to the front end channels. Analysis not put to work where it is needed is like the proverbial tree falling in the forest: who cares!



## Oracle ([News - Alert](#)) ([www.oracle.com](http://www.oracle.com))

Ed Margulies, Oracle Product Management, CRM Service Products

The biggest challenge is not in collecting the data, but being sure that the data is used effectively. For example, too many contact centers concentrate more on collecting all the contact data, but ignoring preference data. The successful contact centers are the ones who attempt to build an affinity with their customers. That is, knowing things like what time to call or if an e-mail is preferred instead of a call. Customers also tend to be more loyal if you are proactive in contacting them about a special, or information, that is important to them specifically. All too often, companies rely on a 'publication' model rather than a personalized 'push' model that anticipates each customer's needs. This is why understanding business intelligence and making it a part of your campaign strategy is crucial to foster a sense of loyalty and community with your customers.

Privacy laws and other regulations are acting as a catalyst for the enterprise to be more sensitive to the individual preferences and needs of customers. This is a case where legislation may in fact be the mother of invention. There have been more innovations in data mining, analytics and general business intelligence directly because of privacy laws. There is more diligence in list acquisition and sources are being scrutinized more than in the past. List scrubbing now include delta matches with do-not-call-lists and other opt-out data.

The use of multiple channels i.e. the 'democratization of media types' has had a profound effect on our view of customer data. For example, we are more sensitive to not only how to contact people--based on their media preferences-- but also when to contact them, and when' can mean a certain time of day or mean only at the time when a specific event occurs. Social networking applications are rich in information that can be combined with other data to provide a comprehensive view of customers. For

example, a mash-up page for customer contact may include their Facebook ([News - Alert](#)) updates, local whether, or even presence information. The intersection between CRM, contact center and social networking is a very exciting one - and one that Oracle is beginning to exploit in our planning.

Part of Oracle's heritage is its ability to apply technology to tearing down so-called silos. That's part of what Application Integration Architecture or AIA is all about. The idea is to orchestrate user-centric business processes across enterprise applications. The benefits to integrating across applications are first, you can enjoy business and IT efficiencies in consolidating best practices and data stores; second - being able to react quicker based on orchestrated data means a competitive edge; and third you can accelerate innovation because instead of running interference between disparate data stores, you have more time to solve bigger problems.

## SugarCRM ([News - Alert](#)) ([www.sugarcrm.com](http://www.sugarcrm.com))

Martin Schneider, Director, Product Marketing, SugarCRM

Data quality is a perennial issue. Many times we have individuals entering data that have no incentive to insure quality of that data. Also, many times companies push data entry out to the customer, such as with web forms. Sometimes this can help, as it allows less data entry to be done at the point of issue in the contact center but if the customer has no incentive to get their data correct, that data is pretty useless after the initial point of contact.

We have seen government mandates force organizations to be very careful with their data and how they use it in contact centers. Just because you may have some great data around customer activity doesn't necessarily mean you can act on it. Fortunately, most data generated from a contact center is based on a customer-triggered interaction, which allows organizations to utilize that data to market back to the customer. But companies have to be careful of privacy issues.

Dear CIS Readers,

This column was created for YOU so that you would have an expert source for all of your Unified Communications questions.

Dear Andrea,

*I am trying to find an efficient way to deliver customer information more quickly to my Support Agents. I've heard that most middleware plug-ins do not work. At a recent tradeshow, there was a session on Screenpops. Can you give me your take on them?*

*Signed,*

*Speedy Gonzalez, PA*

Dear Speedy,

**Screenpops are time savers!** Your agents will save little bits of time on each call and those little bits of time add up to BIG savings!

- Customers get quicker, more knowledgeable service
- Staff can swiftly resolve issues with account details on hand
- Reactive time spent on the phone is reduced
- Space is created for proactive initiatives

Let's look at a 20-seat contact center receiving 2,500 calls per day. Screenpops reduce each call on average by 15 seconds. Time savings per day, per agent is 30 minutes. Total time savings across all agents is 10 hours per day! That's the salary cost of 1.25 FTEs, and at an average annual salary of \$40,000, **the total annual savings are \$50,000!!**

And yes, it is important to be sure that the middleware application you choose is compatible and has a history of working with your CRM. I can tell you that Zeacom Screenpops work seamlessly with over 18 of the major CRMs on the market today.

Do you have a question for Andrea?  
Email [marcom@zeacom.com](mailto:marcom@zeacom.com)



*Andrea Kerr is a Solutions Engineer at Zeacom. For 8 years, she has visited customers across the country and deployed a wide variety of unified contact center applications.*

  
**zeacom**  
communications center

800-513-9002  
[usales@zeacom.com](mailto:usales@zeacom.com)



The quality of data due to privacy issues is not all that affected: if you have a multi-channel approach to CRM. A full CRM suite allows you to collect data from customers at many touch points – such as through registering for warranties online, or signing up for loyalty programs or other value-add offers after a sale. If these data sets are all in one place, organizations can easily create a holistic view of their customers, even if they are limited in terms of what data they can collect in other areas. The key is to load the contact center agent with all the available data a customer supplies willingly via other channels.

Companies in the B2C world are starting to become a little more proactive in terms of owning their own customer lists and using more creative methods of attracting interest in their bands. The Web has been a huge factor by allowing a company to reach out in a dialogue via blogs and consumer forums, allowing them to reach people and create communities and learn about who their customers are while extending the brand identity.

If done correctly, this proliferation of channels presents more opportunity to understand customers, and accumulate a more holistic view of them. If you are confident that your multi-channel strategy is working, you can ask for little information about each customer at every touch point, so the experience is non-invasive and highly adopted by them. Putting all of these data sets together, organizations can paint a vivid picture of their customers' tastes and preferences. Also, reporting on which channels seem the most popular can instruct marketers and support leads on the best way to interact with customers going forward.

The data silos tend to exist not because of technology decisions, but due to business decisions. After the most recent tech bust in 2001, many companies eschewed large or sweeping technology purchases and instead focused on "quick wins" and tactical moves. While these insured people kept their jobs and didn't make more the huge CRM failures that have become the stuff of legend, they made for a very disparate data model inside many a company.

## Information Solutions

Information solutions firms have been developing applications and services that deliver and analyze rich and accurate customer data. These products and offerings can make the difference between customers answering the phone and saying 'yes', and throwing away offers, saying 'no' or 'put me on your Do Not Contact list'.

Here is a brief sample of some of the newest information solutions on the market:

AccuData Integrated Marketing's ([www.accudata.com](http://www.accudata.com)) AccuLeads Smart Selects™ provides a simplified alternative to standard consumer list demographics selects. Each Smart Select focuses on a pre-determined audience providing instant access to popular and powerful consumer segments including Boomers, Affluents and GenNext. Each select automatically identifies key demographics like age, income, and date of birth.

Axciom's ([www.axciom.com](http://www.axciom.com)) Person-icX® VisionScape™ segment analysis and visualization tool suite. VisionScape accesses a comprehensive library of consumer behaviors and attitudes using syndicated resources such as Mediamark Research and Intelligence, Scarborough Research, and DK Shifflet and Associates to derive in-depth consumer insights. Other information in Vision-

Scape includes InfoBase-X™ demographic data, consumer purchasing behavior, and business summary data.

CellForce ([www.cellforce.com](http://www.cellforce.com)) offers what it says is the largest selection of opt-in and qualified consumer cellphone numbers and e-mail addresses, with 100 million cell phone user and 150 million e-mail Do Not Call and CAN-SPAM respectively-scrubbed databases. CellForce can reach out to these potential buyers with mobile SMS/e-mail advertising campaigns. Its methodology assists with making outreach programs successful, including minimizing costly (to both marketers and recipients) misdirected messages, by reasonably ensuring that these numbers and addresses are valid.

Intellidyn™'s ([www.intellidyn.com](http://www.intellidyn.com)) I-Distinct, 1-to-1 marketing service that leverages in-depth knowledge about a person's demographics, attitudinal, behavioral and lifestyle choices to develop truly personalized marketing campaigns that yield higher response rates, increased sales and improved customer retention and loyalty. I-Distinct profiles customers or models prospects by extracting information about them from Intellidyn's data sources, then clusters them based on lifestyle habits to identify

their individual 'marketing DNA'. Personalized messages are created, launched by individualized marketing campaigns.

TARGUSinfo's ([www.targusinfo.com](http://www.targusinfo.com)) ElementOneSM analytics platform performs sophisticated, relevant and actionable customer analytics. It applies the resulting intelligence not only to existing customers but also to new prospects, even in the split second before an agent answers a call or content is served on a Web page. ElementOne builds upon On-Demand IdentificationSM services and their ability to provide contact centers, marketers, risk managers and Caller ID systems with verified name and postal address for any phone number, in subsecond time.

Trillium Software ([www.trilliumsoftware.com](http://www.trilliumsoftware.com)), a unit of Harte-Hanks ([www.hartehanks.com](http://www.hartehanks.com)), Trillium Software® System version 11.5 offers an expanded, fully-integrated set of data profiling, validation and cleansing capabilities across a broader range of countries. The version provides for example wider coverage of street and house-level validation in fifteen additional countries such as Austria, Poland, Russia, and New Zealand. This helps firms obtain accurate results for global data, incorporating country-specific rules, standards and cultural nuances.



With more inexpensive, yet full service CRM options available, organizations of all sizes are starting to realize the benefit of having all of their data in one system. It is a slow process, but I think we will begin to see these silos disappear in a few years as more and more companies standardize on one main system of record for customer data.

#### **Teradata (News - Alert) ([www.teradata.com](http://www.teradata.com))**

David Schrader, Director of Marketing

The biggest issue for most companies is getting the customer data in one place which provides faster access to up-to-date and high quality information and decreases costs. For example, purchased information can benefit everyone in the company, not be squirreled away in one division's systems. Having only one database of customer information significantly decreases the cost infrastructure: in licenses, but more importantly in maintenance and data copying costs. Unfortunately, many contact centers have their own silos of data within their operations. That means they can't get to an end-end view of the customers even within that channel, much less take advantage of the cross-channel, total customer experience analytics. Where customers shop in a store, then call the care centers, go online and shop, then call the care centers. Most companies are far from the vaunted 360 degree view of the customer.

DNC (Do Not Call) had a big impact which drove many companies to focus on better inbound customer call handling. Being ready with the 'next best offer' when customers call you is terribly important, but that requires insights on purchase patterns and service patterns. Tagging information and managing it requires good data governance programs, as well as periodic audit and information security practices. While these are "new" for contact centers, they are old hat to the database administrators (DBAs) and managers. What's needed is more interaction between the contact center owners and senior executives and the DBAs within the marketing organizations in most companies.

The new channels e.g. SMS/social networking is overhyped. Additional communications channels such as SMS will be the first to take advantage of the newer capabilities, but there is a limit to how much information people are willing to put up with or pay for. Social network analytics are on the horizon, and there appear to be two areas of shorter term significance: reputation analytics (what are people saying about you) and communication networking analytics (to whom, including influencer analytics). So in one sense, the social networks will provide new data append capabilities on the communication patterns, but their ability to do that will butt up against privacy concerns by most consumers.

Breaking down the silos boils down to people, process, and technology, and the people issues are profound. Until the care center group and the marketing group have regular face to face meetings, nothing will change. Until the CEO mandates by-the-metrics-oriented end-end customer experience KPIs, nothing will change. Technologically, it's about getting all the customer information in one place and being able to transform raw data into insights and useful information for the front-line - like customer valuations, likelihood to buy, at what price (if variable pricing can be done), and product sequencing analysis. The list goes on and on, but it means contact centers have to be contributing players to some new thinking: that they need a 'change agent', a 'risk taker': someone who can destroy the inertia.

### **Warehousing Data For Realtime Access**

Just as firms carefully warehouse goods for order fulfillment organizations should do likewise with customer data, in data warehouses.

Data warehouses provide, according to Wikipedia a common data model for all data of interest regardless of source. This makes it easier to report and analyze information than it would be if multiple data models were used to pull information.

Data warehouses have, like product warehouses, evolved from storing items for when firms need them to just-in-time delivery where the information is in and out quickly, known in this instance as active warehousing.

David Schrader, director of marketing, Teradata, which makes data warehousing solutions, explains that contact centers can use active data warehousing in two ways: to react to customers who make inbound calls and to proactively communicate with them.

In inbound applications agents can access specific details about interactions in the data warehouses and use this information to resolve issues and/or to cross-sell or upsell. For outbound, events such as dropped-call records flowing into the warehouses can automatically trigger apology calls, with some kind of compensation for customers.

"In the past, data warehouses handled mostly strategic applications, which did not require instant response time or tight integration with operational systems such as the Web or contact centers," explains Schrader. "Today's information can be used through active data warehousing to drive realtime customer interactions over all customer channels."





# ITEXPO West 2008 Review

**I**TEXPO West 2008 has proven to be one of the most exciting, worthwhile, and informative conferences and events for contact centers. Feedback received from attendees, speakers, and exhibitors alike cited the overviews, analysis, inspiration, and insight from the keynote and strong educational content in the sessions. There is a growing range of innovative new solutions launched and in the works that are aimed at making organizations more effective.



## Best of Call Center 2.0

Call Center 2.0 is the portion of ITEXPO ([News](#) - [Alert](#)) West designed to address the needs of contact center leaders as they transition to IP telephony based-call systems with both education and with products and services offered by exhibitors.

Here are the exhibiting firms that our editorial experts determined represent the Best of Call Center 2.0.

**Growth can occur from selling more to existing customers by carefully analyzing all information sources such as details in calls to resolve hidden issues and to seek new needs that one's products or services can meet.**

***Paul King  
President and COO, Aperio CI***

- **CosmoCom** ([News](#) - [Alert](#))

CosmoCom [www.cosmocom.com](http://www.cosmocom.com) is the global leader in Contact Center Consolidation 2.0, an all-IP contact center strategy that helps companies to be more reachable and more responsive in a cost effective way. It encompasses multiple locations including onshore, offshore, and home; formal and informal agents; captive and outsourced operations; multi-channel communication; and multiple applications. CosmoCom technology enabling Consolidation 2.0 is available as a premise-based solution and as a service from top global service providers hosting it.

- **Syntellect** ([News](#) - [Alert](#))

Syntellect [www.syntellect.com](http://www.syntellect.com) is a premier provider of enterprise-class contact center solutions for the high-technology,

financial services, help desk, utilities, government, and consumer products industries. It helps its customers create, maintain and continuously improve superior end-to-end service for their customers: personalized service that values their preferences from the way they contact a business, to the level of help desired.

- **Vocalcom**

Vocalcom [www.vocalcom.com](http://www.vocalcom.com) has provided world-class contact center solutions for the past 10 years. Within its product portfolio list there is the latest ACD, IVR, predictive dialing, hosted solutions, call recording, CTI, scripting, screen pop, speech engine, VoIP/HMP engines, reporting, supervision, and e-mail management. Vocalcom's Hermes.Net integrated full-featured multichannel contact center solution addresses all industry sectors that directly target customer interactions including sales, marketing, collections, customer service, and telemarketing.

## Individual Insights

Here is a selection of some of the insights gained from individuals met and engaged in discussions with at the conference:

– Paul King, President and COO, Aperio CI ([News](#) - [Alert](#)) said there is a growing realization by firms that they need more than ever to retain and secondarily to cross-sell and upsell to existing customers rather than seeking new customers (more about this point in this issue's Logout).

Growth can occur from selling more to existing customers by carefully analyzing all information sources such as details in calls to resolve hidden issues and to seek new needs that one's products or services can meet. Growth can also happen by personalizing offers through understanding how each customer actually uses the phone and services.

– Lawrence Byrd, Director, Communications-Enabled Business Processes, Avaya ([News](#) - [Alert](#)) said that enterprises need to adjust their viewpoints from unified communications to unified organization, of serving the



customer regardless where they are in the enterprise. He sees branches integrating desktop presence, potentially using IBM ([News - Alert](#)) or Microsoft desktop interfaces. This branch/contact-center integration has been especially important for organizations with small local office locations, such as in insurance, that want a consistent brand image to be presented no matter where a customer calls for assistance.

Increasingly companies must go to where the customers are and deliver service right there. That includes social networking and virtual community site such as Second Life and Facebook, because that is where customers often find out information on products and services.

– Francis Carden, Founder and Chief Evangelist, Open-Span ([News - Alert](#)), pointed out that why should organizations toss out existing applications and buy and install new ones at considerable cost when they do not have to? His firm's application integration product lengthens the lifespan and functionality of older legacy software while saving money compared with buying and installing new systems by enabling virtually any program that runs in Windows

– A discussion following a session on 'Enabling Home-Based Agents' given by Mark Moore, Chief Technology Officer, TeleDirect ([News - Alert](#)), revealed a new issue: how to manage other data users in the home i.e. family members, friends, and guests from draining too much from the pipe when home agents are working.

Yet upon reflection afterward the answer may be as simple as buying extra capacity or two lines: one for business, the other for personal/home. Yes, this adds to the costs of working from home, but compared to the expense and hassle of commuting, with the dividend of maintaining domestic peace, the greater outlay is well worth it.

– Brian Spencer, president of OAISYS ([News - Alert](#)) made a very good point in his presentation on 'Making Your Contact Center Smarter: Best Practices' in that you don't have to be live with customers to give excellent customer service. That it is OK to look

into matters and them, and in doing so reviewing call recordings to make sure that every issue customers raised and the importance they have given to them by language and tone of voice

are followed up on.

In an ideal world when we reach a contact center agent that individual should meet our needs. Yet that is not realistic. If



given the choice of continued escalations and on-holds versus callbacks from individuals who can truly help us, which one would most of us pick?

– Is Belize the next contact center location? Two attendees from that unique Central American country think so, and for good reason.

Belize is bilingual English/Spanish thanks to having been a British colony, formerly named British Honduras, and is nestled next to Mexico and Guatemala. It has over 300,000 residents and a customer service culture thanks to a thriving eco-tourism sector, and high labor availability, plus a budding offshore financial sector. Belize City, the largest municipality, is home to roughly 20 percent of the population.

Belize may need an upgraded voice/data communications network. Yet as with many other parts of the world, including in Central America and the adjacent Caribbean region, the resources to enable it may come once a business case, such as to attract contract centers, has been made.

### New Products/Services

There were several new products, services aimed at, and can be used by contact centers announced and released at ITEXPO West. Among the firms and solutions are:

**Voxbone (inbound IP-based carrier) [www.voxbone.com](http://www.voxbone.com)**

Voxbone now has licenses to operate in all 27 European countries. This enables contact centers to cost-effectively route calls to agents with specific language skills including those home-based, subject matter experts, informal centers





without contracting with individual telcos. Buying Voxbone's services is scalable, which affordably permits connecting callers who prefer to speak uncommon languages, such as Finnish, to those agents who are fluent in them.

**Zeacom (Unified Communications)** [www.zeacom.com](http://www.zeacom.com)



Zeacom acquired Mi-Audio and Mi-Eval from New Zealand-based Talking Computers which will give Zeacom (News - Alert) Communications Center 5.1 call recording/voice logging, quality monitoring, and coaching and training capabilities.

Zeacom also showcased its Executive Mobile module, which gives managers and professionals the freedom to manage their presence and availability status on their BlackBerry (News - Alert) and Windows Mobile devices. With it a general manager attending ITEXPO could be reached and respond to a service level issue with instructions to supervisors.

**Zehu (Speaker Authentication)** [www.zehu.com](http://www.zehu.com)

Zehu's Zehu Authenticator 3.0, its new white label voice-based biometric authentication solution, provides an ideal tool for time-and-attendance at contact centers. It can also authenticate the identities of home agents: essential because these individuals are working sight unseen. This tool provides an important layer of security to critical and sensitive applications such as financial services and healthcare. Zehu's solution uses voice templates that mathematically represent voice features but do not contain actual voice samples. These techniques should address the security concerns raised about the ability of others to gain access by mimicking speakers.

### Future Products

Several firms gave heads-up on new releases that are in the works, some may have been released by the time these words are read. They include:

**Aperio CI** [www.aperioci.com](http://www.aperioci.com)

Aperio CI will have a new product aimed at tapping social networks. SNAP (Social Networks Analysis & Propensities) is a revolutionary use of data analytics that identifies social networks within a mobile operator's customer base. It will be released later in 2008. SNAP will allow firms to better understand the dynamics that exist among its users, enabling them to sell new services and products, provide a higher degree of service, and increase customer retention.

**Envision Telephony** [www.envisiontelephony.com](http://www.envisiontelephony.com)

Envision Telephony is putting the final touches on a new speech analytics solution that will offer lower-cost, high ROI fundamental functionality for enterprises. The new application, which is programmed to launch in January 2009, will have critical features such as word and phrase spotting for critical terms such as 'cancel' but will not have some of the complex, expensive and often underutilized tools such as emotion detection.

The strategy for the product, which will cost significantly less than full-featured similar solutions is to remove the typical barriers of entry to the benefits of speech analytics for both enterprise and mid-market companies, explains marketing director Jim Shulkin.

**Fonolo** [www.fonolo.com](http://www.fonolo.com)

Fonolo is a new firm that is beta testing a new web-based fast deep-dialing solution, akin to website bookmarking, which will enable callers to directly reach exactly who they need to contact on repeat calls without digging through and being stopped at each layer in an organization. The solution, expected to be on the market in early 2009, will remember numbers dialed before to the same individuals. It can also record calls: a great customer service feature that enables customers, not just contact centers, to recall what was said in the interactions.

Fonolo will also release about the same time an automated customer satisfaction solution. As soon as a consumer hangs up a dialogue box appears, allowing them provide feedback via text.

**OAISYS** [www.oaisys.com](http://www.oaisys.com)

OAISYS is expecting to release an integrated live call monitoring solution for Tracer by year end that will permit easier access to recordings, and have and enable saved filters. It will also have more flexible live call auto-monitoring, integrated live coaching that will enable the creation of text-based annotations, live call evaluations and live call commenting using instant messaging.

OAISYS also plans to launch an automated e-mail solution in first quarter 2009. The tool, to be featured in both the Talkument and Tracer applications, will permit users to select if they want new voice documents delivered to their e-mail accounts.

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## News Analysis: Contact Centers Unprepared For Disasters, Disruptions

**A** new and disturbing study by DMG Consulting “Business as Usual? A Benchmarking Study of Disaster Recovery and Business Continuity for Contact Centers” sponsored by Empirix, reveals that contact centers are ill-prepared for disasters and for equipment failures, while preventing or minimizing them could save millions of dollars in lost revenue.



Yet a new and disturbing study by DMG Consulting “Business as Usual? A Benchmarking Study of Disaster Recovery and Business Continuity for Contact Centers” sponsored by Empirix ([News - Alert](#)), reveals unfortunately otherwise. The report documents contact centers’ readiness to adapt to disruptions caused by internal system and process changes and benchmarks how contact centers handle disaster recovery/business continuity strategies, plans, and testing. Here are the highlights:

- Less than 37 percent of companies are confident that their operations can withstand a disaster or business disruption
- 60.2 percent of firms are not routinely testing their core contact center infrastructure. This leaves them open to unexpected but avoidable failures
- Only 4.7 percent of firms test their disaster recovery/business continuity (DR/BC) plans monthly, leaving 95.3 percent at risk of a serious meltdown in an emergency situation
- 20 percent of contact centers do not even have a disaster recovery plan

The most common DR/BC approach, used by nearly 31 percent of survey participants, was to conduct business as usual at a less ambitious service level agreement (SLA) levels. The most common tactic to achieve this goal, selected by 40 percent, was to failover to a remote site. Meanwhile 18 percent prioritize sales and customer service transactions, but hold off on handling other types of transactions while just over 25 percent provide only basic coverage for calls.

“Unfortunately, the majority of companies surveyed have not made adequate investments to prevent disruptions to their mission critical service infrastructure,” states Donna Fluss, president of DMG Consulting. “They run the risk of alienating customers in their time of need.”

“It seems surprising that companies would have an evacuation plan in place, but not one that details how to keep business operations running smoothly should a disaster occur,” says Phil Odence, vice president of business development at Empirix. “We appreciate the honesty of all the survey participants and hope that this got them thinking about the importance of testing and monitoring the technology that supports their disaster recovery plans.”

Testing is key to disaster response and for operational continuity, said the report. Because contact centers use as many as 40 or 50 different systems and applications to service customers, it is essential to test every system and potential point of failure to proactively identify and resolve system issues before they can impact customers. One of the vital applications to keep operational is the ACD: if a customer interaction cannot reach the ACD, it cannot be handled by the organization.

DMG benchmarks the survey responses and defines a “leaders” category. Leading companies have well-defined disaster and contingency plans and test them on a frequent basis. They also monitor and test their core and supporting systems routinely to avoid unnecessary service disruptions. Leaders are prepared to mitigate the effects of both unavoidable disasters and system and process failures that can threaten service level agreements and the customer experience.

This study provides best practices and recommendations to help contact centers enhance their disaster recovery and business continuity plans.

Here is a sample:

- Contact centers of all sizes must have a disaster recovery and business continuity plan and test them monthly
- Design the plan to keep contact center activities operational but at lower SLAs during the duration of the incident
- Develop a cost effective back-up design using a combination of network routing, automated failover, remote locations, hosted contact center infrastructure and outsourcers
- Use automation to test mission-critical systems, processes and workflows daily. Test non-mission-critical systems, processes, workflows and all of their integrations monthly
- Build in sufficient time to thoroughly test any changes to systems, processes and workflows
- Involve both IT and contact center business managers in planning, testing and approving test results

*To obtain a complimentary copy of this report and learn how to prepare your contact center for the unexpected, visit [www.empirix.com/drsurvey](http://www.empirix.com/drsurvey).*



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# Enabling Excellence With IP Recording

**I**P recording is coming into its own as a QA tool, with what users report are high quality and functionality.



As September's contact center recording article pointed out, IP applications have lower costs and can more easily support value-added solutions. Their suppliers have also incorporated features that may not be present in older legacy TDM software, such as agent self-monitoring and screen capture. Going to an IP environment, whether conversion or new installs which has driven IP recording, has also allowed contact centers to benefit from these new tools.

While there have been in a few instances some bugs to be worked out with IP recording, which there is with any new technology, its features, benefits and the functionality, along with the strong support of the suppliers have outweighed them. Here is a just a few of the many successful experiences contact centers have had in employing IP recording solutions:

## **Stark Area Regional Transit Authority's Multi-Channel Solution**

Call recordings can capture more than just contact center customer service, support, and sales. They are extremely valuable tools to obtain, for further review and action, interactions with other departments and not just by phone either.

The Stark Area Regional Transit Authority (SARTA), which serves the Canton, Ohio area, offers an excellent example. SARTA has four small networked contact centers. Three handle customer service inquiries with one agent each per shift and are located at regional transit centers. The other books rides and provides customer care for SARTA's ProLine paratransit service with three agents per shift, and is situated at the agency's head office. There are two separate ACD queues for the general customer service and for ProLine.

SARTA records these calls as well as for the bus dispatch center, its head office, on a wireless conference call phone also used for recording meetings, and for radio transmissions between dispatchers and drivers. Calls and transmissions are recorded to assist with customer service, QA, and with legal compliance. There are approximately 1,500

recorded interactions at SARTA each weekday of which only a minority: 35 percent, are contact center. A large slice: 30 percent are for radio traffic.

To manage complex operations and to keep costs at the publicly-funded agency down, SARTA migrated part of its phone system to IP from TDM in early 2008. It upgraded its switch, a Toshiba Strata CTX 670 PBX ([News - Alert](#)) to IP, which meant that it also required a new and IP-enabled recording solution.

"We needed a system that would record IP, digital, and analog signals, and allow desktop users to listen to calls and transmissions when they were recorded and to evaluate and report on those calls," explains Information Systems Assistant, Jeffrey Heimberger. "Our old technology could not record IP channels nor did it have the desktop review and evaluation functionality that we sought."

Fortunately, SARTA's solution was close at hand. It has had since September, 2005 an OAISYS ([News - Alert](#)) Strata ACD server and software package that was integrated with the Toshiba switch, which avoided having a separate license for phone system integration.

The new Tracer 5 recording software, whose beta version OAISYS had released in late 2007, replicated the phone switch information from the ACD server. Tracer 5 also introduced VOX recording for radio channels. Because the new Tracer software would give it the radio recording capability SARTA needed, the agency agreed to deploy the beta application.

The beta Tracer 5 took one week to deploy. Initial installation was easy compared with the old solution, reports Heimberger, thanks to Tracer 5 being written for Microsoft .NET ([News - Alert](#)). CCI's professionals clicked on OAISYS's site and downloaded the applications. The old voice recording application required loading CDs at each workstation.

SARTA has been pleased with the Tracer 5 recording quality and with the added granular security whereby Heimberger



gives users logins so that they can only listen to a specific extension, and nothing else.

There have been issues with making the recording and the IP solution work. For example the phone usage reporting capability available through Tracer 5 did not function with the first installation. This matter and others were resolved through software upgrades and the final release.

"We're very happy with Tracer 5 now that the issues have been worked out," says Heimberger. "It has enabled us to improve our customer service and quality by permitting staff to self-monitor and improve their performance. The contact center agents can share calls with managers in the interface. Managers can also monitor and share a portion of those calls with the agents, showing them 'here's how it sounds and here's how it can be done differently, and better.'"

### **Evergreen Ends 'He Says/She Says' With Recordings**

Collections, also known as accounts receivable management (ARM) ([News - Alert](#)) is one of the most critical applications there is for call recording. Capturing these calls is a vital method to provide proof that debtors have promised to pay bills.

Evergreen Professional Recoveries, based in Bothell, Wash., offers ARM services for government, medical, retail and financial institutions, as well as legal services. It also handles outsourced medical billing, online check verification, credit risk evaluation and pre-collect notices. The firm has a 70 seat contact center co-located with its head office.

Evergreen had been selectively recording calls: up two or three calls per agent per day using a Web-based auto-dialer. Yet not all of the contact center's seats are connected to the solution, which meant that only 25 percent of the agents' interactions could be recorded. Unfortunately, the lack of call recording created gaps in agent training, compliance, and left the company vulnerable to sticky situations.

"We had no recourse when lawyers were calling with claims," reports Ken Ross, CEO of Evergreen Professional Recoveries. "It became a 'he said, she said' situation, where there was no hard evidence to base a decision or dispute on."

Also, while Evergreen implemented calling scripts, policies and procedures for staff to follow while completing calls, agent compliance was only about 75 percent. Training on the procedures was completed by managers during side-by-side monitoring and other educational sessions, but live calls were not always accessible for monitoring. Scheduling live sessions with 70 people was unwieldy with only two to three managers available for daily call monitoring.

Evergreen decided to find an always-available call recording solution. Upon the recommendation of its telephony consultant and reseller, it chose to implement an IP-based application that would permit 100 percent call recording without completely overhauling their phone system. Evergreen uses IP in its office.

Evergreen's IT team worked with an independent consultant and a telephony reseller to source and implement CallRex Professional™ from Telrex ([News - Alert](#)). The system went live March 2008.

CallRex utilizes packet-sniffing technology to identify and record IP traffic on the network. When calls are initiated or received, it begins to record the associated packets and enables real-time monitoring of the calls. Multiple search criteria enable users to quickly find the call or calls needed. Call recordings can be played back or exported and e-mailed as standard WAV files.

"I've meant to implement call recording technology for years," explains Ross. "But I thought that the solutions were going to be too expensive for our mid-sized contact center. Instead we've found it to be affordable, provide value for money, and very easy to use. The software has proven to be a turnkey solution for us."

With CallRex, managers can now set aside time to monitor calls and provide feedback to agents. Agent compliance is now above 90 percent as a result of the coaching sessions and call recording.

The ability to quickly search for recordings has proven to be a lucrative feature. Now, when potential litigation issues arise, managers can find and export them such as through e-mail.

That last feature has saved tens of thousands of dollars for Evergreen, as the calls can be used to clear up situations before issues go to litigation.

"Call recording has headed off at least two frivolous lawsuits in the past three months, which would have cost us at least \$10,000 in fees," says Ross. "CallRex has therefore more than paid for itself."

### **Denver Newspaper Agency's Transition To IP**

Switching to or starting out from scratch on IP in contact centers can pose challenges in recording as well as routing.

The call quality has come a long ways but it is still not as pristine as TDM. On occasion packets do get lost or arrive in the wrong order, and calls do drop out. Yet as with any new and fundamentally sound technology, such issues can be or are in the process of being worked out.

The Denver Newspaper Agency publishes The Denver Post and Rocky Mountain News under a joint operating agreement designed to preserve editorial competition while managing costs.

'The Agency' as it is known, which is equally owned by MediaNews and The E. W. Scripps Co, handles classified and display advertising, deliveries, and subscriptions as well as printing and distribution for both newspapers.

In late 2005 The Agency opened a new primary contact center in the Denver Tech Center with 100 seats. The new facility also



supports an 80 seat contact center in the Agency's headquarters.

When the new center opened The Agency decided to upgrade its call recording solution that would serve all of its sites. It then selected Telstrat's ([News](#) - [Alert](#)) Call Parrot (now Engage). Then, in summer 2006 The Agency opened a new headquarters. With the move it switched from TDM/PSTN to IP.

"The existing recording tool was PC-based rather than server based, making it less versatile and had become too cumbersome to maintain, and it could not record all inbound and outbound calls," explains Tim Myers, Assistant Manager - Telecom. "Telstrat had all the features we wanted and it was compatible with our Nortel CS1000 switch. It could also record both TDM and IP, which avoided replacing the entire phone system."

The Agency initially installed Nortel ([News](#) - [Alert](#)) TDM workstation phone sets at the contact center, which were hooked into the Telstrat server as it did not wish to cut its teeth on IP in a revenue center. The install took less than a week, including training.

The opening of the new center with TDM went smoothly. Telstrat's TALC card allowed The Agency to record everything from any TDM phone in the contact center. When the site was ready to migrate to IP, in spring 2007, it upgraded Telstrat server.

Several issues soon arose following the IP conversion. Calls were randomly not being recorded but these were related with the network and IP telephony equipment rather than with the Telstrat solution. Also, unlike TDM, the Agency can only record two keys on a Nortel IP set, which meant that monitoring phone sets with multiple dial-out numbers is difficult, though the issue has not proven to be critical. Telstrat and Nortel continue to work together to resolve both matters.

"Even with these challenges the results have overall been very positive," says Myers. "Telstrat is easy to use for our supervisors and provides them with an excellent coaching/monitoring tool. We are capturing more recordings than before and as such have been able to improve quality and service to our readers and advertising customers."

**The following companies participated in the preparation of this article:**

**Altitude Software**  
[www.altitude.com](http://www.altitude.com)

**OAISYS**  
[www.oaisys.com](http://www.oaisys.com)

**SpectorSoft**  
[www.spectorsoft.com](http://www.spectorsoft.com)

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

**Telstrat**  
[www.telstrat.com](http://www.telstrat.com)

## Supplementing IP Recording With Screen Captures

IP recordings are one part of the quality monitoring and assurance package. The other is capturing activity on agents' screens for performance evaluation and review, and for examination in response to and aiding in the resolution of customer service issues.

Televation is a teleservices firm located in Sudbury, Ontario, Canada that provides markets such as communications and software with service and support for Canadian and US clients. It has in production 25 seats with the potential to expand that to 75 seats.

Televation, which is an IP shop, has been successfully using Altitude Software's Altitude UCI 7.5 but needed a system that would compliment the recording application with the capture of computer information. It also wanted to lower average handle time (AHT), enhance quality, and boost overall performance.

The firm selected SpectorSoft's Spector 360 as its President and CEO, John Wickie, had used SpectorSoft's products very successfully as a monitoring solution at another contact center that he had managed prior to forming Televation.

Spector 360 provides Televation the ability to record e-mail/webmail, chats, keystrokes, website activity and most importantly, the capture of screen information that would work hand-in-hand with their existing call recording equipment.

"We needed a tool that would complement the voice recordings from a screen snapshot perspective so that we could get the complete picture as to what the agent was saying, and doing," explains Wickie. "It was only after we delved deeper that we realized just how great the potential was to employ SpectorSoft within the contact center as a performance enhancement tool by capturing and enabling easy access to screen activities."

Televation installed Spector 360 in early 2008. The implementation went extremely smoothly. The software proved friendly both to the IT team who put it in and integrated the application with the voice recording and Cisco routing solutions and to the supervisors who use the tool. The software also enabled Televation to keep their existing system in place rather than go through an expensive retooling.

"The results we've seen from the SpectorSoft application have far surpassed our expectations," reports Wickie. "We've seen a 12 percent improvement in AHT and a 10 percent improvement in quality assurance scores. We're now using these elevated performance levels as our benchmarks for future campaigns for our clients, thereby helping them enhance their customer relationships."





## Call Center Software Online Community

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## Stopping ID Theft By Raising “Red Flags”

**B**eginning this month contact centers including teleservices firms that handle consumer financial information are required by Federal law have formal written plans to identify, detect, and respond to patterns, practices, or specific activities that could indicate ID theft.

The Federal Trade Commission ([News - Alert](#)) (FTC), federal bank regulatory agencies, and the National Credit Union Administration (NCUA) mandate formal written and current ID theft prevention programs (ITPPs). Firms must have their senior executives sign off on ITPPs and educate and train their staff on complying with them.

These regulations are known as the ‘Red Flags’ rules, technically sections 114 and 315 of the federal Fair and Accurate Credit Transactions (FACT) Act of 2003. They apply to banks, credit card issuers, lenders, government agencies, nonprofits and their outsourcers such as teleservices agencies, that hold consumer and small business credit information, known as ‘covered accounts’.

The Red Flags rules are designed to stanch the losses from ID theft, which, reports the President’s Identity Theft Task Force, costs billions of dollars each year to individuals and businesses. They are also aimed at ending the unaccountable fear, aggravation, and time spent in responding and recovering from such crimes.

Every consumer data touchpoint including contact centers, data processing, and HR must follow Red Flags, and for good reason. Thieves, both outside and inside target these operations to obtain data, such for credit card fraud or to sell to spammers.

“Any function or department that has personal information you have to be careful about and make sure they know about and take steps to comply with Red Flags,” explains Direct Marketing Association Senior Vice President, Government Affairs Jerry Cerasale. “They hold data: from Social Security numbers to mother’s maiden

names, 401(k) information and to bank deposit and health insurance numbers that crooks want to get their hands on.”

The Red Flags regulations also requires credit and debit card issuers to develop policies and procedures to assess the validity of a request for a change of address that is followed closely by a request for an additional or replacement card. These too, could be warnings of ID theft.

“With the prevalence of ID theft, you can no longer just accept a change of address,” Cerasale points out. “You have to try and make sure a thief is not trying to steal IDs. The change of address rules in Red Flags adds a critical new and complimentary layer of security to existing protections that have long been implemented by the US Postal Service.”

To help firms design programs to comply with these rules, the FTC, the federal banking agencies, and the NCUA issued guidelines including a supplement that identifies 26 possible red flags (see box).

These red flags are not a checklist, but rather are examples that financial institutions and creditors may want to use as a starting point. They fall into five categories:

- Alerts, notifications, or warnings from a consumer reporting agency;
- Suspicious documents;
- Suspicious personally identifying information, such as a suspicious address;
- Unusual use of – or suspicious activity relating to – a covered account;
- Notices from customers, victims of identity theft, law enforcement

authorities, or other businesses about possible identity theft in connection with covered accounts.

Michele Shuster is senior partner Mac Murray, Cook, Petersen & Shuster LLP, which works with the teleservices industry. She supports the Red Flags rules and believes they are reasonable because they could help prevent the theft from happening. Existing federal and state laws have focused on responding to such crimes such as by requiring consumers to be notified when their data have been accessed by unauthorized individuals, whether deliberately or accidentally.

“I’m glad we’re focusing on the prevention instead of notifying consumers after the fact, which some firms were not doing when required to do so,” says Shuster. “While I am no fan of increased regulations, Red Flags is an exception as it is indeed an ounce of prevention which is worth a pound of cure. We are trying to prevent the victimization of consumers and businesses, which is a very good move forward in privacy laws.”

The DMA’s Cerasale believes Red Flags will force firms to have programs in place to catch security breaches. Even with the best data security theft and breaches will happen.

“The last thing you want is if you have a breach is not to have a plan in how you deal with it,” says Cerasale.

### Making Red Flags Work

To make Red Flags work, Shuster recommends that contact centers develop and implement compliance training programs on the written policies. This way every-





one: contact center director, VP customer service to IT and to supervisors and agents understand the importance of these rules and what steps to live up to them.

"The FTC has said that consumer privacy is their number one priority," says Shuster. "They are taking it very seriously, which means not only must firms have their written ID theft policies in place now, but they should also have their staff trained on them to prevent thefts from happening."

Teleservices companies should consider getting a head start by developing their own Red Flags-compliant ID theft prevention program before they are asked to do so by current or prospective clients. It sends a mes-

sage, she says, that they are aware of clients'/prospects' legal requirements and that it is a priority for them, which would be very comforting for teleservices buyers to receive.

"If I am with a financial institution and I'm using a teleservices company that is included in this law, I would be very impressed with that company if they sent me a copy of their Red-Flags-compliant ITPP," says Shuster. "If I am with a teleservices company I would be requesting a copy of their ITPP as well so that my teams can comply with them."

Cerasale suggests that firms take a hard look at the types of data they keep. The more they hold the greater the risk of

loss of data and the greater the risk of ID theft from that loss.

For example getting ahold of bank deposit information is like a virtual ATM card that enables an instant cleanout of accounts.

Handling this information also consumes a large amount of data storage, and supporting computer processing resources. The less data that needs to be handled the lower the costs.

"If you don't or no longer need the information such as credit card numbers both front and back, get rid of them," recommends Cerasale. "You reduce your ID theft risk and at the same time free up resources that you can better deploy elsewhere."

## ASR, and Patience Keys To Mobile Voice CRM

### Identity Theft Prevention Program (ITPP)-26 Red Flags

1. A fraud alert included with a consumer report
2. Notice of a credit freeze in response to a request for a consumer report
3. A consumer reporting agency providing a notice of address discrepancy
4. Unusual credit activity, such as an increased number of accounts or inquiries
5. Documents provided for identification appearing altered or forged
6. Photograph on ID inconsistent with appearance of customer
7. Information on ID inconsistent with information provided by person opening account
8. Information on ID, such as signature, inconsistent with information on file at financial institution
9. Application appearing forged or altered or destroyed and reassembled
10. Information on ID not matching any address in the consumer report, Social Security number has not been issued or appears on the Social Security Administration's Death Master File, a file of information associated with Social Security numbers of those who are deceased
11. Lack of correlation between Social Security number range and date of birth
12. Personal identifying information associated with known fraud activity
13. Suspicious addresses supplied, such as a mail drop or prison, or phone numbers associated with pagers or answering service
14. Social Security number provided matching that submitted by another person opening an account or other customers
15. An address or phone number matching that supplied by a large number of applicants
16. The person opening the account unable to supply identifying information in response to notification that the application is incomplete
17. Personal information inconsistent with information already on file at financial institution or creditor
18. Person opening account or customer unable to correctly answer challenge questions
19. Shortly after change of address, creditor receiving request for additional users of account
20. Most of available credit used for cash advances, jewelry or electronics, plus customer fails to make first payment
21. Drastic change in payment patterns, use of available credit or spending patterns
22. An account that has been inactive for a lengthy time suddenly exhibiting unusual activity
23. Mail sent to customer repeatedly returned as undeliverable despite ongoing transactions on active account
24. Financial institution or creditor notified that customer is not receiving paper account statements
25. Financial institution or creditor notified of unauthorized charges or transactions on customer's account
26. Financial institution or creditor notified that it has opened a fraudulent account for a person engaged in identity theft

*Source: Federal Trade Commission, supplied courtesy of Michele A. Shuster, Mac Murray, Cook, Petersen & Shuster LLP*



By Joe Fleischer



## Real-Time Data for the Long Term

Why real-time data helps call centers plan ahead rather than react.

Until the middle of this decade, the most visible displays of real-time data in call centers were from readerboards and wallboards that contain light-emitting diodes (LEDs). The types of electronic displays you now find in call centers are far more versatile, and they can present information from more sources, than LED models. Yet despite these advances, call centers primarily track real-time data not to improve their ability to plan

To understand why this is the case, it's instructive to look at how call centers historically collected and presented real-time information. Call centers have long relied on LED displays to disseminate data among agents, like the number of different types of calls that are coming in, and how long, on average, customers wait on hold. Call centers also use LED displays to present messages that inform a group of agents about a situation they all need to know about, such as when too many customers remain on hold for too long.

LED models continue to possess a number of advantages over newer kinds of displays that are now available to call centers. Compared to liquid crystal display (LCD) or plasma monitors, LED models have the widest viewing angles, they last the longest and they are often the least costly.

But as reliable as LED displays are, they have had significant limitations. One limitation used to be that these displays could only gather information from one type of source. When the public Internet and corporate intranets first became ubiquitous, manufacturers and distributors of LED readerboards recognized they no longer had to rely solely on the reporting mechanisms of individual phone switches to enable displays to present information to agents. So they designed LED displays that could receive and convey information across call centers' computer networks.

Eventually, call centers were able to run their most important systems, including call routing, scheduling, interactive voice response (IVR) and call monitoring systems, on computer networks. So electronic display vendors introduced middleware to collect information from these systems. Display vendors also used middleware to show snapshots of some of this information on agents' computers. In this way, call centers could use readerboards to disseminate information, such as average hold times, that encompassed the entire center. At the same time, agents would be able to see information on their computers that specifically applied to them, such as whether they adhered to their schedules.

Now that plasma and LCD displays are affordable to most businesses, call centers no longer restrict themselves to LED readerboards. A call center has the option of showing video feeds, including news and weather that affect its overall business, on the same monitors on which it displays call center statistics. Gathering real-time information from sources besides phone switches allows a call center to understand its performance in a context that extends beyond how much time agents spend on the phone. When a call center uses real-time information as a means to improve performance, it can replicate outcomes it aims to achieve and prevent outcomes it aims to avoid.

For example, during an influx of calls during which a significant number of customers hang up after waiting on hold, it's valuable to find out at what point in time during the influx the center receives more calls than agents can handle. Based on this information, call centers can pinpoint what they need to do to enhance agents' abilities to assist customers.

Perhaps agents need cross-training to answer more types of calls. Perhaps, with the help of your IT team, you can reduce how long it takes agents to look up and update customers' records. Perhaps you can enable agents to receive information that a customer has already provided to your IVR system or to other agents; you can prevent a situation where the customer has to convey the same information multiple times during the same call. In all these scenarios, you discover what resources you need to upgrade your service.

The primary reason call centers gather and view real-time information isn't to react to circumstances as they happen; it's to change their circumstances for the future. Call centers that regularly distill real-time information from a variety of sources are the best equipped to continually improve their communication with customers.

*Joe Fleischer has covered the call center industry for more than 11 years. With Brendan Read, he co-authored the book *The Complete Guide to Customer Support*.*



## Study Shows U.K. Call Centers Performing to Expectations

**C**ustomer satisfaction with their interaction with the call center is essential to overall success of the call center. The main purpose of the center is to provide customer support and if they cannot do that in a way that is satisfying to the customer, the whole organization suffers.

Commissioned by fifty of the U.K.'s leading call centers, new independent research has shown that 93 percent of customers get through to the call center on their first attempt. This study is part of The Top 50 Call Center Initiative, commissioned by Siemens ([News - Alert](#)).

The number of customers reaching the call center on first attempt rose to 98 percent in the retail sector, followed by 95 percent in the financial services and entertainment, leisure and travel sectors. The public sector returned a performance of 87 percent, lagging behind the telecoms and utilities at 90 percent.

Surprisingly, a staggering 96 percent of customer inquiries were resolved by the initial call. The retail sector proved to perform the best in this area, achieving a 98 percent first call resolution rate.

Financial services and telecoms and utilities returned a 97 percent. For the Public Sector, this number fell to 92 percent.

The survey found that it takes on average just 1.3 minutes for customers of the Top 50 Call Centers to get through to speak to an actual person. This figure accounts for time waiting to get through, as well as time spent selecting IVR or touch-tone options, before getting through to a customer service representative.

This study also found that 58 percent of callers got through to a Customer Service Representative in less than one minute. The retail sector performed even better as 74 percent of callers reached the company within 60 seconds. The telecoms and utilities sector was the lowest performing, at 52 percent, just ahead of the entertainment, leisure and travel and public sectors, both at 53 percent.

Apologies tend to be lacking in these call centers, according to this study. For those callers that had to wait more than one minute to get through, only 27 percent received an apology for the delay. Again retail performed the best at 35 percent, and entertainment, leisure and travel returned a 20 percent.

Claudia Hathway, Editor of Call Centre Focus commented in a company statement: "It is great to see so many of the U.K.'s leading call centers get together to find out how they are performing, by asking their customers. That has to be the ultimate test for any call centre. Speed of response has long been the bugbear of U.K. consumers, but this research proves categorically that, in this area, many of the U.K.'s leading call centers are getting it right."

## Contact Centers Realize Benefits in Solutions when Needs are Understood

**C**ontact center managers rely greatly on the performance of their agents to drive the overall performance of the contact center. While disparate solutions have traditionally been in place to drive performance, it wasn't until contact center performance management (CCPM) solutions became available that these managers were able to measure a difference.

Speech analytics have also gotten a great deal of attention as of late as such solutions can offer significant benefits to the contact center, management, staff and even customers. And, while speech analytics and CCPM deliver measurable benefits, it is challenging for many contact center managers to evaluate the solutions and discern one from the other.

Rob Berry, with Enkata, shared his opinions recently that while it is true that speech analytics and CCPM offer many of the same benefits, they each solve different business problems. Plus, there is a difference in the degree and source of the benefits they deliver and the deployment risks of each are significantly different.

Gartner Research, an industry analyst firm for the contact center market, has found that CCPM solutions are used most often when contact center management is seeking to automate the supervision and coaching of an agent, and to improve the overall performance of the organization.

According to a Gartner ([News - Alert](#)) January 2008 report, "These solutions integrate an organization's established contact center technologies, CRM systems, and other data sources to provide a transparent picture of performance through role-specific dashboards and reports, and they drive actions through embedded alerting and workflow capabilities."

For speech analytics tools, they are primary used by quality management (QM) analysts

and, even some contact center supervisors. Such solutions can search for examples of calls that meet specific criteria, including dead time, mention of a competitor or an antagonistic or frustrated tone.

While recording calls can deliver significant benefits within the contact center, few organizations actually record every call. Some industries report that they record as much as 30 percent of their calls, but even that is a generous number.

At the same time, these calls are purged regularly and such activity minimizes the usefulness of speech analytics. Therefore, to be effective, speech analytics must be properly designed to fit the practices of the contact center.



# Hearing The Customers



**T**he images and reality of customers using corded or bulky cordless phones and contact center staff responding on heavy wired headsets, tethered to cubicles are changing.

Today's customers are on the move. Callers are using cell-phones and multimedia smart phones even in their homes, and if they are on residential landlines chances are increasing that those calls are being routed over the Internet.

At the same time more contact center staff are going places, literally. Supervisors and team members are increasingly away from their desks, discussing matters with agents and colleagues face-to-face, participating in meetings and in training sessions, while staying in touch. No more 'off hooks' i.e. taking off the headsets. Those 'centers' are also increasingly in agents' and supervisors' homes.

As well contact center staff want, and need, headsets that provide greater comfort and less strain. Happier agents and supervisors are healthier, more productive, better able to deliver super customer-retaining service, and are more likely to stay.

These new realities pose challenges, however, when buying and using headsets. It is no longer 'one size fits all' i.e. the long-familiar over-the-head unit and wires. Contact centers now need to look at models that have superior audio quality, flexibility, and wearer usability to adapt to and respond effectively to these new and changing environments.

That means must be an even more careful analysis when deciding the cost/benefits of corded versus cordless and which features of either types to select and from which manufacturer in the purchasing decisions. Given that headsets connect agents to the customers, the choice can make a difference in customer interactions, and ultimately relationships.

## Mobile/IP communications...and audio quality

Mobile and landline IP telephony, which are key parts of unified communications (UC), provide increased functionality, convenience, and cost savings. The tradeoff is too often poorer sound quality and sometimes loss of signal. There are also background noise from mobile users, like traffic, loud conversations, and sudden sounds like a truck hitting the brakes that come through with the talkers.

Contact centers should, when installing systems to enable unified communications, buy high quality headsets systems to match, and compensate for deficiencies. The investment in new headsets is comparatively minimal—they usually cost no more than \$250 each—against the sums poured into new contact handling technology.

Headset manufacturers are responding to the UC environments. Plantronics' ([News](#) - [Alert](#)) VistaPlus AP15 digital signal processor-based audio processor improves incoming call quality by using firmware developed originally for hearing aids to improve audio quality. The audio processor also features AudioIQ, a proprietary sound enhancement utilizing digital algorithms to provide unprecedented clarity compared to legacy analog amplifiers and direct connect.

The Jabra ([News](#) - [Alert](#)) headset line, made by GN Netcom, is equipped with GN Netcom's PeakStop(tm) technology that protects users from harmful sound spikes and other loud noises.

"A quality headset is key to a successful unified communications solution," explains Matthew Baker, vice president, marketing, GN Netcom ([News](#) - [Alert](#)) North America. "This component enables users to maximize their technology investment by allowing all products to work together to deliver the best voice quality."

## Cordless challenges

Cordless headsets are slowly taking the place of corded sets in contact centers and for good reason. They allow staff to become more mobile, in the office, offsite, and at home workplaces while enabling them to stay in touch.

Cordless units are also less hassle to use compared with corded models because the wires often get in the way of body movements. GN Netcom reports that some customers have their agents stand when making outbound calls because they found the practice increases productivity by making the staff more alert. That technique requires cordless sets.





The chief downside of cordless seats is higher costs: they are about 25-30 percent more expensive than corded models. Another potential issue is interference with other devices, like WiFi ([News](#) - [Alert](#)) networks and some Bluetooth units. Cordless models have varying ranges and there are limits to talk time from the batteries. The challenge is finding the right models that have the desired quality in often noisy environments, needed range, battery life, minimal interference, and superb wearability.

GN Netcom says that cordless units that have automatic radio power management provide less overheard and greater efficiencies resulting in longer battery talk time. To keep the headsets live contact centers can purchase a separate charging unit and second headset for 24/7 support. Most contact centers, it says, are not demanding that a single headset can provide talk time greater than 12 hours.

Jabra's GN9120 DUO offers up to 300 feet in range and up to eight hours of talk time. The new and complementary Jabra GN9125 operates on the digital enhanced cordless telephones or DECT ([News](#) - [Alert](#)) 6.0 3G standard that is low-interference and high quality. It supports up to 12 hours of talk time and has an electronic hook switch for integrated remote answer and calling. DECT 6.0 operates on the 1.9GHz frequency spectrum compared with 2.4GHz spectrum on standard cordless sets such as the GN9120.

Sennheiser Communications' ([News](#) - [Alert](#)) new VMX Office system enables users to make and take calls in their offices, on the road, and/or in their homes with great range and quality, plus wearer comfort. The VMX Office is comprised of a Bluetooth-enabled headset and a base station for use with a desktop phone console or connection to a PC soundcard. It has 30 feet range with Bluetooth and up to 100 feet with the base station. The headset powers up automatically when opened, and switches off when closed, eliminating worries about standby time.

VMX Office also features VoiceMax, which dampens intrusive background noise and enhances the human voice. It has in addition ActiveGard, which

## Going Cordless

Cutting the wires and going to cordless headsets can make a big difference in contact center operations, and service to customers and users. Witness Kingston Technology, whose MIS help desk, located in Fountain Valley, Calif., went wireless in October, 2007. The team, which has eight agents, resolves support issues from customers and employees.

Kingston switched to Plantronics' CS70N and Voyager 510 cordless headset systems from the older H-series corded models, most commonly the Plantronics H51. Both styles are lightweight, limit noise, and have excellent audio quality.

MIS employees could choose which cordless headset they wanted. Most selected the CS70N because it allowed them to receive calls away from their desks. The others picked the Voyager 510, which is Bluetooth-enabled, because they also wanted a headset that synced with both their mobile and work phones.

"Because our help desk team is relatively small, we were seeking a way to improve their service capabilities and be more efficient," explains Theron Sanders, MIS Help Desk Manager, Kingston Technology. "They are frequently away from their desks providing technical support to our employees, yet they have a steady stream of incoming help desk calls to handle. Therefore, they needed a way to be accessible and productive away from their desks. The Plantronics cordless headsets permitted this flexibility and functionality."

The results have been impressive. The MIS Help Desk experienced an approximate 30 percent productivity gain while hold times have dropped in the first seven months of going cordless. The team has closed problem tickets faster and finished projects sooner.

Employees have also been happier because the team is more accessible and has greater flexibility to attend to their issues in a faster manner. They have also been healthier as they have experienced less neck and back pain experienced by using other phone systems.

"The MIS Help Desk crew's Plantronics headsets have enabled them to multi-task, and therefore be more productive, because they can now answer calls away from their desks," reports Sanders. "Instead of running back and forth from hardware projects to pick up their phone, they can answer with the simple push of a button on their headsets and, once they've determined if it's necessary, return to their desks to assist the callers."



automatically reduces volume surges in milliseconds to protect the wearers' hearing.

"We are seeing more use of wireless headsets as the technology, as demonstrated in the VMX Office, has improved," reports Eric Palonen, Sennheiser USA's Product Manager. "The improved digital signal processing has cut down noise from both background and from cell and IP calls and has made these headsets more affordable. The design has made the sets comparable, from quality and wearer comfort perspectives, if not better than similar corded units."

### Wearer Comfort

Increased agent comfort as well as improved productivity is now part of today's headsets. Happier agents are more productive and tend to stay longer, decreasing turnover.

Plantronics' new EncorePro wideband headset combines lightweight comfort with a sleek design normally associated with consumer headsets. EncorePro also features a noise-cancelling mi-

crophone and unique sliding boom for precise microphone positioning. This feature improves intelligibility for clear conversations and minimal misunderstanding between agents and customers.

Jabra's new GN2124 headset has a neckband option that improves comfort and wearability. Many people don't like the having their hair or scalp squeezed by headbands, or have their ears pulled by over-the-lobe earhook pieces. Neckbands provide a great choice to those users that want greater comfort and flexibility, which is key when agents are wearing headsets for most of the entire time they are connected to callers.

**The following companies participated in the preparation of this article:**

**Jabra**  
[www.jabra.com](http://www.jabra.com)

**Sennheiser**  
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# Introducing the Global IVR Community

Evolving standards and speech technologies are driving the business case for companies to deploy new speech applications to create additional revenue streams, increase customer satisfaction, and trim costs. Voxeo's IVR Global Online Community on TMCnet is the industry destination for tools, information, and resources for building and deploying enhanced IVR and VoIP applications.

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## To Get Through Crisis Serve, Not Burn Customers

One of the most telling conversations I had while I was at ITEXPO West was with a senior business executive who told me that enterprises should focus on retaining customers and growing their bottom lines based on satisfaction and reputation rather than always seeking new buyers.

There are, as we agreed, no more big fields of new customers, waiting to be turned, and plowed, seeded, harvested and then forgotten about when the land has been played out, and then moving on to the next pasture. What we have is what is there.

That observation sizes up the US economy. It is fundamentally strong yet it is also mature, with slow growth, along with market share increases based more on product, price, service, and quality than on snagging buyers that want and have not yet purchased such items in the past.

Maturity is a concept that Americans, with the 'think young, limitless horizon' culture have, however, trouble accepting. Unfortunately as demonstrated with the financial crisis and a looming recession, pushing the markets beyond what they can sustain and ignoring sound customer bases, like an older person attempting feats done at half their age, risks collapse. This chain of events has been brought about in large part by firms, with government carte blanche, overreaching the markets by selling, building, and financing homes to prospects who could not have done so before instead of focusing on those who can buy them.

Yes, for the past 10-15 years the marketing mantra has been customer lifetime value: that it is less costly to retain and sell to existing customers than to acquire new ones, and that excellent customer service brings new and permanent buyers. Yet all too few enterprises practice these lessons, even though that these methods can make them money and can boost profits, because they have imbibed a blend of denial of limits and laziness. It is easier to sell than to retain, to promote rather than listen, and to market than service.

I had come across a business that in many respects epitomizes this attitude. This outfit yelled at its salespeople to 'sell, sell, sell!' It did not have a centralized customer database and its sales people were not allowed to contact customers once cash exchanged hands. Not surprisingly, reports began circulating that the sales per employee had dropped and quality had plummeted along with retention rates of high value customers, and staff.

To survive and prosper in today's environment, and to advantage of opportunities when better times return organizations should change their cultures to growing, tending, and replanting their customers, rather than slashing-and-burning them. They should

treat every one who has done or is doing business or could do business as golden, because they are: it is their gold they are spending. They should also welcome each opportunity to interact with customers and prospects as their lives depend on it, because they do. A firm is as only as good as its last interaction, sales, and product made, delivered, and used. The information-based solutions: speech and data analytics, contact management/CRM, BPA/SFA, EFM, knowledge management, QA, routing, and WFM/WFO are available to enable this transformation. These applications are becoming more functional, user-friendly, versatile, and affordable. One of the saving graces of even the toughest times is that individual ingenuity never dies, indeed it grows i.e. necessity is the mother of...

What is needed is the leadership to remodel enterprises so that they are truly customer focused, to make the investments in technology and training where needed and to pull together the entire team, especially those who interface with the customers: the contact center agents, retail staff, and sales personnel and imbue them with a mission to meet a common goal.

We are all customers. By enabling the best possible products and services, and services to support them we all win. And that's a strategy that will see us through to a more stable future prosperity.

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## Migrating To An All-In-One Solution... How Do We Get There?



By Tim Passios,  
Director of Product Management,  
Interactive Intelligence

**Q** The all-in-one contact center solution is definitely the way to go for the future of my contact center. But I've got a problem that's stopping me in my tracks. How do we move from a traditional multi-point communications system to an all-in-one solution and still protect our IT investment?

**A** This question comes courtesy of a CIO who approached me a year ago at the Gartner IT Symposium, and also from a contact center manager I spoke with at TMC's ITEXPO West in Los Angeles this past September.

In the CIO's case, he literally showed me a diagram of his organization's contact center architecture and couldn't stress enough the number of systems it consisted of. IVRs, ACDs, call recorders, a WFM system — you name it, there was a box for it, and the gentleman was more than willing to explain why each system was necessary and what specific business process it supported.

"It looks as if you have everything you need," I told him.

"Yes, we do," he said. "But this system is extremely complex, and the administration and energy costs alone are more prohibitive than I care to admit. In my mind, we need to simplify the whole thing, but I'm honestly not sure what our options are because we're so limited right now by expenses and budgets."

It was the same story from the contact center manager I met, who oversaw 1,500 agents along with tons of legacy equipment. She attended a presentation I gave in which one of the principal points was that all-in-one communications platforms and application suites will replace a majority of multi-point solutions within the next few years.

"I totally applaud the all-in-one movement," she let me know. "The thing is, we have so many systems from different vendors that are so tightly integrated... I can't get approval from upper management to make the move because they think it would be disruptive and too expensive. And even if I did get the OK, I wouldn't know where to start."

Trust me. I've heard from a lot of CIOs and contact center managers who feel trapped by the mixed bag of technology they have to work with — and who are frustrated by it. I also usually hear a common refrain of dichotomy among such decision-makers:

"Ripping and replacing an entire IT infrastructure of multiple systems isn't feasible,

yet the only way to get to an all-in-one solution is a matter of all-or-nothing."

This simply isn't true.

The biggest benefit of things like open software architectures, IP networks and SIP is that they've led to a broader path of integration for business communications. And totally unlike the heydays of legacy systems and vendor lock-ins, an open approach gives organizations more flexibility than they sometimes realize.

Organizations can integrate with more back-end systems and business applications. They can close the gap between a contact center and the rest of their enterprise. They can even migrate an installed multi-point hardware system to an all-in-one all-software platform piece by piece, as needed, to shelter the investment they've made in each system.

(Yes, this is a shameless plug. Our all-in-one Interaction Center Platform technology was developed using an open software approach in 1994 and architected for SIP in 2002. All along, our platform has allowed Interactive Intelligence ([News - Alert](#)) customers to integrate with existing IT frameworks, email platforms, databases, applications, CRM packages, speech engines, web servers and other business communications systems, most recently Microsoft's ([News - Alert](#)) Office Communications Server 2007.)

"Okay, show me how to do that without ripping and replacing our current systems." Two keys here:

Planning. Start with a detailed assessment of your existing technology — much like the CIO who approached me with his contact center's architecture diagram. Determine each system's status, the function(s) it serves, and what you wish to accomplish by moving it and other systems to an all-in-one solution. Less equipment and complexity? Lower energy costs? Central administration?

Planning also includes doing your homework to find a solution that will deliver on your overall objectives now and for the future.

Take incremental steps to the total move. Ease migration by replacing only one multi-point component at a time, or perhaps a few at a time. By design, all-in-one application suites allow a contact center to "turn on" only those applications it needs, when needed, such as ACD, IVR, voice mail, etc.

Consider this scenario for planning and making incremental moves:

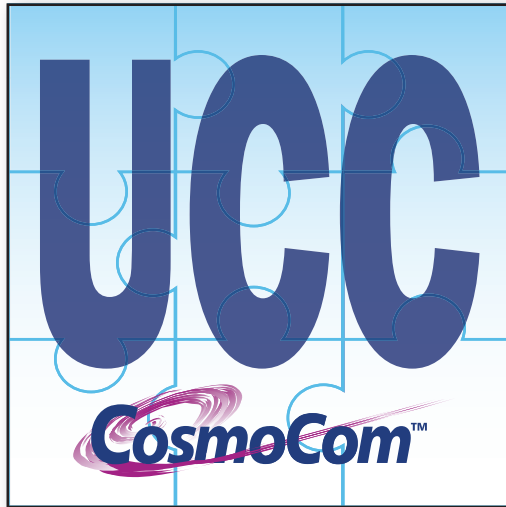
- Pinpoint an event that triggers the need for a new system, say an IVR reaching end-of-life status.
- Identify an all-in-one platform that allows you to replace your IVR with like or better functionality. Make sure the platform (and vendor) will support subsequent growth with standards-based integration to handle all the applications your contact center requires.
- As other triggers occur — needs for advanced ACD features, outbound dialing, a new voice mail system, etc. — look to the all-in-one platform you invested in for your IVR. As mentioned, a key benefit of software-based all-in-one platforms is that features are available and easily activated via a simple licensing process.
- In time, move the rest of your multi-point system functions and applications to the all-in-one platform in a "natural" progression.

Migration complete, investments protected, less complexity, central admin...and upper management applauds you for the lower costs.

*Tim Passios is Director of Solutions Marketing for Interactive Intelligence, Inc. For more information, contact Interactive Intelligence at [info@inin.com](mailto:info@inin.com) or (317) 872-3000.*



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